Succsess Story

DYNAMICS 365 / AX CONNECTOR FOR DOCUWARE

sudhoff technik
KOMPETENZ IN GUMMI & KUNSTSTOFF

Since 1936, sudhoff technik GmbH, headquartered in Ulm-Einsingen, Germany, has been supplying medium-sized and large companies with technical products. They range from rubber to plastics and occupational safety. They also have been providing highly qualified services in product development and toolmaking.

BACKGROUND:

Technical trade has a very high volume of documents. Every week, sudhoff needs to optimally index and archive 1,000+ documents. About half of them are offers, invoices, credit notes, etc. which employees have to access daily. These documents are provided from external sources or their own ERP system Microsoft Dynamics AX. The PDFs are manually indexed and tagged and then stored in Docuware archives in an audit-proof manner.

Since 2003, sudhoff has been using Docuware's document management system (DMS) for the legally compliant and digital storage and archiving of all documents and commercial records.

CHALLENGE

The challenge of this approach: With approximately one minute per document, manual indexing not only cost the employee a lot of working time – there is also no link between Docuware and the ERP system. Employees finding documents in Docuware do not simultaneously have access to the corresponding business transaction in AX. This parallel use of two systems costs sudhoff much time and money and complicates daily work.

Challenge for Sudhoff:

> Duration of manual indexing

> Missing connection between DMS and ERP

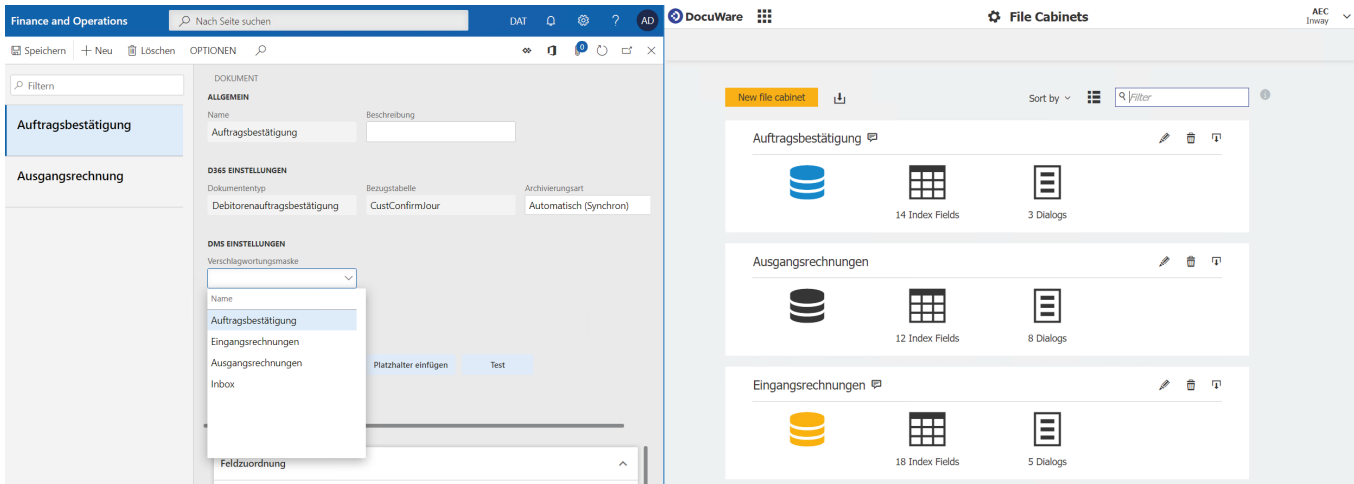> Parallel working in two systems

SOLUTION:

As an ERP partner, Inway Systems developed an individual solution for sudhoff shortly after the introduction of Docuware. The interface automatically transfers all documents created in AX to the Docuware archive, including complete tagging.

In 2010, this individual solution became the official add-on "Dynamics 365 / AX Connector for Docuware" which has been continuously improved.

In addition to outgoing documents (offers, order confirmations, delivery notes, invoices, credit notes, etc.), incoming documents (incoming invoices, incoming delivery notes, etc.) not created in the ERP system can also be automa-

tically archived and linked to the corresponding booking process in Microsoft Dynamics AX / 365.

> Outgoing invoices, delivery notes, order confirmations are displayed with the order and customer
> Product data sheets are displayed in the article master and with the order item
> Incoming invoices and delivery notes are displayed with the purchase ordered and supplier – and workflows such as the checking of purchase invoices are automatically initiated
> Instantaneously, it is possible to send outgoing and receive incoming documents directly in the AX client.

A further advantage of the Dynamics 365 / AX Connector for Docuware is that adaptations such as the customized configuration of buttons are possible without programming. Sudhoff utilized this option to avoid unnecessary back and forth between ERP and DMS any longer.

CORE FUNCTIONS:

> Fully automatic filing
> Display documents without leaving Dynamics AX / D365
> Display of external documents, i.e. documents not created in the own ERP

> Completely cloud-based solution
> Adjustment without programming as customized buttons can be gauged on any mask
> No required printer switch, third party or interface software

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