Complete integration of ArchivistaDMS & ArchivistaERP
Egg, Switzerland, 11 June 2015: *Updated versions of ArchivistaDMS and ArchivistaERP are now available. Both products now work seamlessly together in the basic configuration, thus eliminating the need for individual adjustments. The following blog post highlights the possibilities of using ArchivistaERP in connection with ArchivistaDMS.*

From individual pathways to automated integration
ArchivistaDMS and ArchivistaERP have existed side-by-side on the ArchivistaBox for many years. Since 1998, ArchivistaDMS has offered standardised interfaces for automated processing of documents from ERP solutions. Likewise, thanks to its PDF functionality, ArchivistaERP has so far been able to transfer documents to ArchivistaDMS. Automatic indexing has also been available since 2008 (see cust-folder and then erp-folder).

Until now, automated access to vouchers from ArchivistaERP to ArchivistaDMS had not yet been realised. With the ArchivistaBox 2015/V, the integration of ArchivistaERP with ArchivistaDMS will be fundamentally enhanced and simplified. Everyone knows that the best solution is the one that users do not even notice in the background. Therefore, as we present the new features here, it is obvious from the length of the blog post that the implemented solution is extremely simple.

Setting up ArchivistaERP for ArchivistaDMS
In the current version, under "Set up" and "Preferences", ArchivistaERP recognises several new fields under "ArchivistaDMS":

ArchivistaDMS	
Database for archival and retrieval:	archive827
Processing (Job, optional):	
Field for address number:	AdrNr
Field for address name:	AdrName
Field for document number:	DocNr
Field for document type number:	TypNr
Field for document type name:	TypName

This screen contains the settings for connecting ArchivistaERP to ArchivistaDMS. In the first field, the requested database for ArchivistaDMS is defined. The second field defines the scan definition, which is optional. The other fields specify the field names that are to be used in ArchivistaDMS for archiving or indexing.

Important: Users in the ArchivistaCloud complete the registration process again. All the settings are thereby automatically applied.

Archiving an order or invoice

All vouchers printed from ArchivistaERP are automatically filed in ArchivistaDMS. A voucher that is printed multiple times only ends up in ArchivistaDMS if changes were also made to the document before printing. An ERP connection to a document management system (DMS) could not be any easier.

Customer (DMS):	Meili + Co (1)
Branch:	Urs Pfister ▼

Accessing vouchers in ArchivistaDMS from ArchivistaERP

Archived vouchers can be accessed directly from ArchivistaERP. Wherever the **"DMS"** link appears in ArchivistaERP, a direct query for ArchivistaDMS can be submitted by clicking on this link.

The requested vouchers are thereby automatically activated in ArchivistaDMS:

Note: *For functional access, there must be an open session in ArchivistaDMS.* Customers are indexed in Archivista using their customer name and customer number. The corresponding list entries are automatically stored in ArchivistaDMS and are made conveniently available for searches:

AddrName	m
TypNo	Meili + Co
	Money Makers Ltd.
TypName	Muster AG
Note	

Incidentally: If a customer record is changed in ArchivistaERP, ArchivistaDMS is automatically updated. Further, the drop down menus are also available for document types:

TypName	sa
Note	Sales Invoice
	Sales Order

This ensures fast, easy and uncomplicated access from ArchivistaERP via the **"DMS"** button as well as separate access in ArchivistaDMS.