Nereid DMS Presentation

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# Intro

Microsoft Dynamics CRM out of the box focuses on Sales, Marketing, and Service (help desk) sectors, but with its proprietary (.NET based) framework it can be customized to meet many different demands. CRM however lacks entity-associated document management which can be compensated by using SharePoint Foundation document management facilities. Our solution ties up both systems leveraging shared domain-controlled security giving rich set of document managing features to CRM.

# Intended Customer Base

* Banks
* Financial companies
* Governments
* Real estate
* Medical institutions

# Features

* Seamless CRM integration
* Intuitive user interface
* Multiple CRM entities supported
* Basic support of text/document file types including PDF
* Extended support of Microsoft Word 2007, 2010
* Word document templates
* Template and template document structure management
* Conditional Word document blocks
* Bidirectional document relation via barcodes
* Domain-controlled security transparent for end user
* jQuery-powered UI
* UI localization

# Technologies

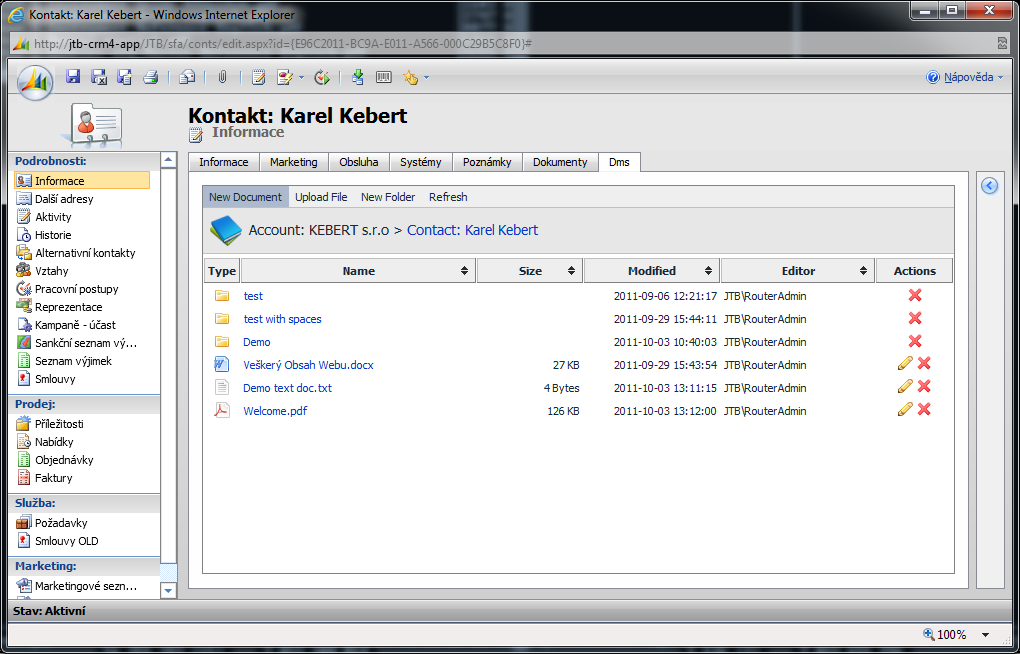
* .NET
* ASP.NET
* jQuery
* MS CRM SDK
* MS SharePoint SDK
* MS SQL

# Servers/Software

* MS Dynamics CRM 4.0
* MS SharePoint 2010 Server (Foundation is sufficient thus installation costs can be reduced)
* MS SQL Server
* MS Office 2007/2010
* Optional: Document scanning solutions with barcode recognition and SharePoint importing features for bidirectional document binding (eg. Kofax Express <http://www.kofax.com/journal/index.php/tag/bar-code-indexing/>)

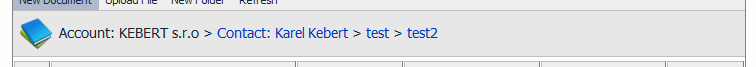
# Features in detail

## Documents and Folders

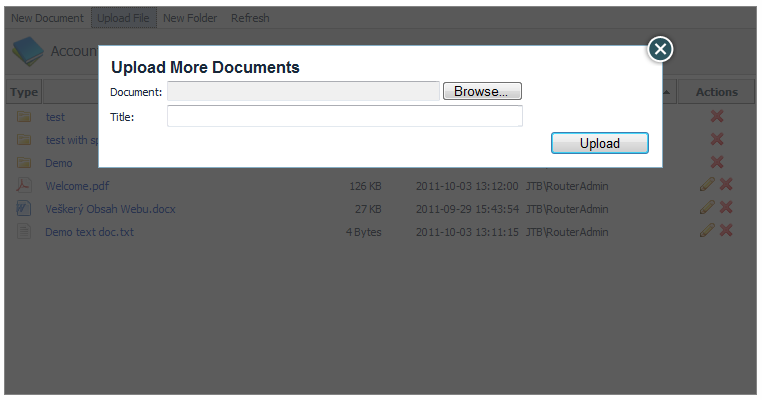


Picture : Main view

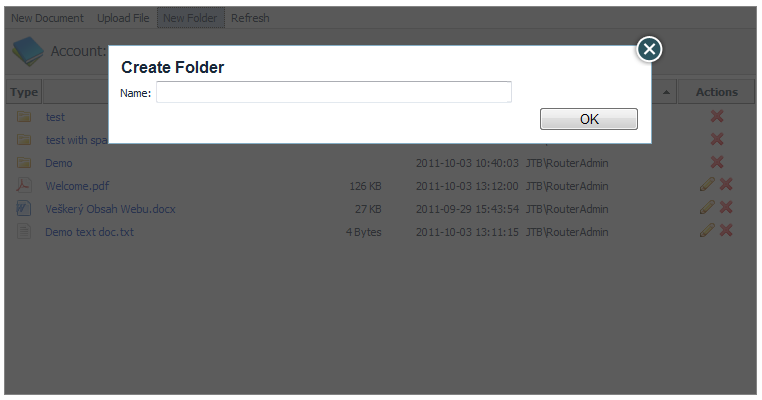
* Document/folders list
* File types indicated by corresponding icon
* Essential file information (size, modified by, modified time)
* Basic document management actions (edit, delete)
* Intuitive jQuery-powered UI
* Document list sorting by one or multiple columns
* Menu containing document structure commands
* “New Document” submenu contains entity-associated document types



