

DocSolutions For Sharepoint

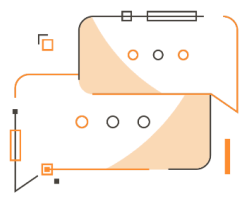
creation, distribution, and storage of documents into
Sharepoint within Microsoft Dynamics 365 Business Central



DocSolutions For Sharepoint

App for Microsoft Dynamics 365 Business Central

DocSolutions For Sharepoint enables the integration with Sharepoint, an online Content Management System (CMS), that allows the creation, distribution, and storage of documents in cloud without leaving your Business Central.



Do you need to create and archive documents in cloud without leaving your ERP system?

How it works

Thanks to DocSolutions For Sharepoint:

- for each table, you can manage different types of storage
- you can create multiple storage for the same table, with different destinations
- integration with Sharepoint Online is folder-based
- 23 tables "out of the box"

Quick Guide

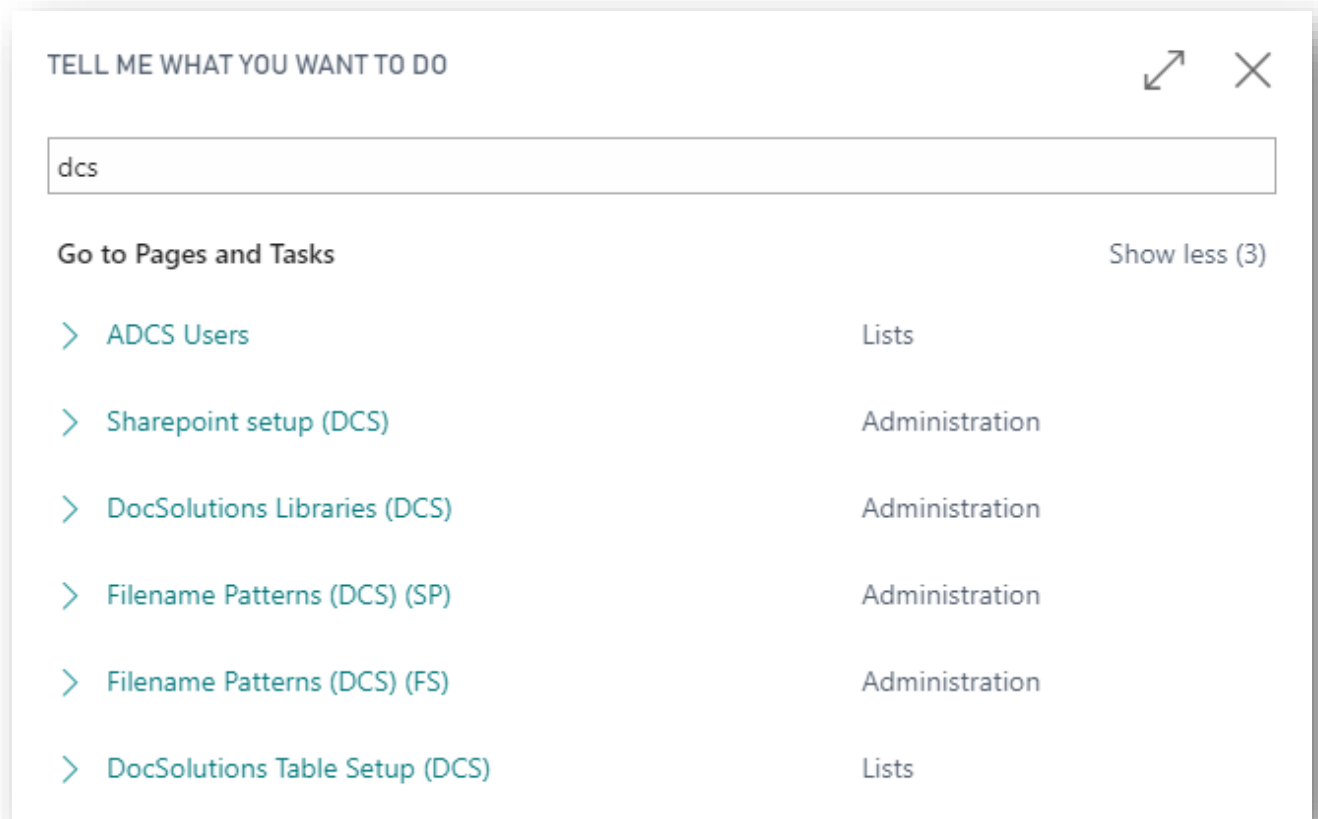
Ready in a few steps:

