



ck.solution

automates your document workflow

## cks.DMS



### Digital Archiving for SAP Business One

Archive documents, e-mails and files digitally and in an audit-proof way

Digital archives (also called electronic archives) are more than just a low-cost alternative to the manual filing of documents required for tax and commercial law. They store information and make it easily accessible – both now and far into the future. With cks.DMS, you can manage and archive your documents easily from within the SAP Business One user interface and access archived information without switching between applications.

#### Archive your documents quickly and in an audit-proof electronic format

When archiving documents that are required for tax and commercial law, certain rules apply; most significantly, documents must be unalterable. When any change is made to an archived document, cks.DMS creates a new revision, which it archives alongside the 'original'. Every change is therefore traceable, step-by-step. NOTE: outgoing documents generated with SAP Business One are also saved to the archive automatically and in an audit-proof way.

#### Make information from documents and files available throughout the business

Documents are not always sent to the same part of the business where they are eventually processed. From start to finish, they often go via several different workstations. The information from digitally archived documents is available to practically every employee – if their SAP Business One access authorization allows – and can be processed independently by each employee from their location.

#### Find documents and information from any workstation in a matter of seconds

With cks.DMS, documents, e-mails and files can be archived behind business transactions and business partners. With a simple right-click, you can see all documents that are associated with the current data record – for business transactions and also the archived documents of each respective base document. You can also find and display information via a full-text search, which can be fine-tuned using wildcards and AND/OR operators.

Watch video!



| Function                                    | limited | professional | Description   |
|---|---------|--------------|---|
| Full text search                            | ✓       | ✓            | Search documents for specific search terms and text fragments.  |
| SAP Business transactions                   | ✓       | ✓            | Link documents directly with the SAP business transactions.   |
| Draft documents                             | ✓       | ✓            | Link documents with draft documents e.g. during the approval process.   |
| Automated assignment                        | ✓       | ✓            | QR codes allow recurring documents such as order confirmations to be assigned automatically to the posted SAP documents.  |
| GoBD compliant                              | ✓       | ✓            | Audit-proof archiving for your documents and e-mails.   |
| Audit-proof archiving of outbound documents | ✓       | ✓            | Outbound documents in SAP Business One are not usually archived in an audit-proof way. cks.DMS generates an unchanged document automatically and saves it in the archive. |
| Batch numbers and serial numbers            | ✓       | ✓            | Link documents with batch numbers and serial numbers.   |
| E-mail archiving                            | ✓       | ✓            | Export e-mails from your e-mail client and import them into the archive for revision-proof storage.   |
| Global archiving folders                    | ✗       | ✓            | Create different global folders and use them to archive documents that cannot or should not be assigned to an SAP object.   |
| Personal inbox                              | ✗       | ✓            | Move documents within the SAP structure to the relevant personal inboxes of employees for further processing.   |
| Integration of newly developed functions    | ✗       | ✓            | Receive newly developed functions that are added to cks.DMS free of charge and with the next update.  |
| Audit-proof archiving of SAP attachments    | ✗       | ✓            | Audit-proof archiving of attachments that have been added to an SAP document. Do this manually or automatically with cks.RUN.   |
| ZUGFeRD 1.0 & 2.0                           | ✗       | ✓            | Send and receive ZUGFeRD invoices up to format 2.0 and process them automatically.  |
| API-interface                               | ✗       | ✓            | Connect other applications to your electronic archive.  |
| Outlook Add-in                              | ✗       | ✓            | Move e-mails from Outlook directly into the archive.  |
| Custom developments                         | ✗       | ✓            | Adjust cks.DMS to your individual requirements.   |

