Simple. Flexible. Efficient.

DMS and ECM Interface

The <u>one</u> interface for your DMS system

Our DMS and ECM Interface App connects your ERP system Microsoft Dynamics 365 Business Central quickly and easily with your document management system: Choose between <u>Saperion ECM</u>, <u>SharePoint Online</u> or <u>ELO Digital Office</u>. We provide you with a tool that you can configure yourself according to your individual processes.
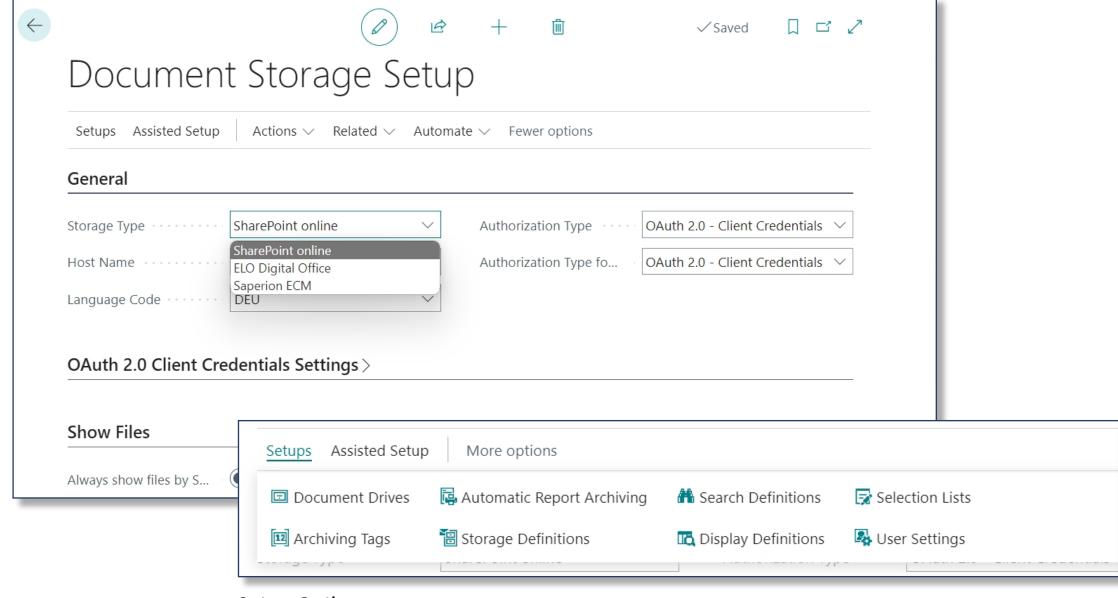
Simple.

App Setup

Select your document management system from the drop-down list and configure the app in a few steps using the setup wizard to get started quickly. Currently, connectivity to SharePoint Online, Saperion, and ELO systems is available. Alternatively and in addition to the guided setup, you can see the various configuration options on the right, which allow you to set up your DMS connection in all conceivable ways. Below you will find the definition of the archiving structure, tagging or automatic archiving as well as search definitions. There are no limits to what you can do.

Do you need help with the setup?

Help Docs

DMS and ECM Interface App Setup Wizard

Document Storage Setup

Setups Assisted Setup Actions ⌄ Related ⌄ Automate ⌄ Fewer options

General

Storage Type .... SharePoint online
SharePoint online
ELO Digital Office
Saperion ECM
Host Name ....

Authorization Type .... OAuth 2.0 - Client Credentials

Authorization Type fo... OAuth 2.0 - Client Credentials

Language Code .... DEU

OAuth 2.0 Client Credentials Settings ›

Show Files

Always show files by S...

