

# cERP Docs

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Document Management in cERP

contract  ERP  
a COMPUSOFT product

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# Meet your presenters



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Manager of Client Services



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Project Lead

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# Agenda

- 1 Who is cERP Docs?
- 2 What is cERP Docs?
- 3 When can I use cERP Docs?
- 4 Where is cERP Docs?
- 5 Why use cERP Docs?



# Who is cERP Docs?

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contract   
a **COMPUSOFT** product

 **Datahaven**™  
Paperless Redefined™

## cERP Docs is:

- Partnership between Access IT & Torrential Data Solutions
- Combining the power of Datahaven with cERP/BC
- Developed specifically for cERP with our clients' needs in mind

# What is cERP Docs?

SO-001473 · BAY SHORE CONSTRUCTION

Home Process Lump Sum Billing Ship Posting Prepare Print/Send Navigate More options

**General** Show more

No.	SO-001473	Posting Date	10/8/2021
Customer No.	BASHCO	Document Date	10/8/2021
Customer Name	BAY SHORE CONSTRUCTION	Order Date	10/8/2021
Contact	Reese Summers	Requested Date	
<b>Sell-to</b>		Customer PO No.	
Address	1705 HAND AVE.	Salesperson Code	AG
City	Bay Minette	Project Manager	AG
State	AL	Quote No.	
ZIP Code	36507	Status	Open
Contract No.		Project Quote No.	
Order Instructions		Install Line Exists	No
Job Name		Exclude from Usage	<input type="checkbox"/>

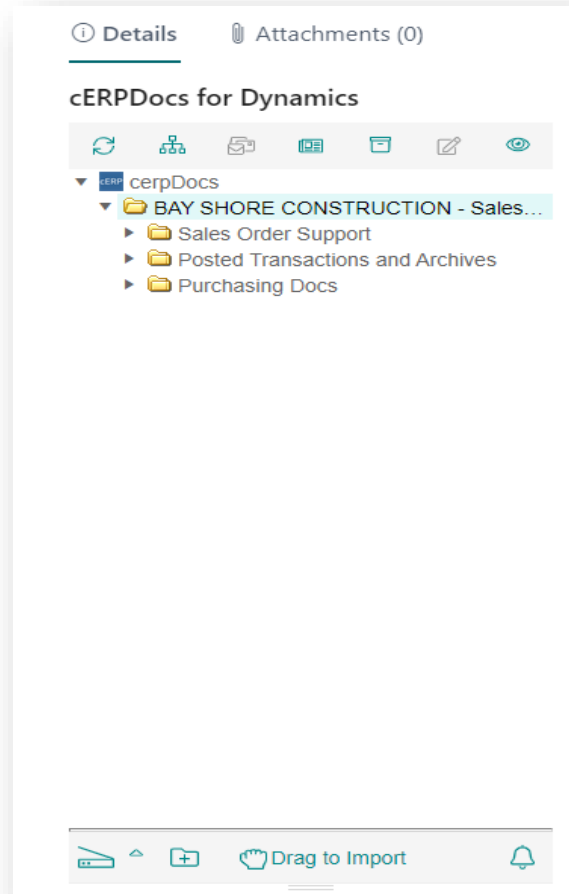
**cERPDocs for Dynamics**

- cerpDocs
  - BAY SHORE CONSTRUCTION - Sales...
  - Sales Order Support
  - Posted Transactions and Archives
  - Purchasing Docs

## cERP Docs is:

- Document Management Solution
- Fully embedded in BC/cERP
- Affordable
- Robust
- Easy to Use

# When can I use cERP Docs?



## Use cERP Docs to:

- Drag & Drop external attachments
- Capture Docs from cERP
- Batch Send Invoices & Statements
- View files associated to a record

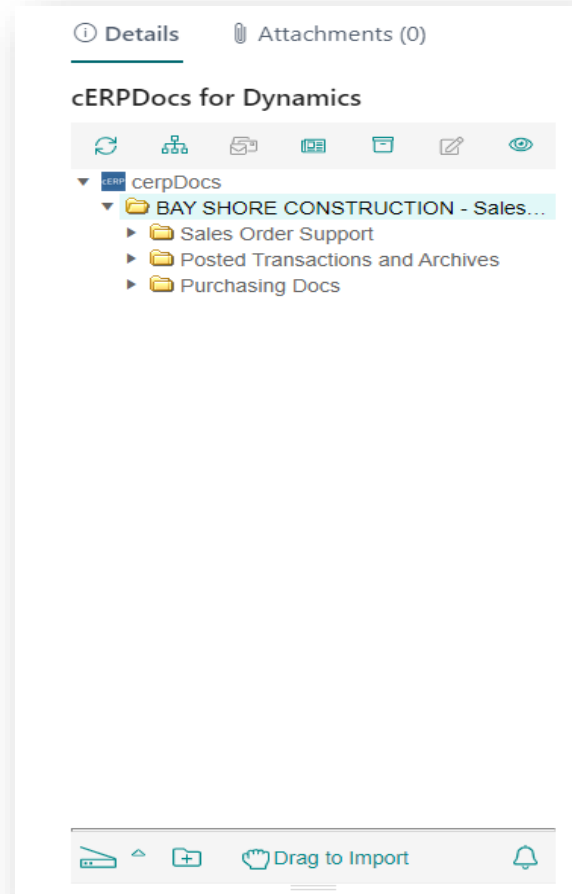
# Where is cERP Docs?

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## cERP Docs is Everywhere you Need it:

- Customer Card
- Customer List
- Vendor Card
- Vendor List
- Sales Quote Card
- Sales Quotes List
- Sales Order Card
- Sales Order List
- Sales Credit Memo Card
- Sales Credit Memos List
- Purchase Order Card
- Purchase Order List
- Purchase Invoice Card
- Purchase Invoice List
- Posted Sales Shipment Card
- Posted Sales Shipment List
- Posted Sales Invoice Card
- Posted Sales Invoice List
- Posted Sales Credit Memo Card
- Posted Sales Credit Memo List
- Posted Purchase Receipt
- Posted Purchase Invoice
- Posted Purchase Credit Memos
- Sales Return Order Card
- Sales Return Order List
- Purchase Return Order Card
- Purchase Return Order List
- Posted Return Shipment Card
- Posted Return Shipments List
- Posted Return Receipt Card
- Posted Return Receipts List
- Purchase Order List
- Purchase Invoices
- Contract Card
- Active Contract List
- All Contract List
- Shop Order List
- Shop Order Card
- Posted Shop Order List
- Posted Shop Order Card
- Work Order List
- Work Order Card
- Posted Work Order List
- Posted Work Order Card

# Why use cERP Docs?



## Use cERP Docs to:

- Increase efficiency
- Enhance visibility
- Reduce human error
- Provide standard folder structure in “digital” job file
- Track history of documents



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# Show & Tell



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**Questions?**