Picture : Navigation bar



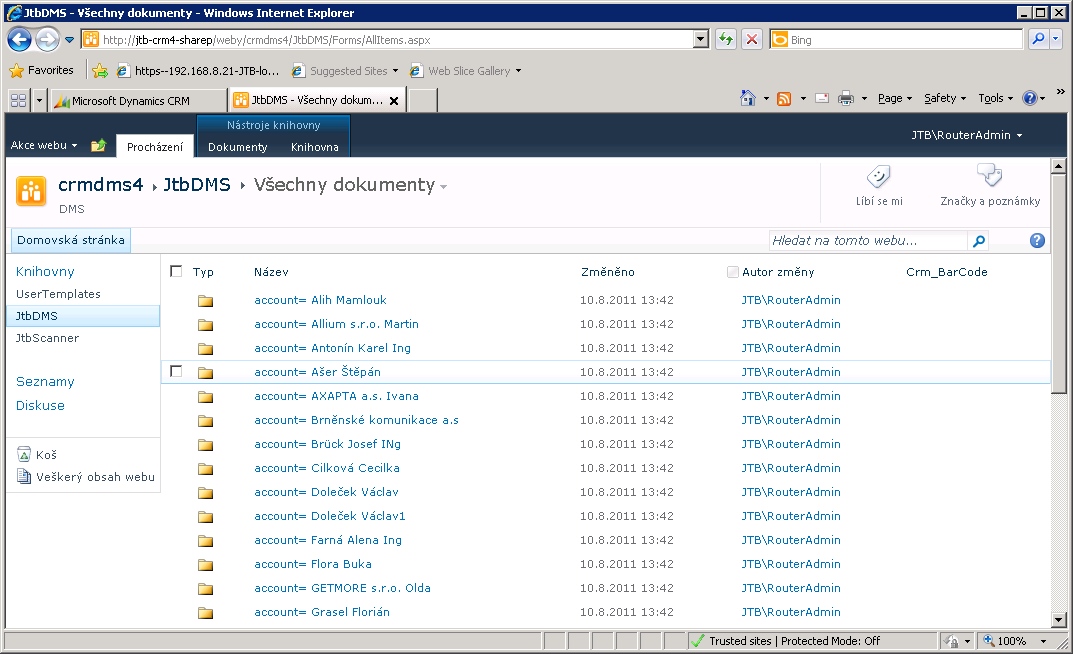
Picture : Upload document dialog



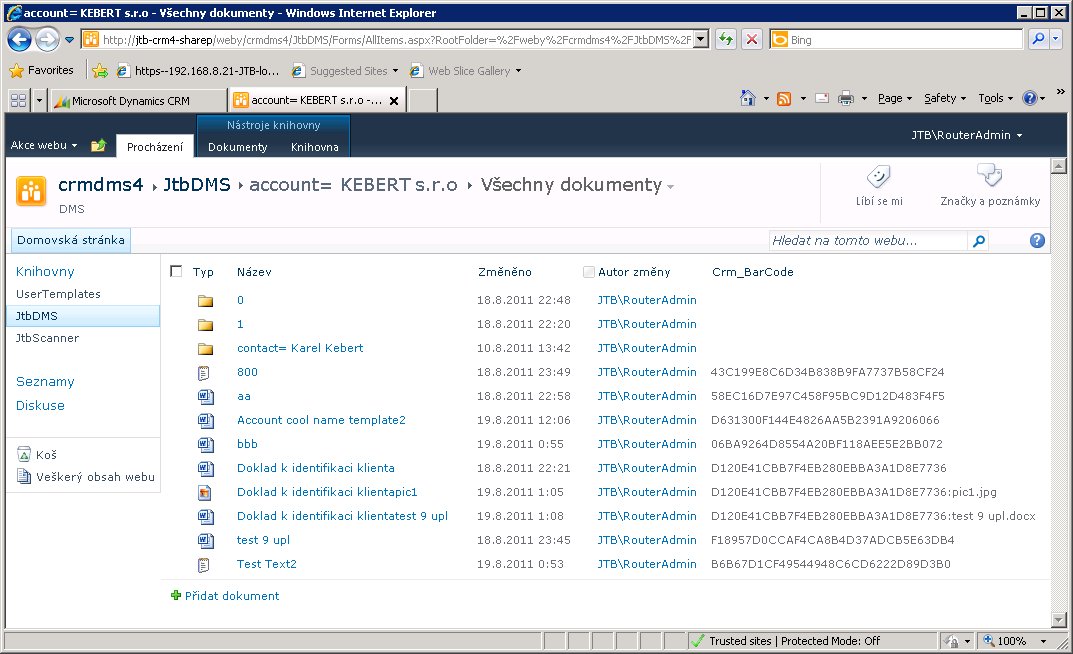
Picture : Create folder dialog

## SharePoint Containers

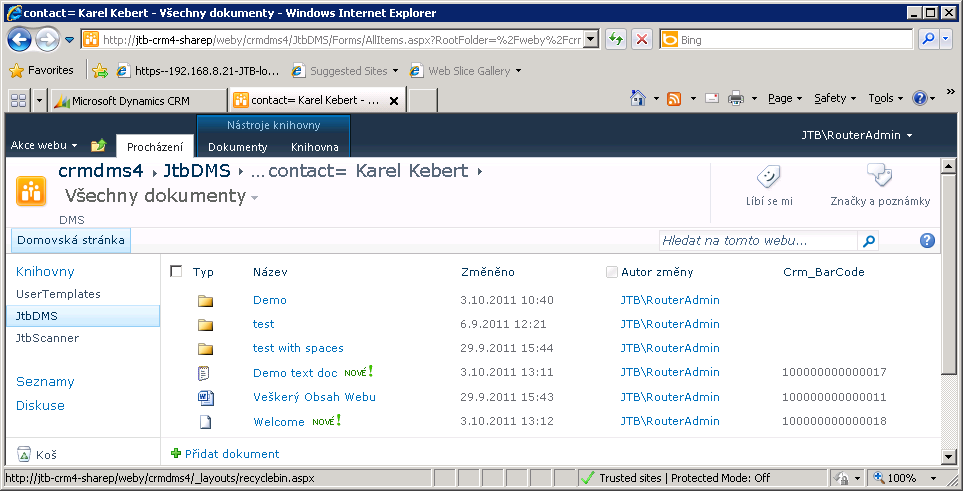
### DMS Document Library



Picture : DMS document library – top level

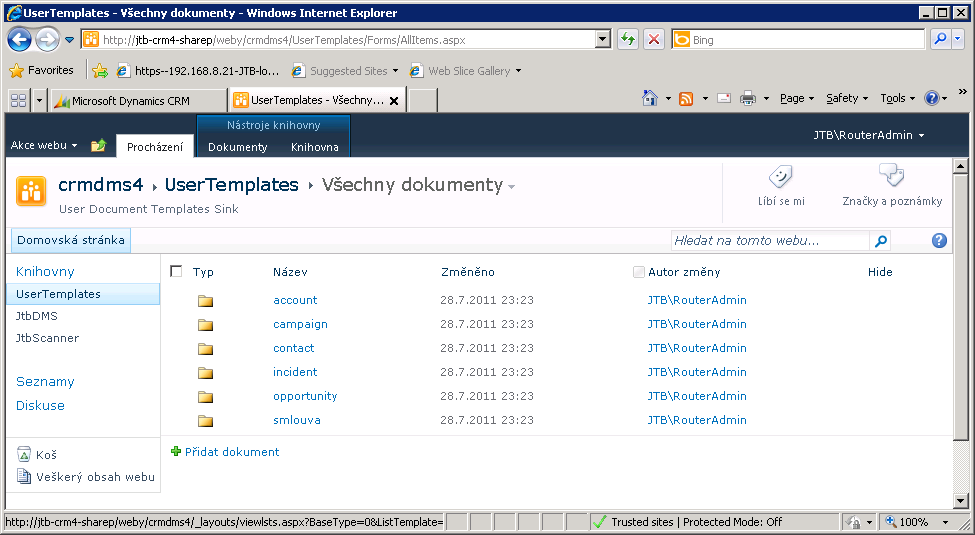


Picture : DMS document library – account-entity level

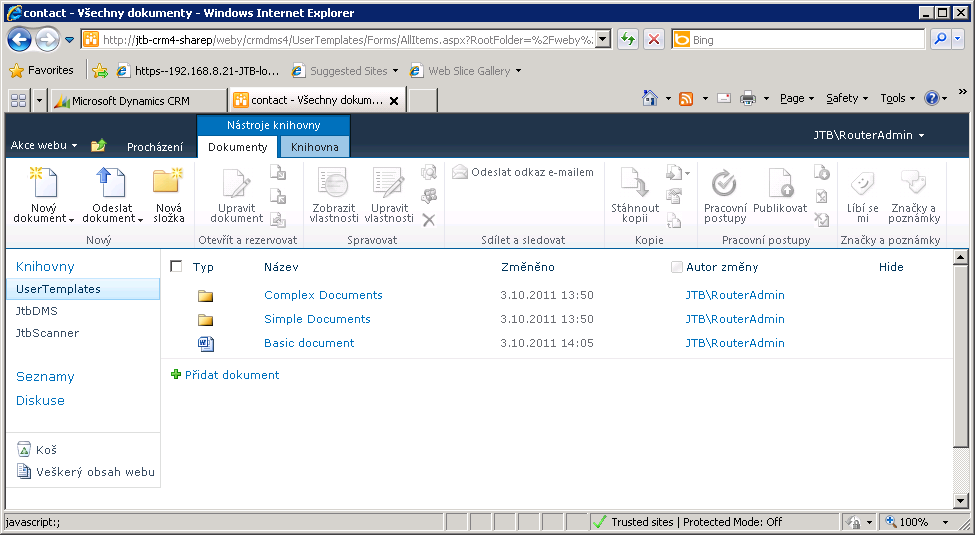


Picture : DMS document library – contact-entity level

