

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.).

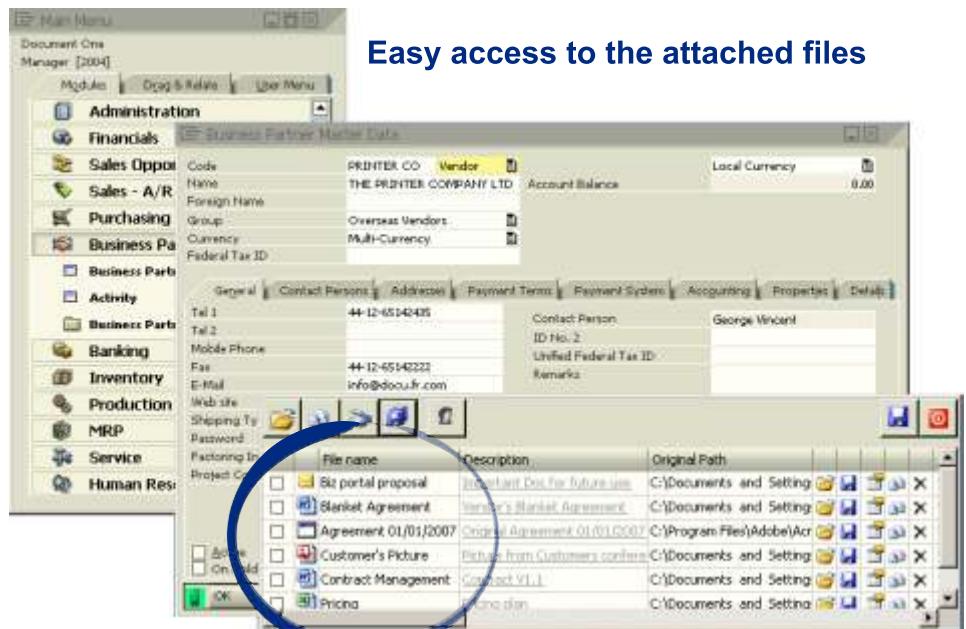
Document One allows attaching the file in various ways:

- 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



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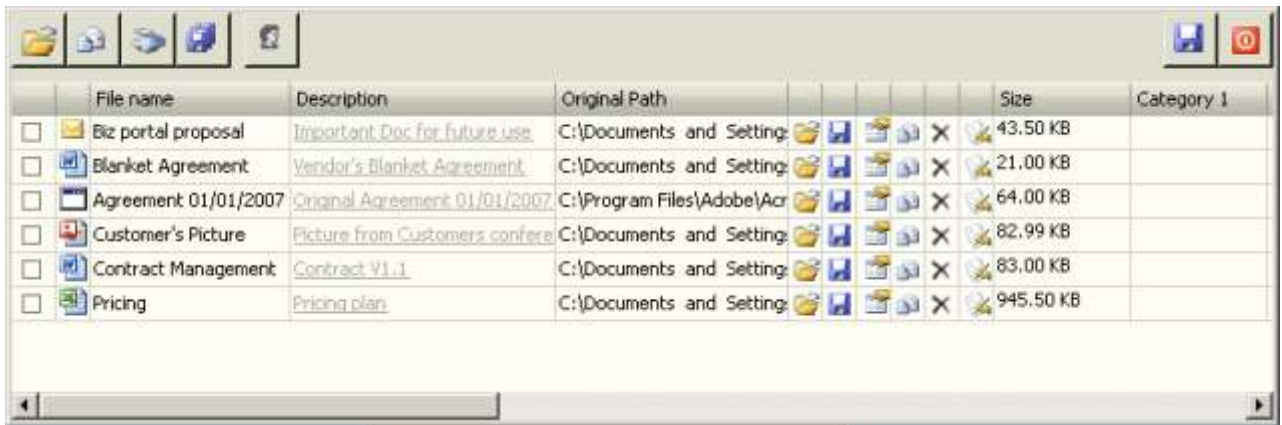
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Attaching files can be done by clicking on the icon while in the relevant object. The icon is **red** when there are **no files attached** and **green** when there are **attached files**.

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.