1. Create the specific setup for Sharepoint, Tables, Libraries.
2. Define the file/folder storage pattern
3. Upload files



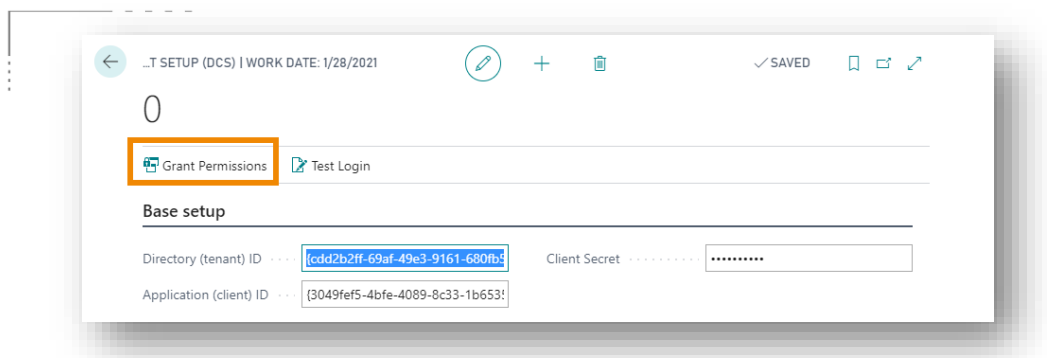
DocSolutions For Sharepoint - SUMMARY

Press ALT + Q and digit "DCS" for a list of the features involved:



Setup

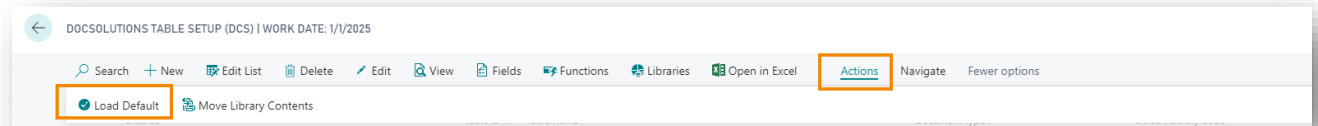
In Sharepoint setup (DCS) you need to connect your Business Central client to the Sharepoint tenant:





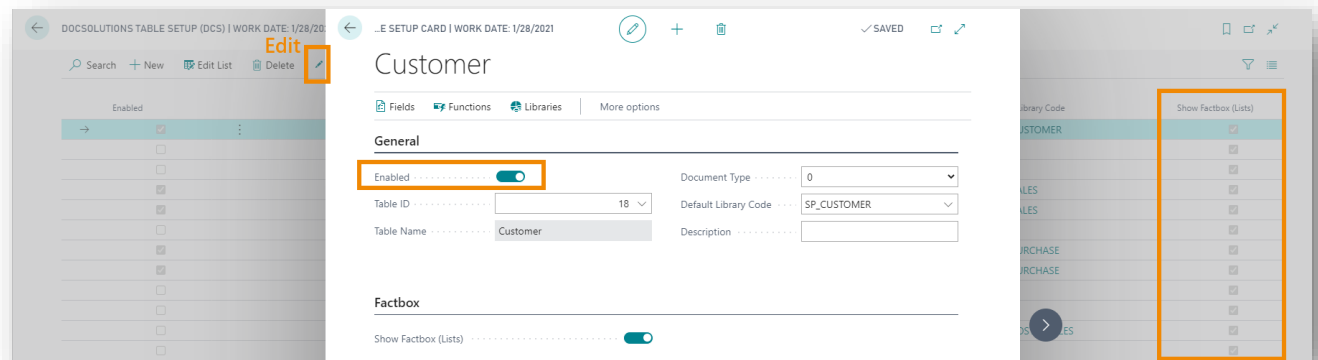
DocSolutions Table Setup (DCS)

In DocSolutions (DCS) Table Setup, the default setups must be loaded from Actions-> Load Default:



Libraries Setup

From Edit, open the Document Library(s) you wish to enable, e.g. "Customer":