### Template Sink Document Library

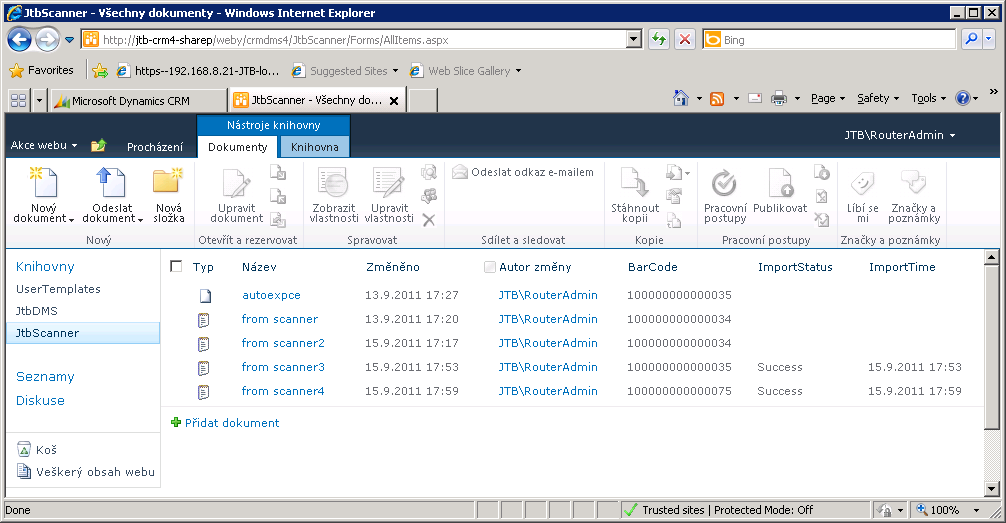


Picture : Template sink – top level



Picture : Template sink – entity level

### Scanner Sink Document Library



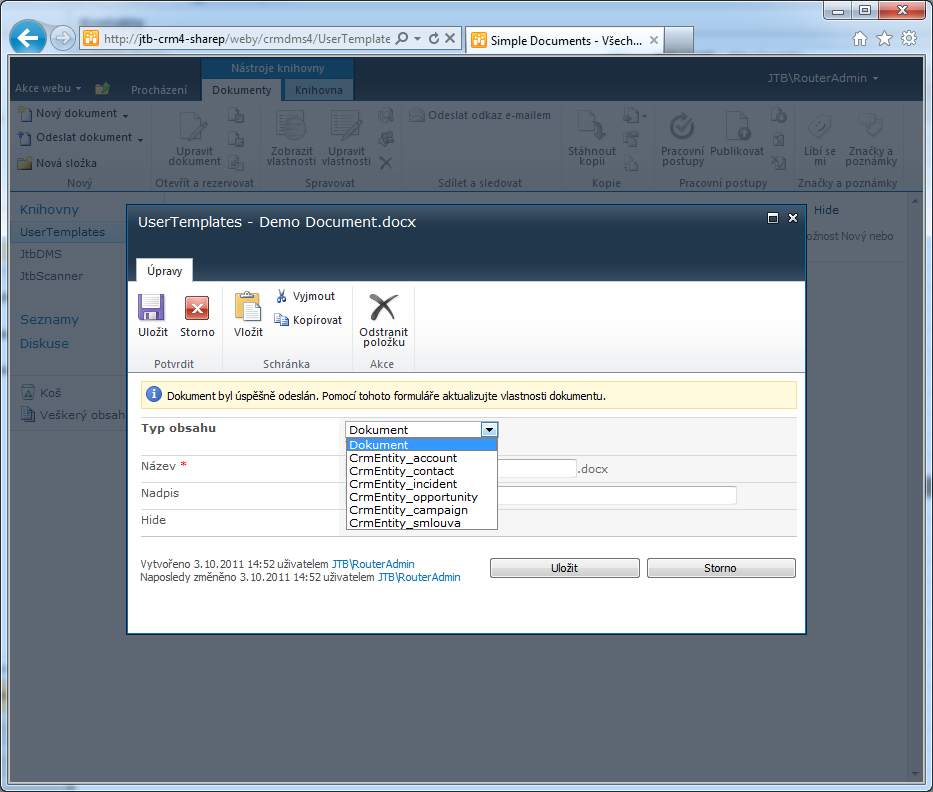
Picture : Scanner sink

## Templates

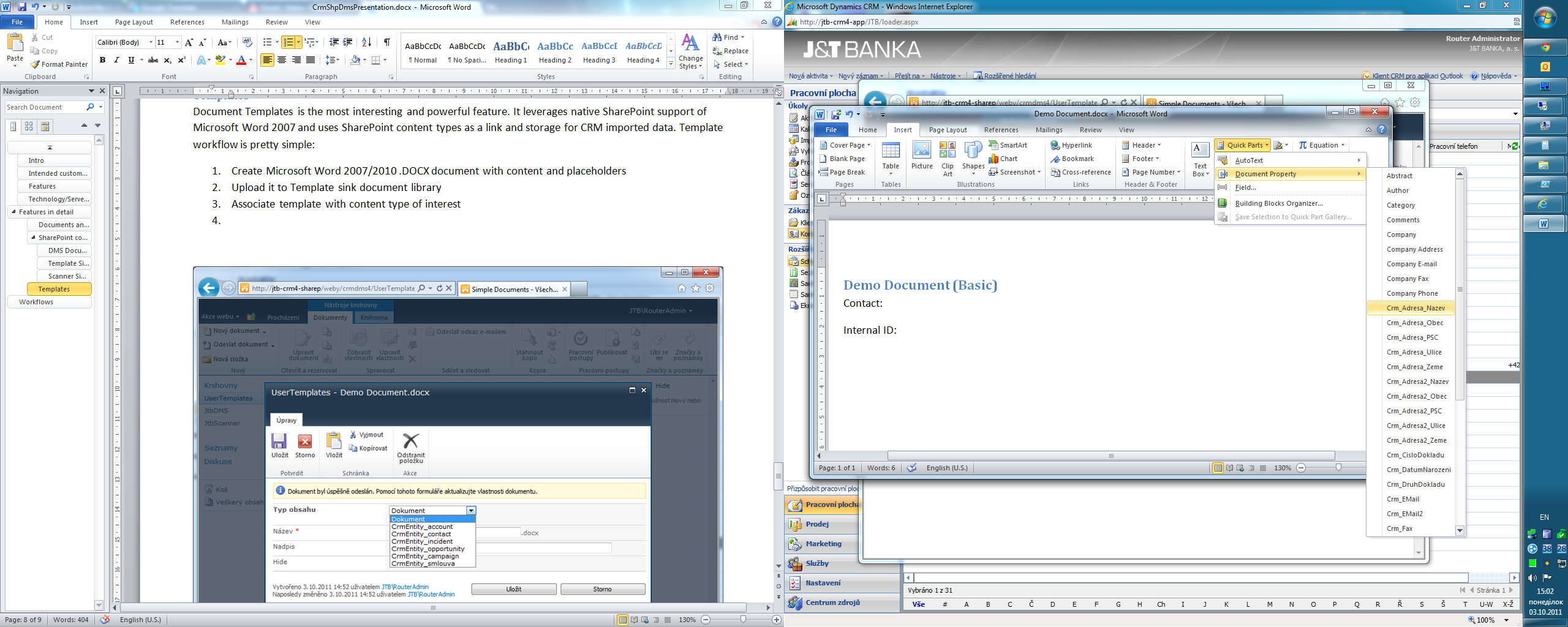
Document Templates is the most interesting and powerful feature. It leverages native SharePoint support of Microsoft Word 2007 and uses SharePoint content types as a link and storage for CRM imported data. Template workflow is pretty simple:

