Document one
Document Management solution for SAP Business One

Document One allows attaching files and documents of various types (**Excel, Word**, **PDF, Outlook** message etc.) into SAP Business One objects (Business Partner, Invoice, Purchase Order etc.).
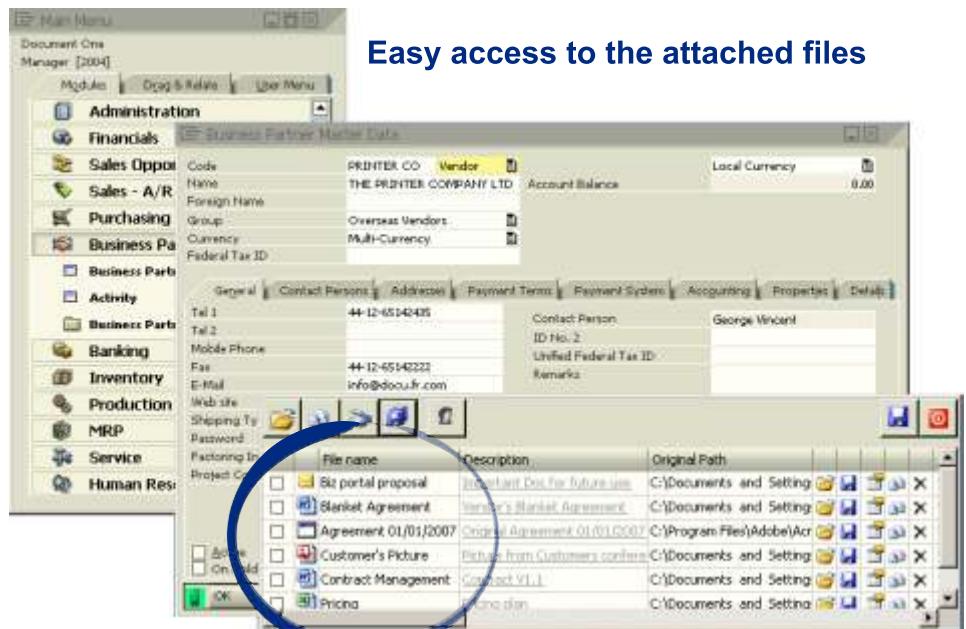
Document One allows attaching the file in various ways:
● Scanning files and attaching them directly to SAP Business One objects
● Attaching files by browsing the computer folders
● Attaching files by using the Drag & Drop option
● Sending emails directly from Outlook to SAP Business One

Document One advantages:

● Easy to use Document management tool
● 'Plug & Play' installation
● Enables a '360' view of your Business Partner by attaching all relevant docs (Proposals, Contracts etc.)
● Easy control over the overflow of office documents, allows a paperless office
● Centralized Document management integrated with your ERP system, no need for a separate system
● The attached files are being copied and saved in SBO's database (included in SBO backup)
● Reviewing and managing files can be controlled by authorizations definitions for SAP Business One by users and departments
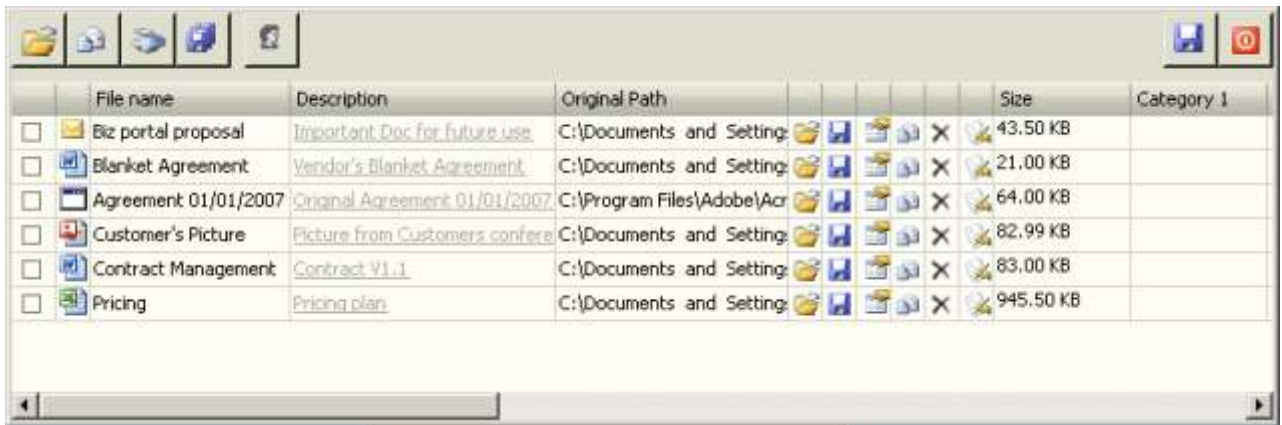
Easy access to the attached files

Attaching files can be done by clicking on the icon while in the relevant object.
The icon is red when there are no files attached
and green when there are attached files.

Clicking on the icon will open the attached files table and displays the following info:
● File name
● File type [Word Doc, Outlook email, PDF, Excel etc.]
● File save date

Simply Click on any file to open it directly from the SAP Business One object.

