



**COSMO CONSULT**  
Business-Software for People

**Business-  
Software  
for People**



## Document Management Pack

EMAIL DISTRIBUTION WITH USER-SPECIFIC CONTENT

COPY & PASTE FORMATTED WORD CONTENT DOCUMENT MANAGEMENT WITH SHAREPOINT

AUTOMATIC DOCUMENT ARCHIVING DRAG & DROP FILING

DESIGN OF REPORTS IN MICROSOFT DYNAMICS NAV, WITHOUT VISUAL STUDIO

AUTOMATIC INDEXING CONSISTENT SYSTEM FOR DOCUMENT FILING

# DOCUMENT MANAGEMENT

ALL DOCUMENTS IN MICROSOFT DYNAMICS NAV AT A GLANCE

BOILERPLATES FOR HEADER, LINE AND FOOTER TEXTS

**Microsoft  
Partner**



Gold Enterprise Resource Planning  
Gold Data Platform  
Silver Collaboration and Content  
Silver Data Analytics

# Document Management Pack from COSMO CONSULT

Report Management for Microsoft Dynamics NAV

## The cc|document management pack (DMP) consists of

- ▶ cc|text module,
- ▶ cc|document configurator,
- ▶ cc|formatted documents and
- ▶ cc|dms.

With DMP, users can design, format and manage documents, reports and all kind of orders easily and directly in Microsoft Dynamics NAV. They also can store the documents in the DocumentBox (integrated seamlessly) in Dynamics NAV by dragging a file from the computer and dropping it into the DocumentBox. In the background the file will be uploaded (with all needed metadata) into Microsoft SharePoint. With DMP, users can handle all report layout requirements without any programming skills.

## EMAIL DISTRIBUTION

The Dynamics NAV functionalities “Email” or “Post and Email” have been expanded with an email distribution. cc|text module functionality can be used on each email distribution setup line to define the content to appear in the body of the email, including placeholder for address information, vendor names and document information. cc|formatted documents supplements the texts with special formatting possibilities, including text formatting options like bold, underline, italic and some colors, as well as importing images. For each email distribution, additional documents can be attached.

Generated emails can be tracked in the Email Distribution Entries page, which is accessible by clicking Show Email Distribution Entries on the ribbon of any page that uses the send email functionality.

## THE COSMO CONSULT PRODUCTS IN DMP

**cc|document configurator** takes the design of the printouts from the report development tools (Native Report Designer and Visual Studio) to a configuration

inside Dynamics NAV. This reduces the implementation effort required to get the printed documents ‘in shape’ and enables end users and consultants to do modifications without any programming skills. It comes with more than 20 predefined layout templates in more than 20 different languages that are ready to use. All layouts consider cc|text module and cc|formatted documents.

**cc|text module** provides users the ability to add extra textual information to records such as items, vendors, customers, resources, and G/L accounts, as well as to the master data of the manufacturing module and to the Dynamics NAV standard texts. These texts can be:

- ▶ Inserted as headers, footers and line texts in the purchase, sales, production and service pages and printed in predefined and customized reports.
- ▶ Displayed in predefined pages (system message) without being printed. They can be inserted manually or automatically.

It is also possible to define language-specific and date restricted text. Text can be configured for master data, such as items, customers and vendors. Texts for customers and vendors are copied according to the configuration into the header or footer of the document.

**cc|formatted documents** gives users the ability to enhance and improve the appearance of Dynamics NAV reports through the use of an integrated word processor directly in Dynamics NAV. In addition, any Dynamics NAV reports can be used as sub-reports. Through “copy & paste” from Microsoft Word or websites, the formatting is conveyed to the editor. Pictures are embedded into the text and stored without the need of an extra repository. The “Word Processing (with Line Conversion)” action translates the fully formatted text into text lines, to remove the mark-ups automatically and work with standard Dynamics NAV text handling.

**cc|dms** is used to share or store documents directly in Dynamics NAV and to provide easy access. Search-

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ing efforts are reduced by displaying only relevant files on a record. Reports can be automatically uploaded to save digital copies. The document box serves as a central filing location for documents in Dynamics NAV and allows to work in the familiar Microsoft environment. Documents can be filed quickly using the drag and drop functionality. It is possible to interact with the documents directly via the Microsoft Dynamics NAV interface and the associated functions can be used without restrictions in Microsoft SharePoint. Mobile staff or users without Dynamics NAV can access those files in SharePoint. The most important functions of the products