1. Create Microsoft Word 2007/2010 .DOCX document with content and placeholders
2. Upload it to Template sink document library
3. Associate template with content type of interest
4. Open uploaded document directly from SharePoint and put SharePoint field placeholders

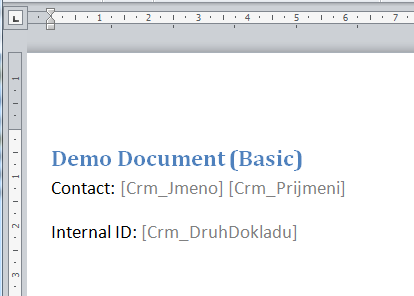
### Base Features



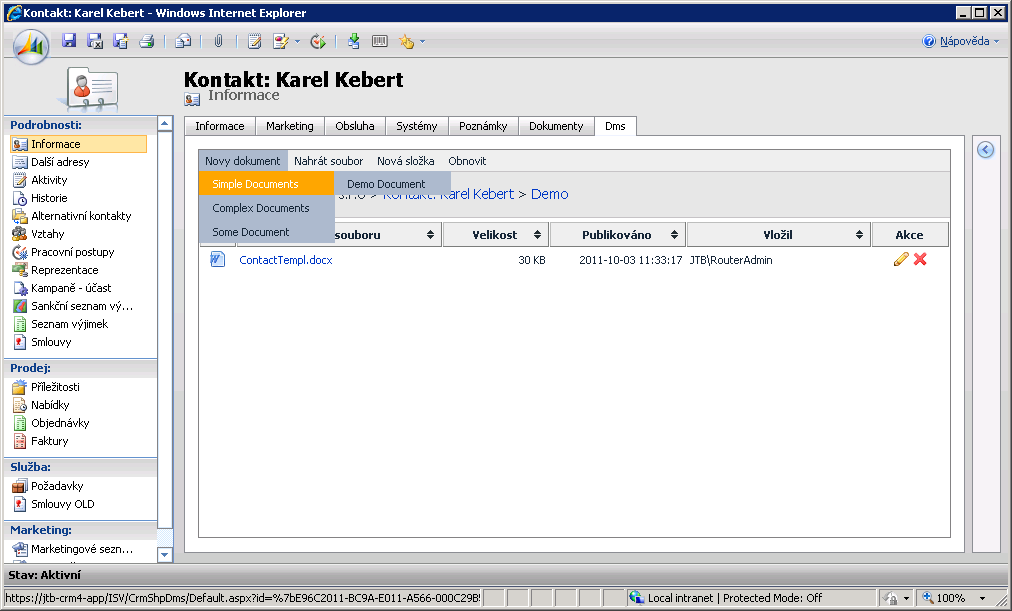
Picture : Uploaded template associated with CRM entity