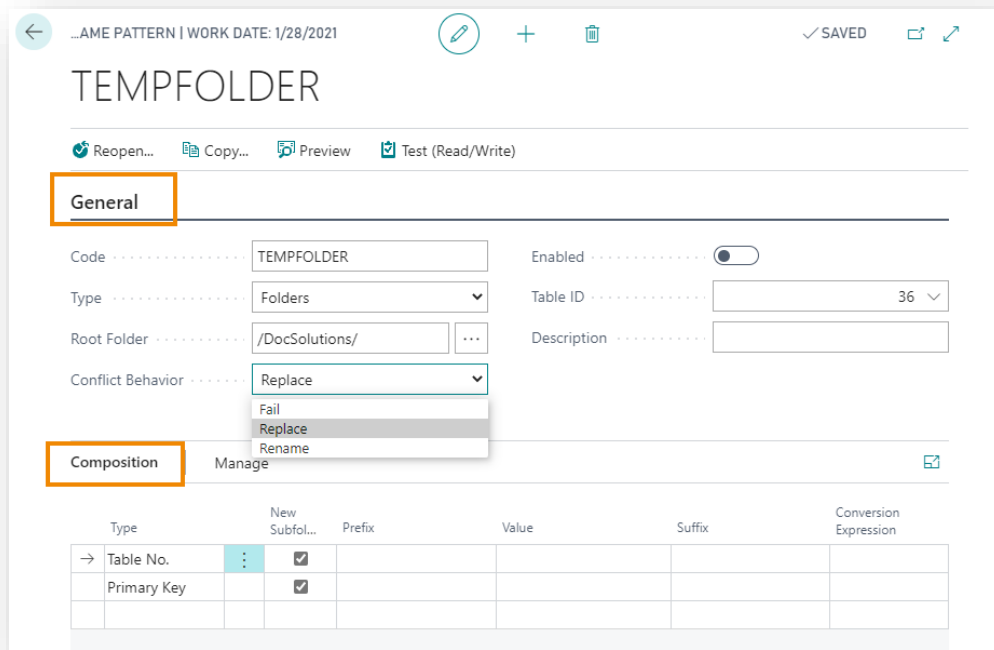


the system automatically enables the display of the Factbox relating to DCS on the Lists.

From Libraries we choose a default library and from Open library we set its setup:

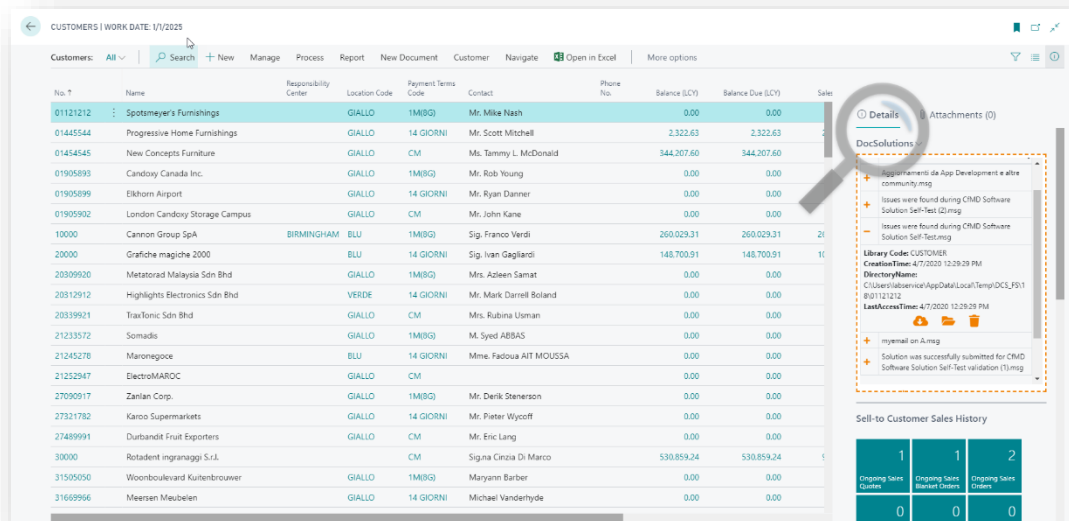
Folder pattern

From the drop-down menu on the Folder Pattern Code field, choose "Select from full list" and from Manage-> Edit you can view/modify the document storage path:



Factbox

After configuring the [setup](#), for example by opening the Customer List, you will see the factbox on the right:

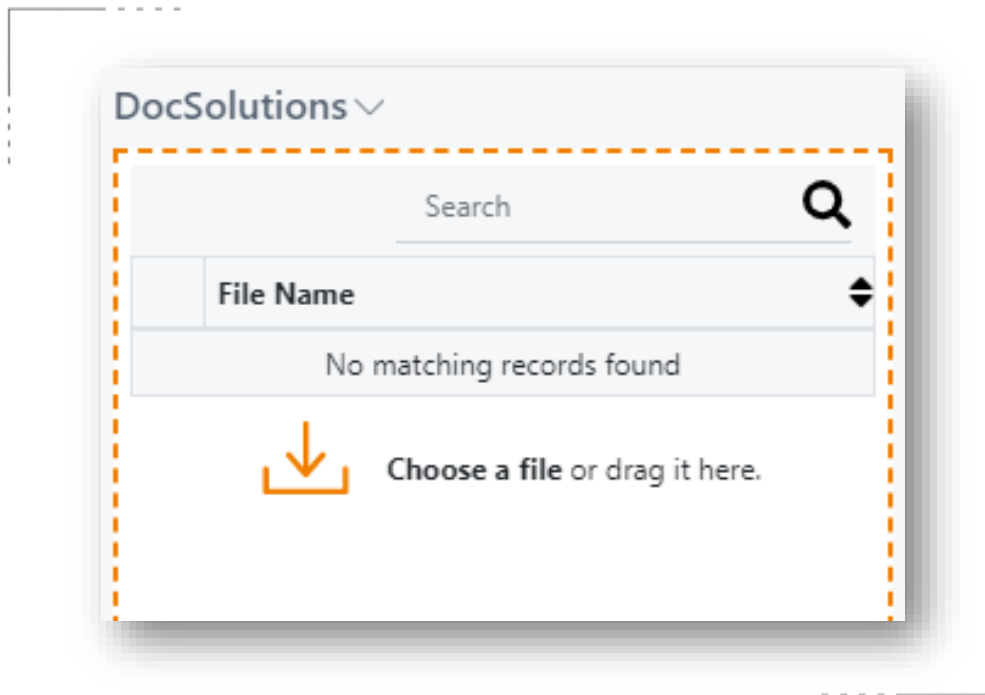


the already loaded file shows, as attributes, what has been set at setup: the Library chosen as the path, the Creation Time (returned by Sharepoint), the Directory Name and the Last Access Time.

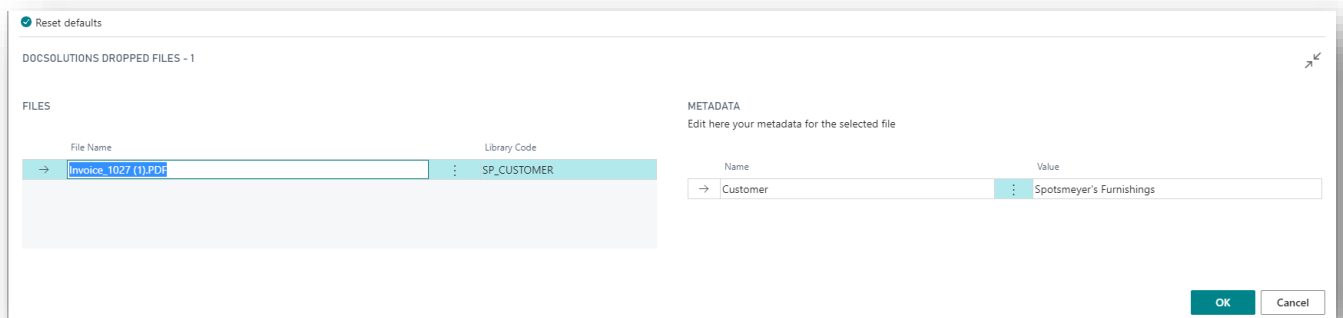


File upload

To upload a file, you can choose it by clicking on "Choose a file" or drag & drop (also active from Outlook).



the system shows the file name, the library chosen for uploading and the editable metadata:





Click OK and the system will upload the file:



You can **delete** the file by pressing on the recycle bin. You can **download** the file by pressing on the cloud.

The magnifying glass (Search) allows you to **filter** the uploaded files.

You can see the uploaded file **inside Sharepoint** by pressing on the folder.

Subscription

Some features of the DocSolutions For Sharepoint (DCS) app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard

Contact us for more info:

www.eos-solutions.it/en/contact-support.html



www.eos-solutions.it