	File name	Description	Original Path			Size	Category 1
<input type="checkbox"/>	Biz portal proposal	<u>Important Doc for future use</u>	C:\Documents and Setting...			43.50 KB	
<input type="checkbox"/>	Blanket Agreement	<u>Vendor's Blanket Agreement</u>	C:\Documents and Setting...			21.00 KB	
<input type="checkbox"/>	Agreement 01/01/2007	<u>Original Agreement 01/01/2007</u>	C:\Program Files\Adobe\Acr...			64.00 KB	
<input type="checkbox"/>	Customer's Picture	<u>Picture from Customers confere</u>	C:\Documents and Setting...			82.99 KB	
<input type="checkbox"/>	Contract Management	<u>Contract V1.1</u>	C:\Documents and Setting...			83.00 KB	
<input type="checkbox"/>	Pricing	<u>Pricing plan</u>	C:\Documents and Setting...			945.50 KB	

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 .

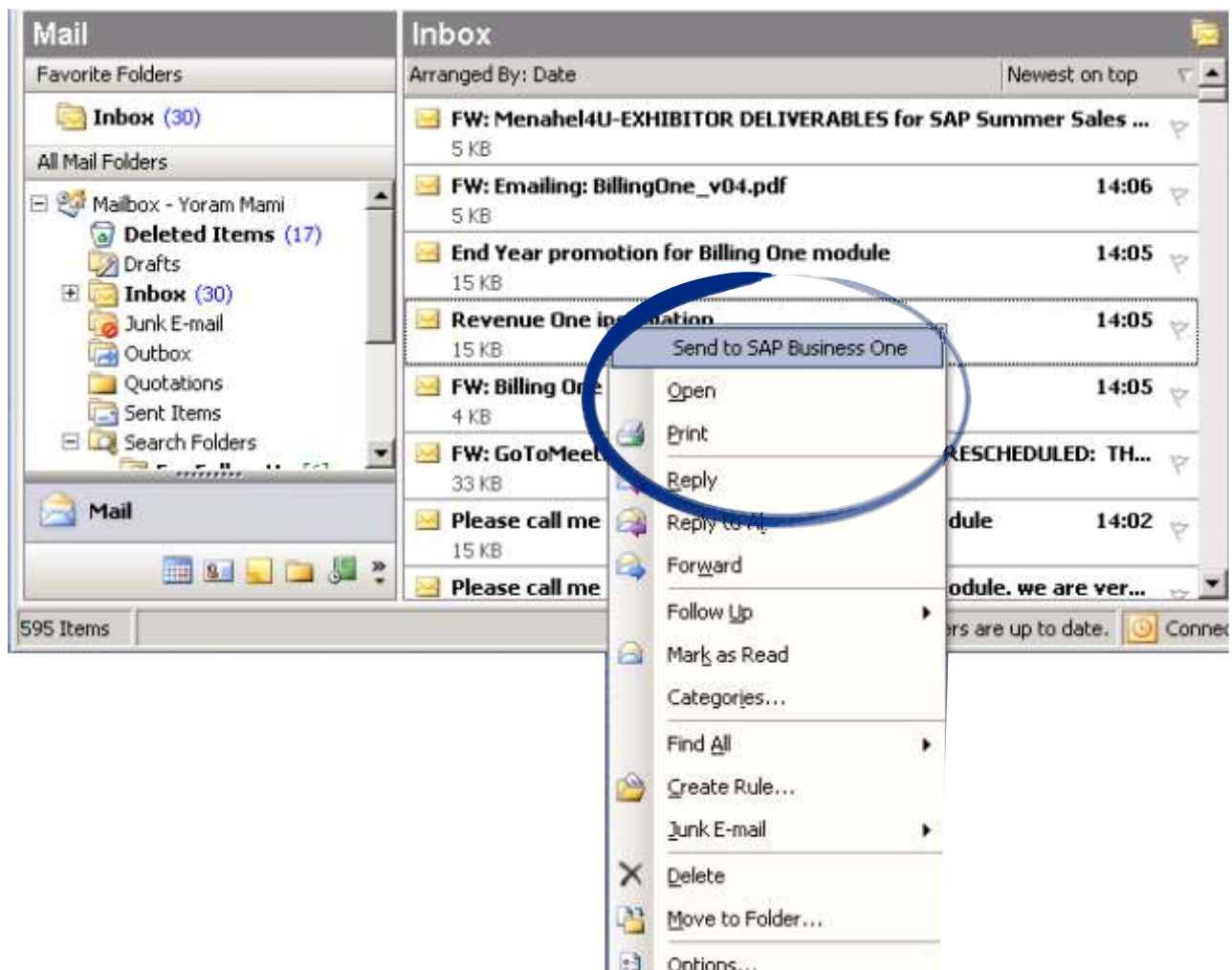


Close - Closes the attached files table.