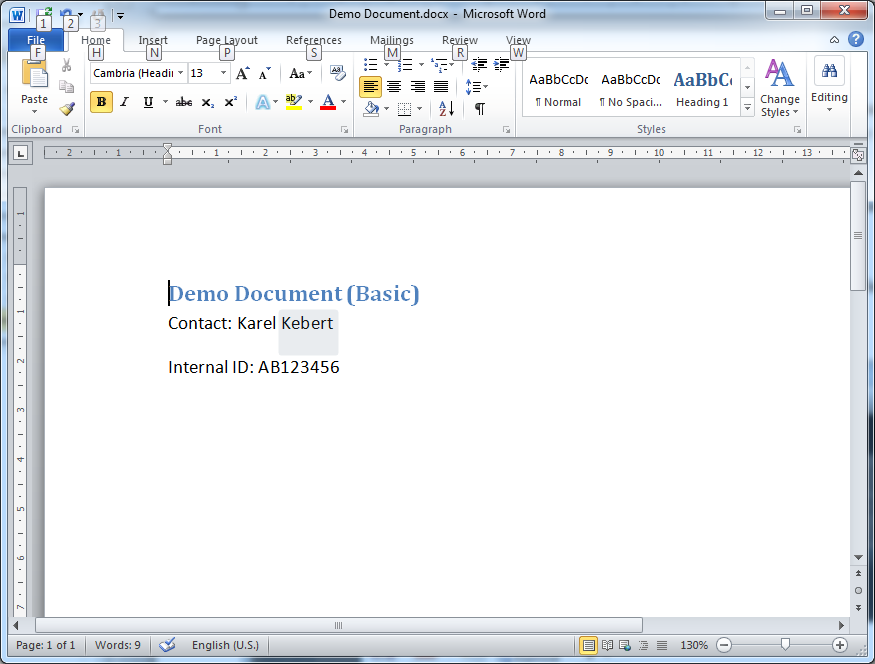
Picture : Insertion of SharePoint field placeholders into template document



Picture : SharePoint fields placeholders

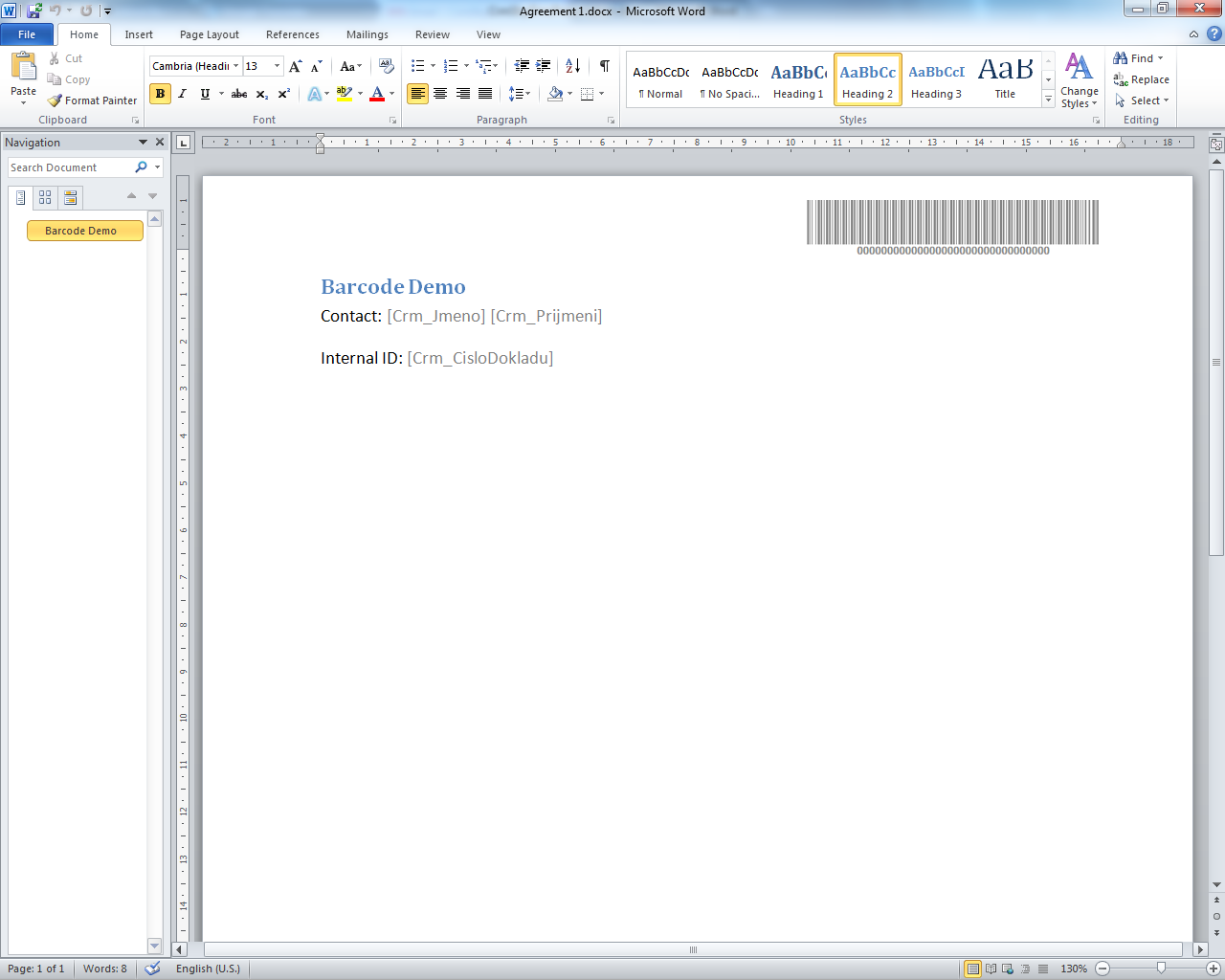


Picture : Template file structure is reflected to “Create Document” menu sub-tree

