



Clever Document Links

Make it easier to store customer documents in Microsoft Dynamics 365 Business Central

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Ever wished you could store any file, email, image, spreadsheet, drawing or document directly in your Microsoft Dynamics 365 Business Central system with just a drag and drop?

Clever Document Links makes the compilation of customer records seamless. It is ideal for building a concrete profile of your customers prior to engaging with them.

Naturally, you will be able to deliver a greater level of customer service with a vast expanse of knowledge at your disposal.

Product Overview

Clever Document Links makes it easier than ever to store customer documents within Dynamics 365 Business Central. Simply drag and drop your file into the Clever Document Links Factbox to upload and store it against the appropriate record.

Benefits

- Securely store your documents in SharePoint or within your Dynamics 365 Business Central system
- Use an OCR service to recognise barcodes and suggest matching documents
- Assign attributes to linked documents to help manage and retrieve them

Requirements

Dynamics 365 Business Central Essentials or Premium



Make a Change for the better

With potentially hundreds of purchase orders flying in and out of your warehouse each day, adding information to purchase orders or sales orders, such as delivery notes can be a lot of administration.

Use Clever Document Links to enable a simple barcoding system. Linked directly to Dynamics 365 Business Central, your team can simply scan their delivery notes – and the documents will automatically be assigned and filed in the right place in Dynamics 365 Business Central.

No more paper-based admin, you can easily archive every document sent accurately and securely, cutting time wastage.

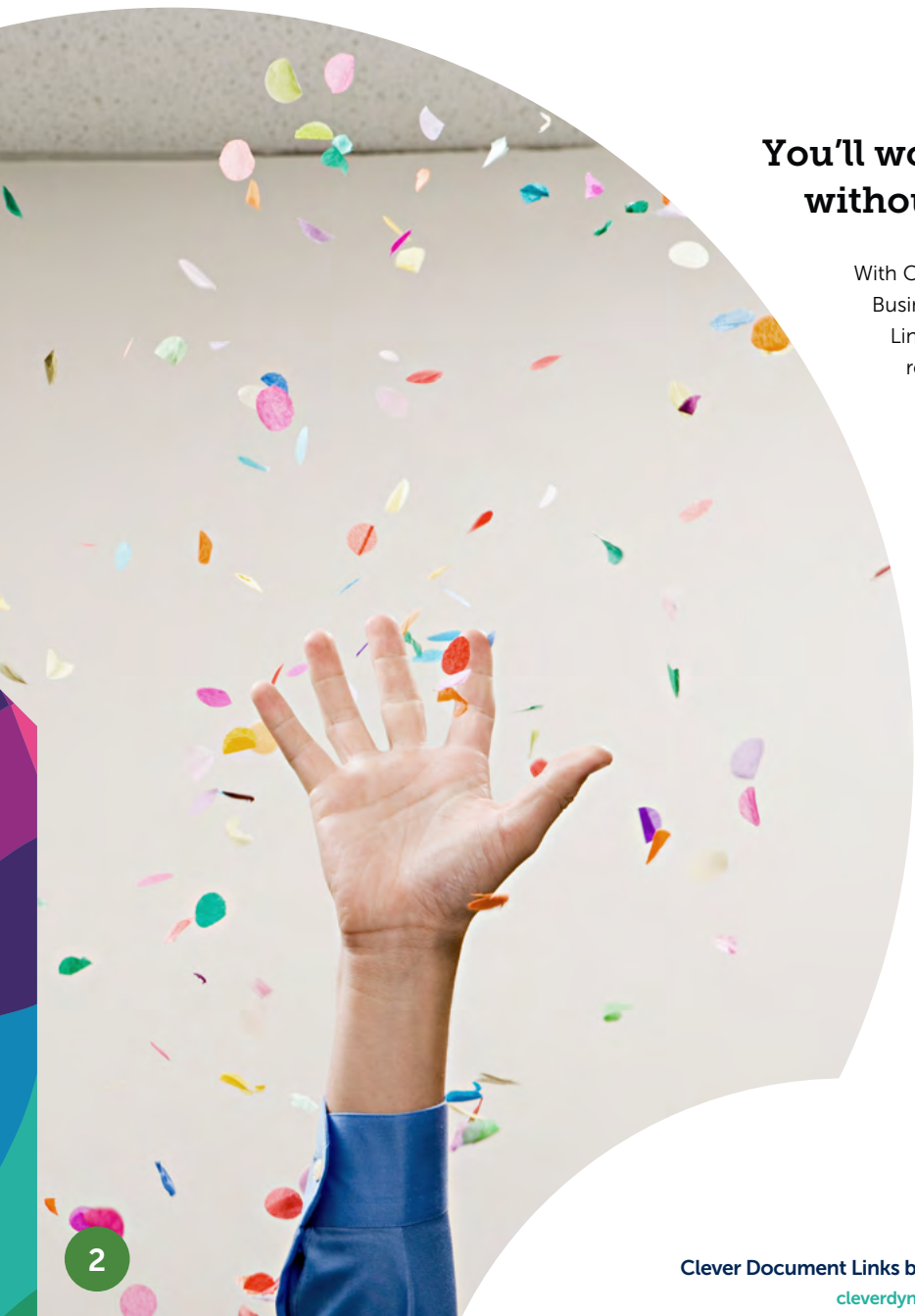


You'll wonder how you managed without it

With Clever Document Links and Dynamics 365 Business Central now you can. Clever Document Links adds that capability to all of the master records and transactions.

That means that the emailed purchase order can be dropped onto a sales order, an account application form can be stored against the customer or vendor, on the item you can hold any product information, images, drawing, costing or anything else you need.

Clever Document Links knows how the transactions work within Dynamics 365 Business Central so the link to that purchase authorization email, dropped against your sales document is passed through resulting invoices to the customer ledger entry so it's only a click away for your credit controller when they later are chasing the debt.





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