Setups Assisted Setup | More options

📄 Document Drives   📑 Automatic Report Archiving   🔍 Search Definitions   📋 Selection Lists
🔢 Archiving Tags   🗄 Storage Definitions   📊 Display Definitions   ⚙ User Settings
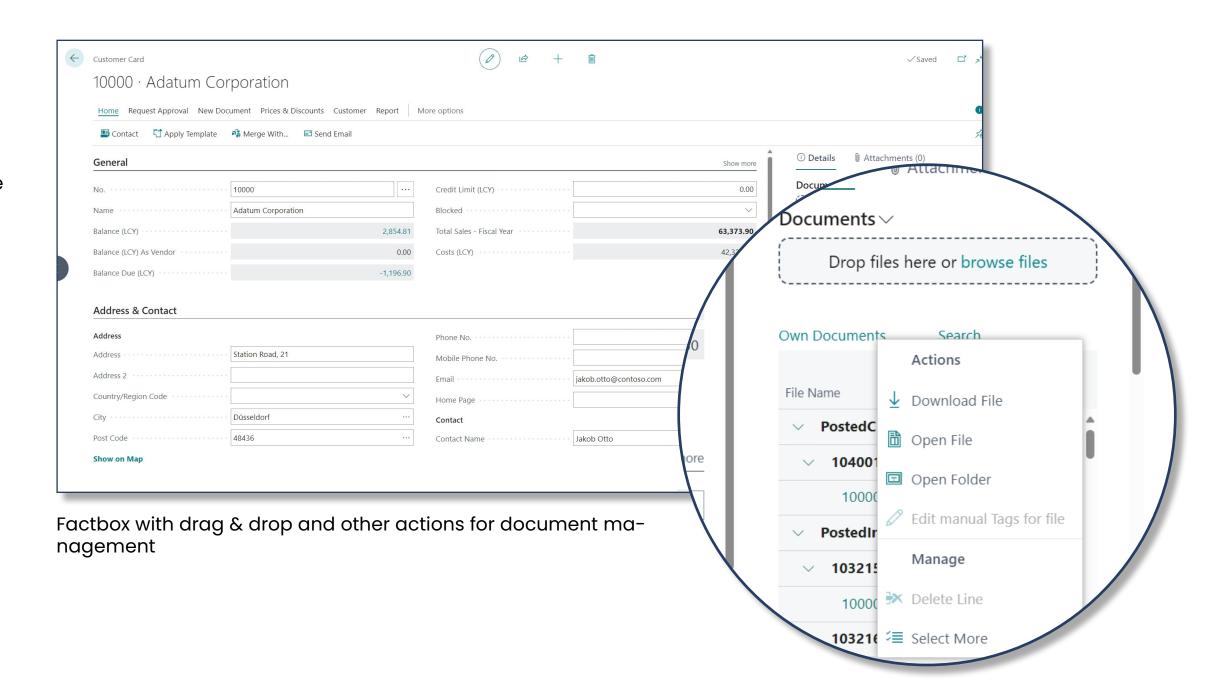
Setup Options

Drag & Drop archiving for an intuitive way of working

Drag & Drop Archiving

Documents can be uploaded simply by dragging and dropping within the upper, dashed area of the factbox. The tagging / adding metadata for the document is done according to the default settings and can be added automatically for each field or manually. If master data such as the customer name change, this information is automatically adopted for all documents concerned. Within the factbox, all documents linked to this entry are listed in a dynamic folder structure. Clicking on the three dots opens the various management functions for the selected document.
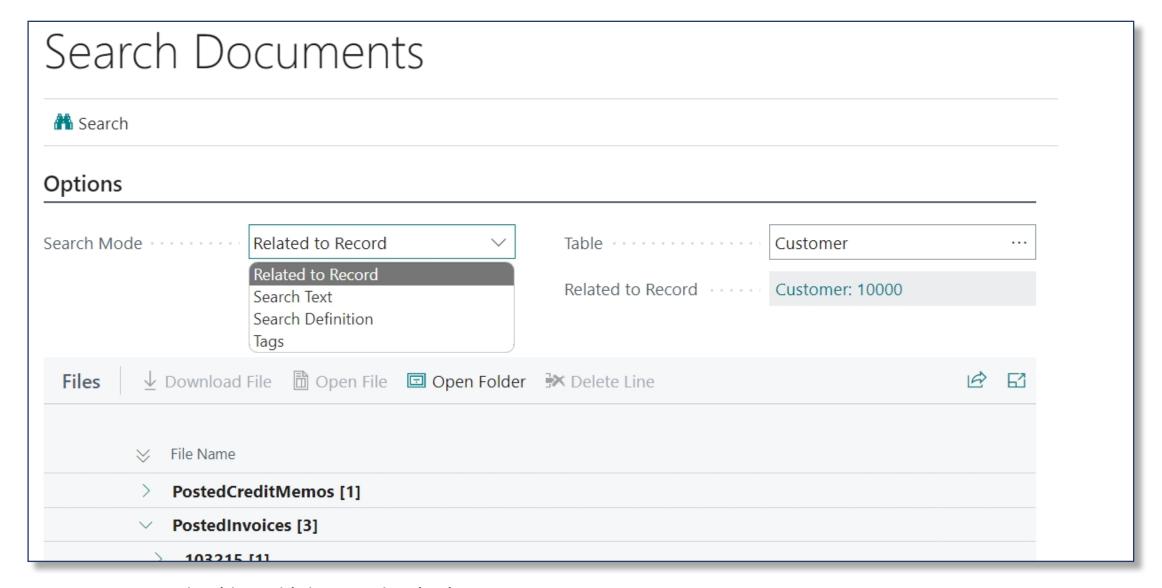