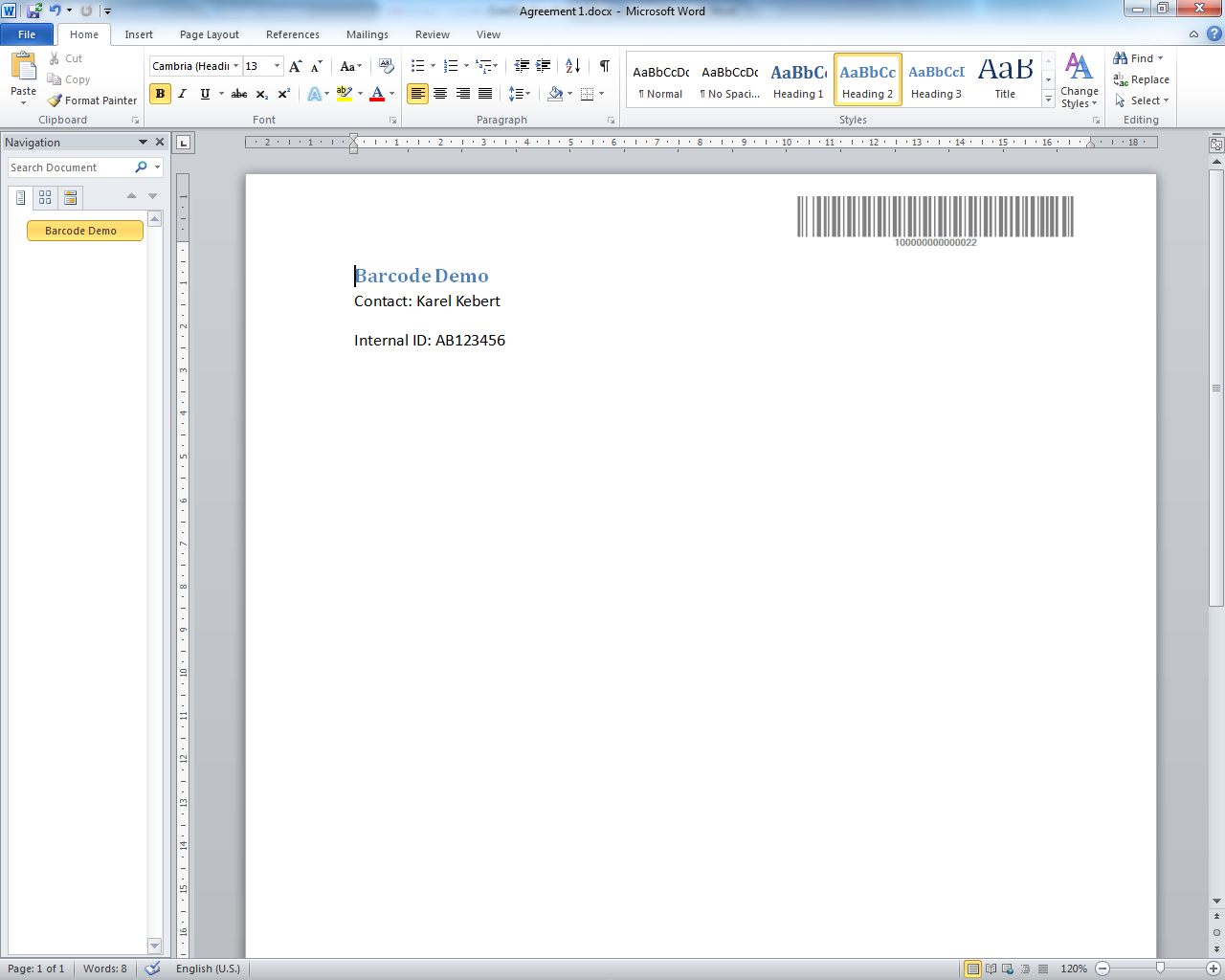


Picture : Created document with data imported from CMS

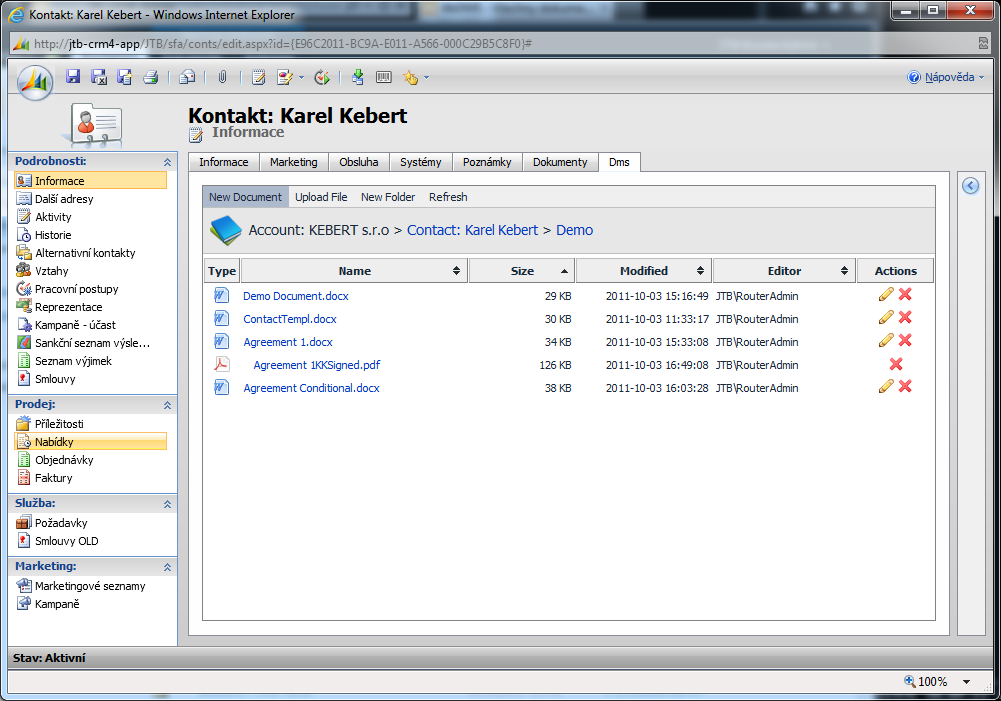
### Barcode in Template



Picture : Document template with barcode image placeholder



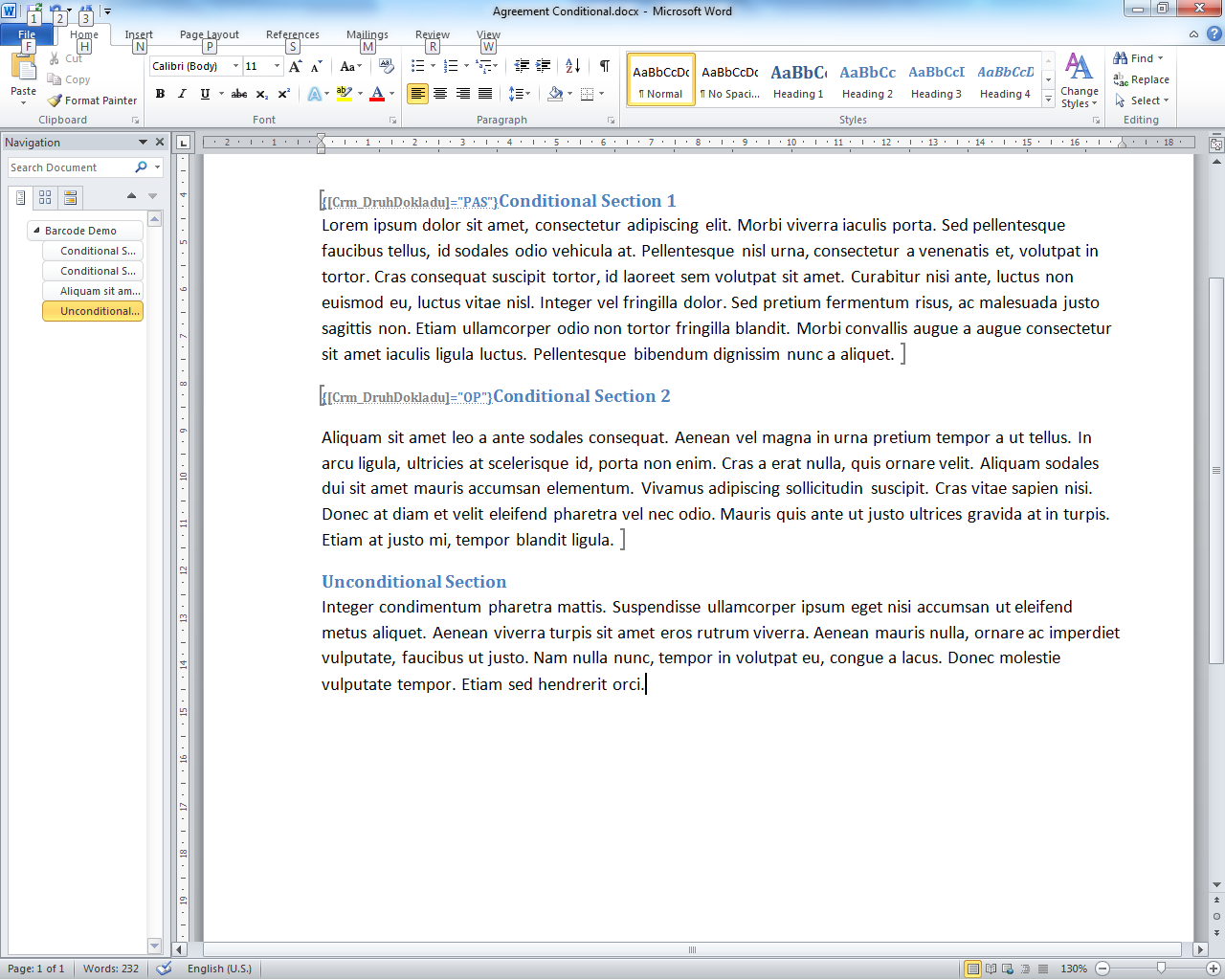
Picture : Barcode unique in scope of solution is embedded into document header



