

B1 PRODUCTIVITY PACKAGE

Get more value with your SAP Business One

B1 Document Manager

B1 Document Manager (B1DM) is a tool for companies wishing to monitor their attached files more closely (e.g. ISO certifications) and enrich them with associations to SAP projects, profit centers, documents etc. B1DM enables you to administer documents outside SAP Business One on a designated server, but you can still find these documents in SAP Business One.

This is made possible by B1DM's highly configurable keyword system which allows users to create predefined and custom search-terms for files located in business partner and item folders. By doing so it is possible to search for specific documents that are placed inside the SAP Business One database AND in a designated folder on a server.

The image displays two screenshots of the B1 Document Manager software interface. The top screenshot shows the 'Attach document' dialog box. It includes fields for 'Link' (Business Partner, C20000, Norm Thompson), 'New file' (empty), 'Template' (Standard Contract), 'Metadata' (Profit Center, Project: Med Constructions abc, Document: Quotation, ISO-No: 1234), 'Preview folder' (C:\B1DM\BP\C20000 - Norm Thompson), and 'Preview file' (Contract_PRO_PRJ02_ISO_1234.docx). The bottom screenshot shows the 'Search documents' dialog box. It includes a search bar, search type (Business Partner, C20000, Norm Thompson), search options (Date - From, Date - To, Search in files, Search in SAP), and a table of search results.

Type	Id	Details
▼ A/R Invoice (1)		
	→ 232	Norm Thompson - Ref 1234
▼ Files (1)		
	→ Contract.docx - C20000 - Norm Thompson	C:\Documents and Settings\mtej\Skrivebord\C2

B1 Document Manager will be part of the B1 Productivity Package. Further addons are to be added subsequently.

B1DM can be activated in the B1UP configuration. Make sure to have the latest version of B1UP installed.



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Boyum IT A/S
Egsagervej 11
DK-8230 Aabohøj
www.boyum-it.com

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