Factbox with drag & drop and other actions for document management

Flexible.

Document Search

With a large number of documents, it is easy to lose track of them all. This makes a well-designed search function all the more crucial. You have a wide range of options for searching your documents. For example, you can choose between a simple text search or a search definition that you have previously defined youself. Beyond that, you can filter using search texts within metadata. This way you are guaranteed to quickly find the document you need. Here you also have the option to adapt the search to your individual processes and preferences or stick to the standard.
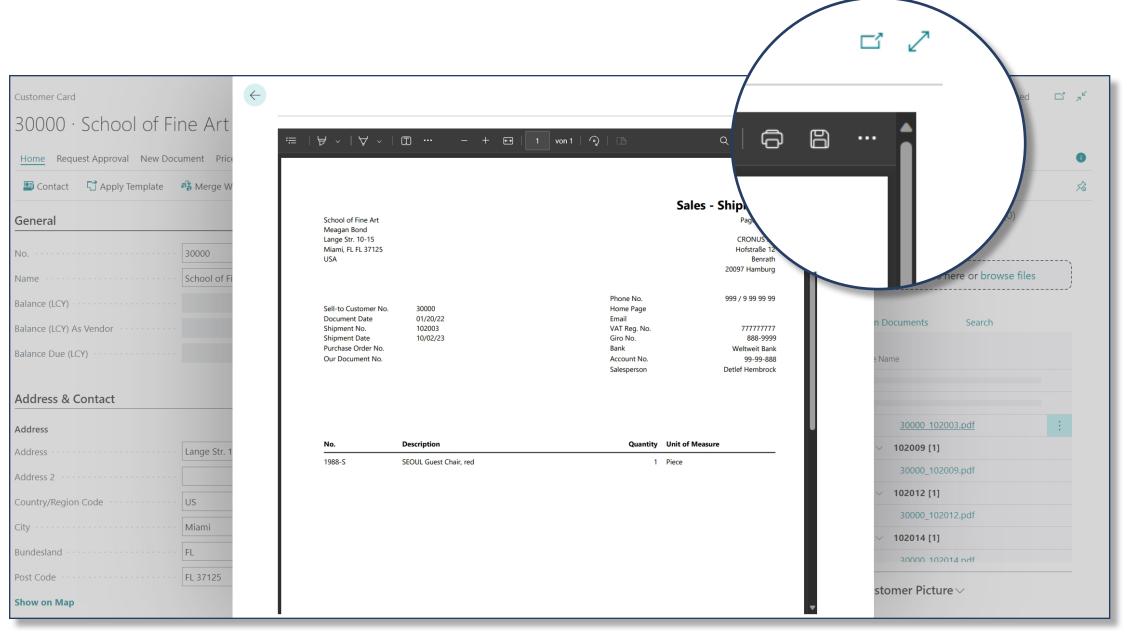
Search Documents