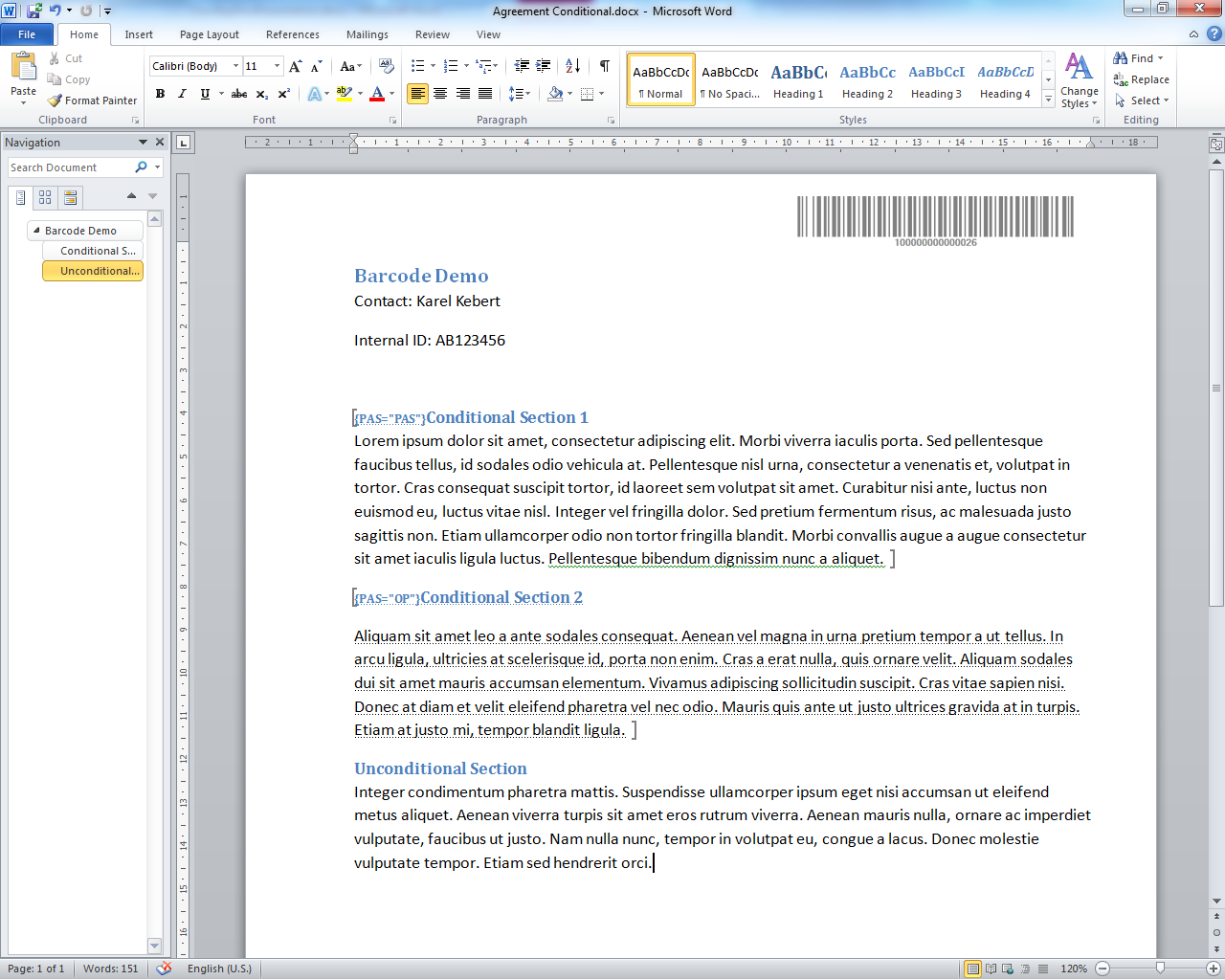
Picture : Documents imported from scanner are connected to their original document and are shown indented

