

Spotlight - Document Management

Preparation if using the provided demo data

1. Import Demo Data
2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99
3. Have an official HansaWorld Marketing Document in PDF format on your desktop to attach to Quotation

Preparation for creating your own demo data

1. Download the latest UK version and import Sample data
2. Duplicate an existing Quotation, select Class W, Click on 'Accepted' and Save it.
3. Create an email from the Quotation.
4. Create a workflow activity from the Quotation, give it a fitting title and save.
5. Create an Order from the Quotation, Ok & save it.
6. Create an Invoice from the Quotation.
7. Drag and drop the Quotation you created onto your Personal Desktop
8. Have an official HansaWorld Marketing Document in PDF format on your desktop to attach to Quotation

Standard ERP offers easy access to all documents related to your business transactions. For example, lets look at a quotation to see how we can follow the sales process

ACTION: Select the Quotation Nr 21100023 (or quotation created) on your Personal Desktop

Notice that it has a highlighted paperclip and links icon so I can open them to view all attachments.

ACTION: With the cursor circle the Workflow Manager, Link Manager and the Document manager

These records were automatically linked to the quotation when it was processed.

ACTION: Select Link Manager and show the linked records

For example, we can open the reminder activity which was created for the sales person to follow up, by selecting the Workflow Manager.

ACTION: Select Workflow Manager, then open the activity shortly. Close the activity.

On the Link Manager, we can also see the email that was sent to the customer, as well as the Order and the Invoice which were created from it.

ACTION: Select Link Manager, open email and close, open Order and close, open Invoice and close

Additionally you can also attach any files to this quotation from the operations menu or simply by dragging and dropping them from your computer.

ACTION: Select Hide Background button, and drag and drop external file to Quotation paperclip

With the document link and attachment functionality in Standard ERP you have all the necessary information right at your fingertips.