🔍 Search

Options

Search Mode	Related to Record ⌄	Table	Customer ···
	Related to Record	Related to Record	Customer: 10000
	Search Text		
	Search Definition		
	Tags		

Files   ⬇ Download File   ▦ Open File   ▣ Open Folder   ✂ Delete Line   ↗ ⤢

⌄ File Name

   ❯ **PostedCreditMemos [1]**

   ⌄ **PostedInvoices [3]**

     ❯ **103215 [1]**

Document search with multiple search criteria

Preview Feature

Click the document to open the high-quality preview. Use the 'Open Page in New Window feature' to keep the document open and view it on a second screen while you continue working in Dynamics 365 Business Central. This also allows you to place several documents next to each other and compare them. That saves you from downloading the documents beforehand and allows you to work quickly within Business Central. Editing the document within the preview using the browser functions is only temporary. No changes are made to your documents. However, you may still need them for visual support.
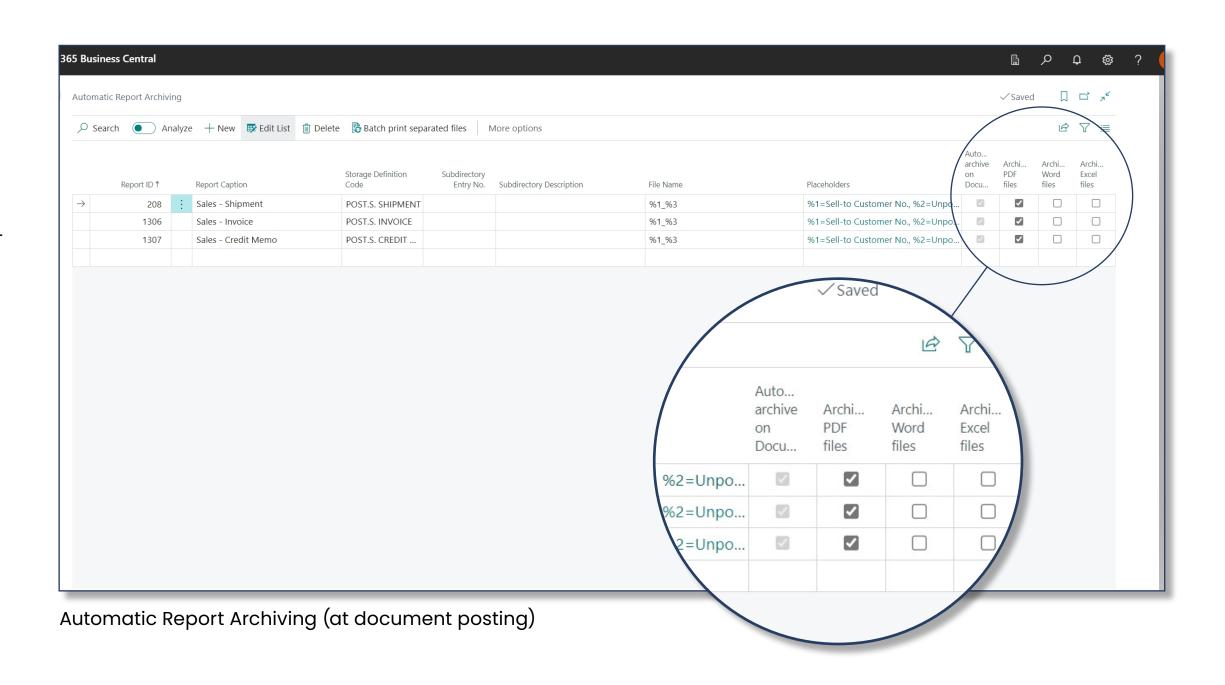

Preview of a Document

Efficient.

Automatic Archiving

The automatic archiving of posted documents can be flexibly set up and managed. Defining storage rules and the composition of filenames, you create the basis for legally compliant, audit-proof archiving. You not only save resources and costs, but can also be sure that the documents are stored where they should be.

Automatic Report Archiving (at document posting)

There is a 30-day free trial for our app.

You do not sign up for a subscription.

| Free Trial | Help Docs | Contact |

KUMA VISION