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FACT SHEET d.velop connect for Microsoft Dynamics 365 Finance and Operations

Integrated and secure information management – simple and intuitive

Company-wide information center

Connect your Dynamics 365 to your d.velop documents repository either in the cloud or as a hybrid cloud/on-premises solution. d.velop connect for Dynamics 365 provides the point of entry for doing so in your d.velop cloud environment. By fully integrating the systems in this way, you can easily take all your documents and receipts from your ERP software and store them securely in your ECM system, which serves as your company-wide information center. With d.velop connect for D365, you are adding an integrated, structured information management tool to your ERP system.
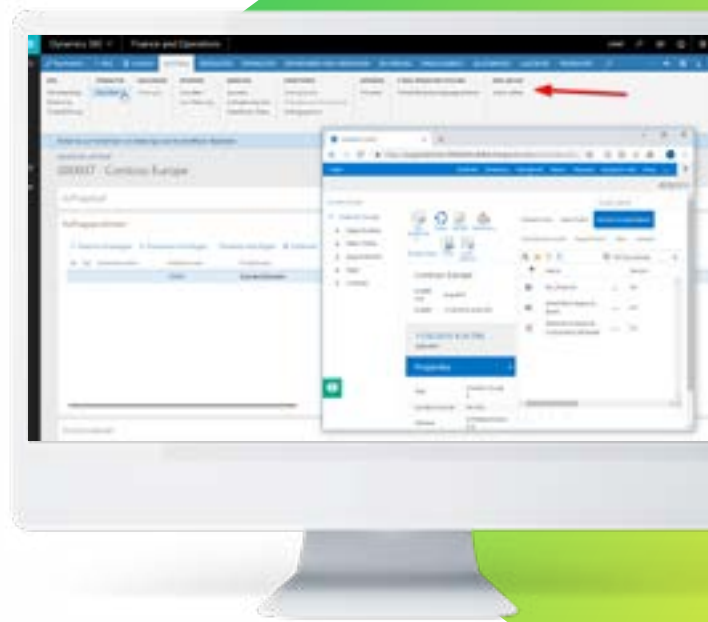
Provide centralized information even to staff without ERP access and enhance Dynamics 365 with the ability to digitally customize your business processes. Meanwhile, documents and information are stored in an audit-compliant manner as part of the process.

Ensure auditing compliance with fully automated document storage and archiving

As soon as a document is printed in Dynamics 365 with the configured integration interface, this triggers the fully automatic storage and archiving of the document. The document is indexed and transferred straight to the archive system, without the need for any further steps. That guarantees that every single desired document is archived – in a reliable and audit-compliant manner. Of course, you also have the option to store documents or files manually using the document management tool.

Fully integrated

d.velop connect for D365 creates a seamless connection between your ERP system and the d.velop digital archive systems – with a bidirectional exchange of information. By integrating the ECM system, all the outbound documents printed in D365 are automatically stored in the central information management solution. That also ensures they are available outside the ERP system. Conversely, information from other systems such as Microsoft Outlook that is added to a supplier dossier in the ECM system, for example, is also made directly available in the ERP system.

Opening a context-based customer dossier from Dynamics 365 FO

This is particularly useful for correspondence, such as e-mails, telephone memos, delivery notes, etc.
Thanks to d.velop connect for D365, you can now connect information objects, processes and people across all the different departments within your company.
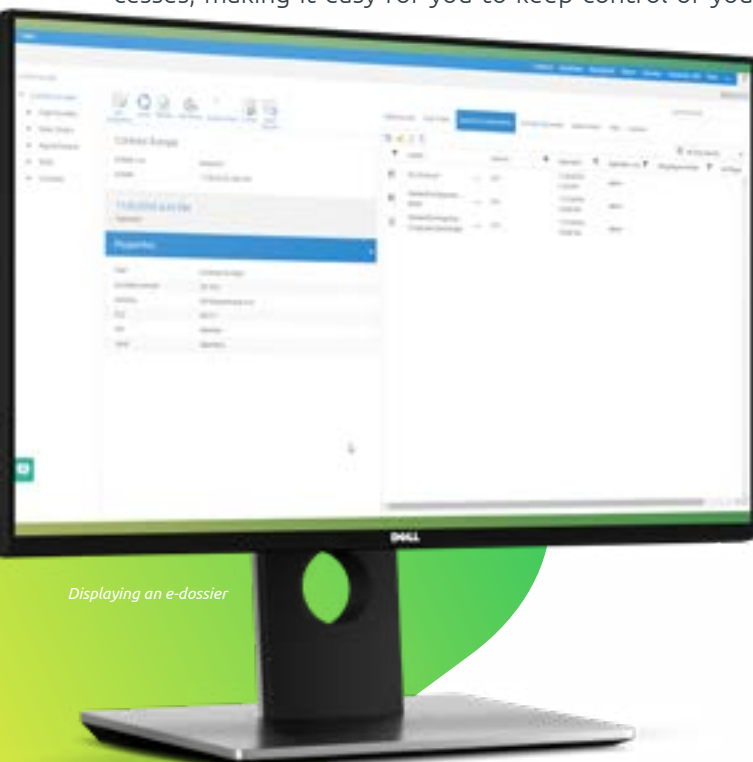
daily business. You benefit from all your staff being able to access all customer and supplier information – even if they don't have access to the ERP system. And of course, it's all managed with a finely customizable authorization system.

Central information management

d.velop connect for D365 does much more than simply archive incoming and outgoing documents. In combination with the d.velop ECM systems, it's easy and intuitive to add all kinds of other Iinformation items such as supplier dossiers, correspondence,drawings, reports or data processing documents. This information is also available within the ERP system – well structured, quickly accessible and within the context of your task. In many cases, you do not even have to switch to the ECM system for a 360° perspective of your business processes, making it easy for you to keep control of your

Expand the functionality of your ERP system

d.velop connect for D365 enhances your ERP system with the ability to perform custom processes on objects, including approving invoices or informing colleagues by e-mail when an important event occurs. When your ERP system reaches the limits of its capabilities, integration with your ECM system allows you to take the decisive next step. Take advantage of these and a wealth of other functions to ensure the success of your business.

Advantages at a glance

- ✔ Ready for D365 (Finance and Operations, Business Central, Customer Engagement)
- ✔ Fully automated, audit-compliant archiving in the background
- ✔ Search for documents directly from D365
- ✔ Document-based or integrated context display, no media gaps
- ✔ Integrated information management thanks to the integration of our e-dossiers

Displaying an e-dossier

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The d.velop group develops and markets software for the complete digitization of business processes and industry-specific procedures, and advises companys in all areas of digitization. In addition to its established ECM portfolio of services relating to document management, archiving and workflows on mobile apps as well as standardized and custom SaaS solutions, the software manufacturer has also expanded to offer managed services. These services include sophisticated compliance management to provide legal certainty and ensure compliance with all statutory regulations.

d.velop helps businesses and organizations reach their full potential by offering digital services that connect people to each other and that simplify and retool procedures and processes.

A strong, global network of around 360 specialized partners ensures that d.velop Enterprise Content Services are available worldwide.

d.velop products – whether on premises, in the cloud or in a hybrid form – are now used by more than 12.200 customers across multiple industries with over 2.8 million users; these customers include Tupperware Germany, eismann Tiefkühl-Heimservice GmbH, Parker Hannifin GmbH, Nobilia, Schmitz Cargobull, FingerHaus GmbH, the city of Wuppertal, Basler Versicherungen, DZ Bank AG, Saarland University Medical Center and Greifswald University Hospital.

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