Upper Menu icons

Attaching files - Opens window's browser allowing to select files for attachment.

It is possible to add files using **Drag & Drop.**

Mailing files - sends selected files from the list as an e-mail.

Scanning files - scans files and attaches them to a SAP Business One object.

Saving files - Saves files from the list on the computer.

Attached files report - Opens the attached files report for the BP that is in the

present object.
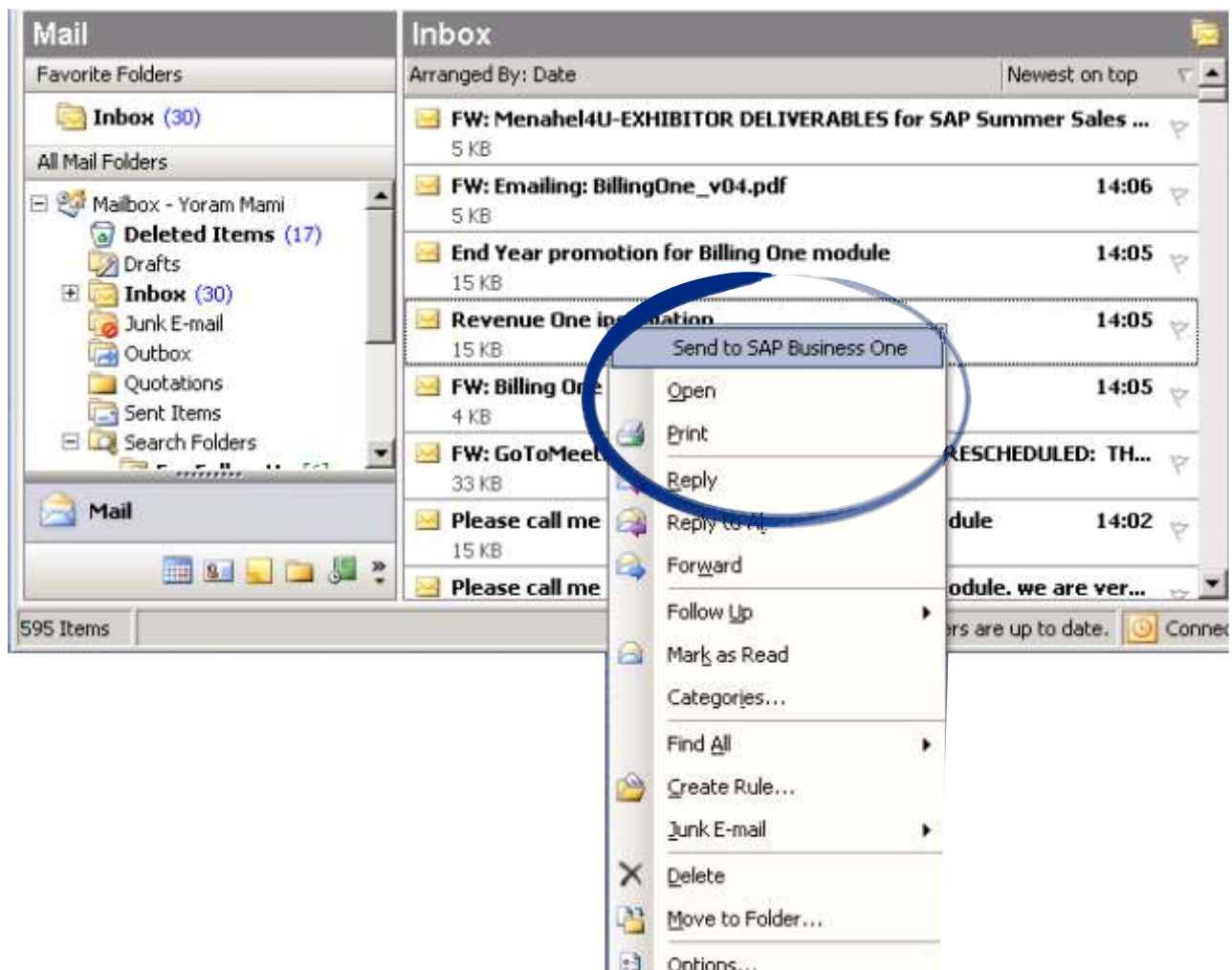
Save Settings - Saves all changes .

Close - Closes the attached files table.

Sending emails directly from Outlook to SAP Business One in 3 alternative ways:

- Use the right click option
- Automaticly identiying the BP if original email was sent from Document one
- Drag and Drop the email message

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Document One supports attachments to both standard SAP Business one entities and to Custom entities.

Authorizations

Document One supports authorizations definitions for accessing attached files in built in documents settings window and in Custom Document Settings window.

Authority levels available: All users, file creator, authorized users from the user's list in SBO and authorized departments from the department's list in SBO.

Reports
The Documents reports enables supervision and control on attached files in the system. It allows search by:

- **Free Text** - Free text in the file name.
- **SBO Documents** - Document type and Number.
- **BP's details** - Code and Name
- **Dates** - File date and Attach Date
- **Categories**
- **Contents Type**
- **File Creator**