Spotlight – Document Management

Preparation if using demo data attached

1. Import Demo Data

2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99

3. Drag and Drop Quotation Record 21100019 to your Personal Desktop (if not there yet)

4. Have a pdf Marketing Document on your desktop to attach to Quotation

Preparation for creating your own demo data

1. Import Demo Data

2. Create Quotation Record

3. Create email from Quotation Record

4. Create workflow activity from Quotation

5. Create Sales Order from Quotation + Ok Order

6. Create Invoice from Quotation

7. Drag and drop Quotation Record created to your Personal Desktop

8. Have a pdf Marketing Document 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 Quotation 21100019 (or quotation created) on Personal Deskt

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

ACTION: Show cursor on Workflow Manager, Document Link Manager and the Paperclip

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

ACTION: Select Link Manager and show cursor on records linked

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 activity, close activity.

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

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.