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

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



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

Built-in document settings

#	Active	Document name	Location	Offset H.	Offset V.	Authorization	Edit	Show
1	<input checked="" type="checkbox"/>	Business Partner	Bottom-left	0	0	All company use	Edit	
2	<input type="checkbox"/>	Journal Entry	Bottom-left	0	0	All company use	Edit	
3	<input type="checkbox"/>	Sales Opportunity	Bottom-left	0	0	All company use	Edit	
4	<input type="checkbox"/>	Price Proposal	Bottom-left	0	0	All company use	Edit	
5	<input type="checkbox"/>	Purchase Order	Bottom-left	0	0	All company use	Edit	
6	<input type="checkbox"/>	Delivery note	Bottom-left	0	0	All company use	Edit	
7	<input type="checkbox"/>	Sales Return	Bottom-left	0	0	All company use	Edit	
8	<input type="checkbox"/>	Invoice	Bottom-left	0	0	All company use	Edit	
9	<input type="checkbox"/>	Refund	Bottom-left	0	0	All company use	Edit	
10	<input type="checkbox"/>	Receipt	Bottom-left	0	0	All company use	Edit	
11	<input checked="" type="checkbox"/>	Purchase Order	Bottom-left	0	0	All company use	Edit	
12	<input type="checkbox"/>	Purchase Return	Bottom-left	0	0	All company use	Edit	
13	<input type="checkbox"/>	Purchase Return	Bottom-left	0	0	All company use	Edit	
14	<input type="checkbox"/>	Purchase Invoice	Bottom-left	0	0	All company use	Edit	
15	<input type="checkbox"/>	Purchase Credit Memo	Bottom-left	0	0	All company use	Edit	
16	<input type="checkbox"/>	Payment to supplier	Bottom-left	0	0	All company use	Edit	
17	<input type="checkbox"/>	Item	Bottom-left	0	0	All company use	Edit	
18	<input type="checkbox"/>	Stock Entry	Bottom-left	0	0	All company use	Edit	
19	<input type="checkbox"/>	Stock Exit	Bottom-left	0	0	All company use	Edit	
20	<input type="checkbox"/>	Transfer between warehou	Bottom-left	0	0	All company use	Edit	
21	<input type="checkbox"/>	Production order	Bottom-left	0	0	All company use	Edit	
22	<input type="checkbox"/>	Production stock exit	Bottom-left	0	0	All company use	Edit	
23	<input type="checkbox"/>	Production stock receipt	Bottom-left	0	0	All company use	Edit	
24	<input type="checkbox"/>	Employee	Bottom-left	0	0	All company use	Edit	
25	<input type="checkbox"/>	Service Call	Bottom-left	0	0	All company use	Edit	
26	<input type="checkbox"/>	Customer Equipment	Bottom-left	0	0	All company use	Edit	

OK Cancel



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**

#	File name	Description	Original Path	Size	Category 1	Category 2	Category 3	Category 4
1	Elz portal proposal	Important Doc for future use	C:\Documents & Settings\user\My Documents\Elz portal proposal	43.50 KB				
2	Blanket Agreement	Vendor's Blanket Agreement	C:\Documents & Settings\user\My Documents\Blanket Agreement	21.00 KB				
3	Agreement 01/01/2007	Original Agreement 01/01/2007	C:\Program Files\Agreement 01/01/2007	64.00 KB				
4	Customer's Picture	Picture from Customers confirm	C:\Documents & Settings\user\My Documents\Customer's Picture	82.99 KB				
5	Contract Management	Contract V1.1	C:\Documents & Settings\user\My Documents\Contract Management	83.00 KB				
6	Pricing	pricing plan	C:\Documents & Settings\user\My Documents\Pricing	945.50 KB				

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