## THE MOST IMPORTANT FUNCTIONS OF THE PRODUCTS

### cc|document configurator:

- ▶ Design of reports in Dynamics NAV, without Visual Studio or Report Designer (possible in WebClient, TabletClient, MobileClient)
- ▶ More than 20 ready-to-use document layout templates in more than 20 languages
- ▶ Company specific document layouts, usage of phantom layouts across multiple reports
- ▶ Email Distribution with user-specific content and formatting possibilities
- ▶ Full implementation of text module headers, lines and footers (cc|text module)
- ▶ Automatic implementation of formatted content (cc|formatted documents)

### cc|text module:

- ▶ Boilerplates for header, line and footer texts
- ▶ Language, report and customer/vendor specific texts
- ▶ Inheritance of text to transaction data
- ▶ System messages (pop-ups) when creating documents
- ▶ Managing of formatted text (cc|formatted documents)

### cc|formatted documents:

- ▶ Formatted text processing in Dynamics NAV (e.g. pictures, mark-ups, Unicode, ...)
- ▶ Print of rich formatted texts in Dynamics NAV reports (e.g. with pictures!)
- ▶ Copy & Paste (incl. formatting) from websites, Microsoft Word and many more applications
- ▶ Modern Office design for intuitive user control

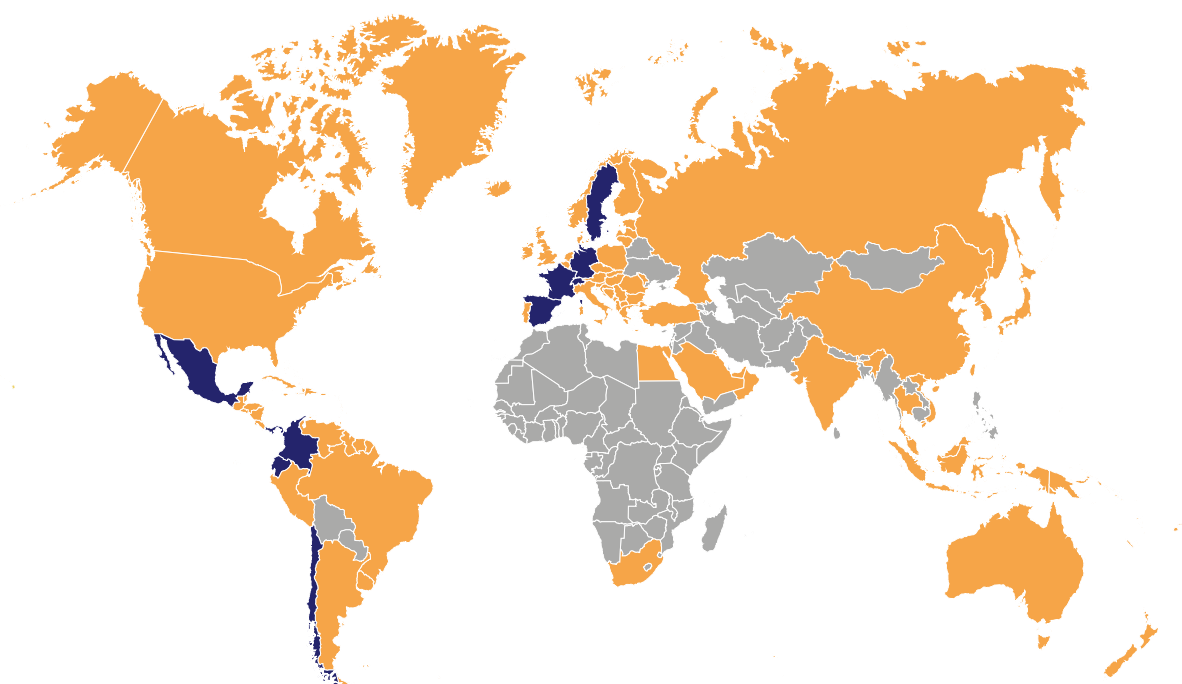
### cc|dms:

- ▶ DocumentBox to display and manage record relevant files in Dynamics NAV
- ▶ Saving/storing of files in SharePoint as document management system
- ▶ Automatic upload and metadata tagging of reports when posting or printing
- ▶ Configuration and installation only in Dynamics NAV, no installation of any components in SharePoint necessary

The products can be licensed stand-alone, but hold much more remarkable value in one solution.

Item Code	Description	Quantity	Unit Price	Tax Status	Total Price
1920-S	ANTWERP Konferenztisch	5 Stück	651,10	Ja VAT19	3.255,50
1896-S	ATHENS Schreibtisch	30 Stück	1.005,80	Ja VAT19	30.174,00
1908-S	LONDON Schreibtischstuhl, bla	60 Stück	191,00	Ja VAT19	11.460,00
Total EUR ohne MwSt.					44.889,50
19% MwSt.					8.529,01
Total EUR inkl. MwSt.					53.418,51

DMP ORDER REPORT



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