### Conditional Document Blocks

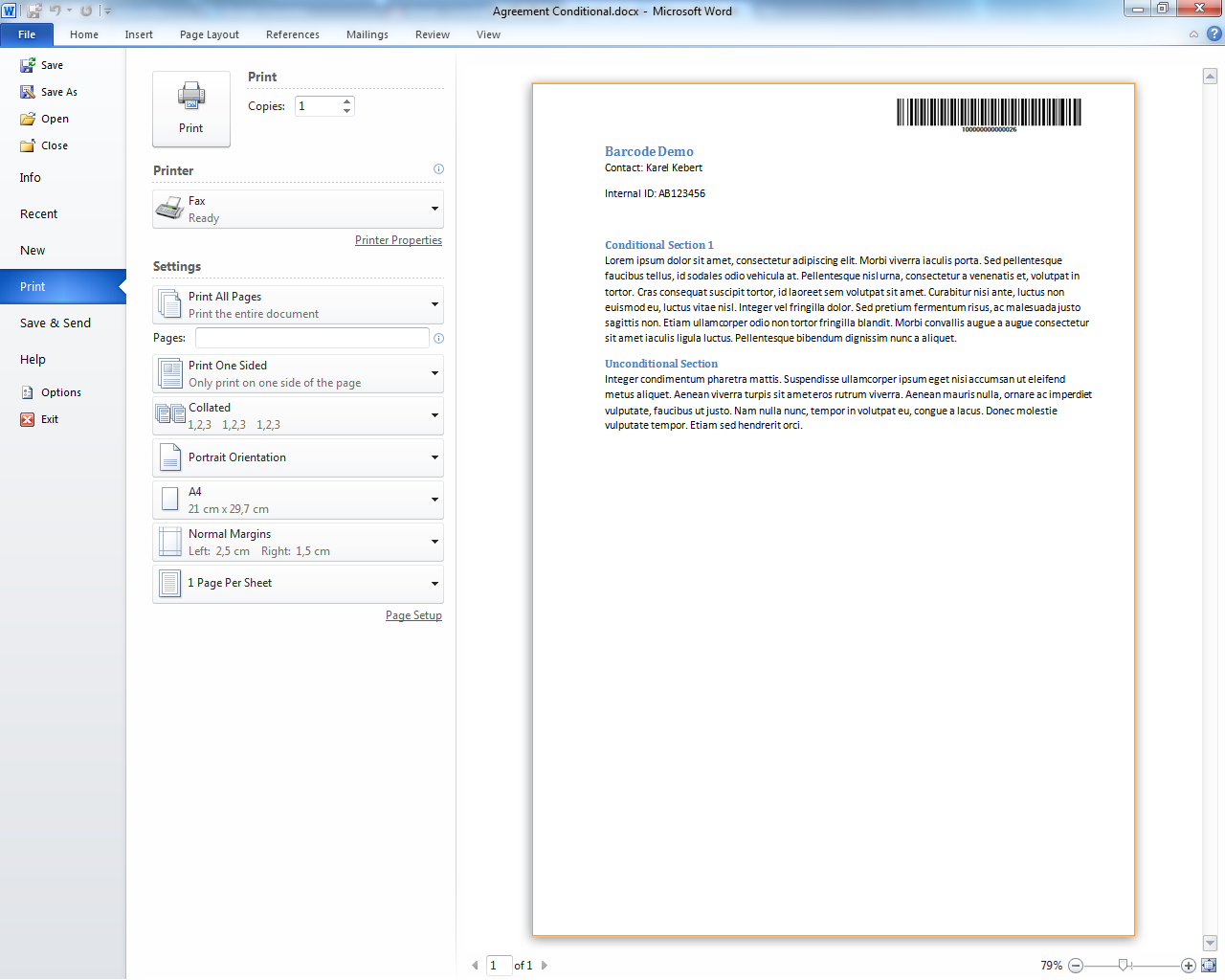
Conditional document blocks allow including or excluding document certain sections depending on data imported from CRM. End document is customized on creation phase automatically. This feature leverages MS Word bookmarking and hidden text features combined with application-evaluated expressions. Blocks which are excluded are not removed but hidden, this way document integrity is not compromised and in case of manual editing authors could change generated documents’ excluded content back to visible if necessary.



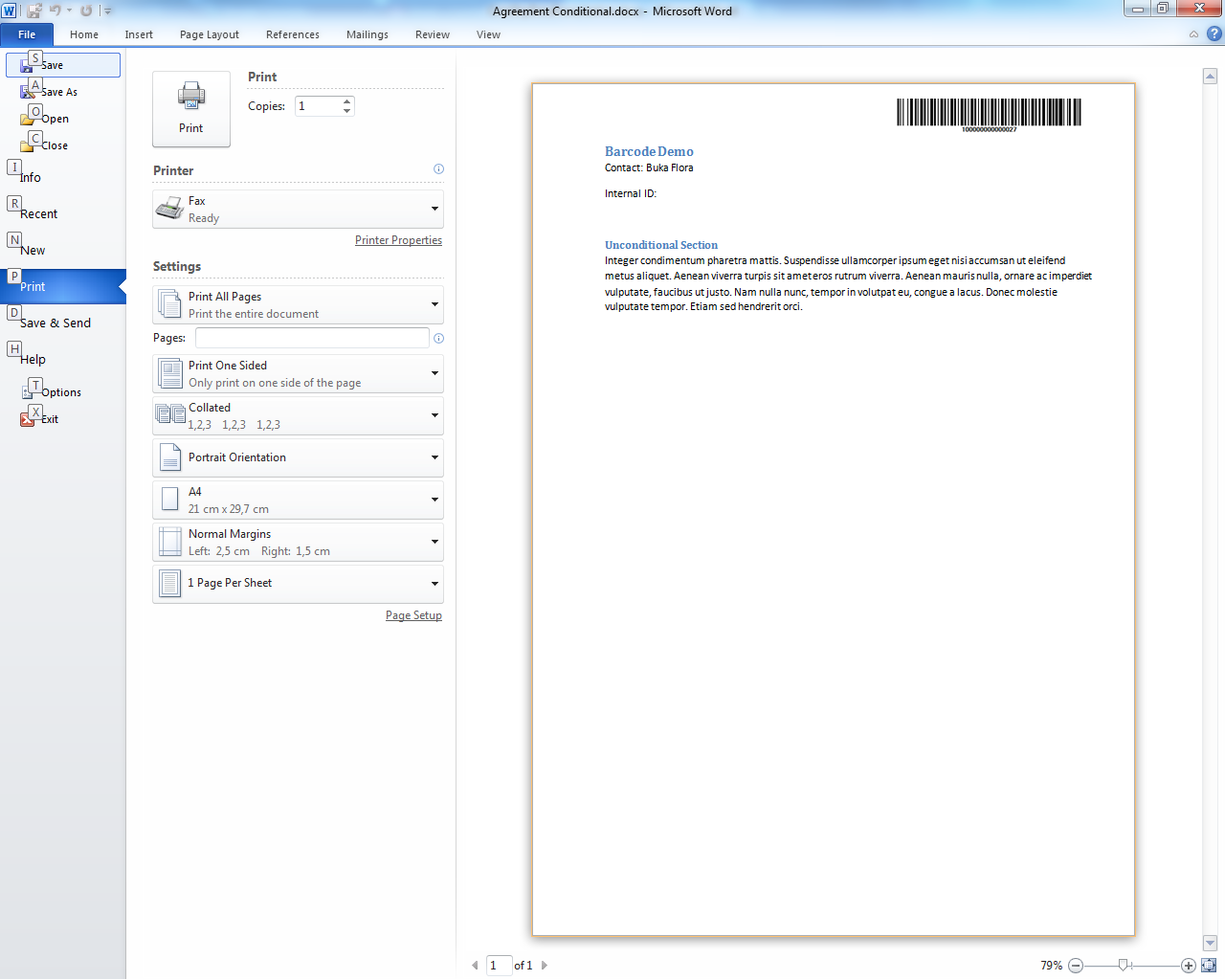
Picture : Conditional blocks in template



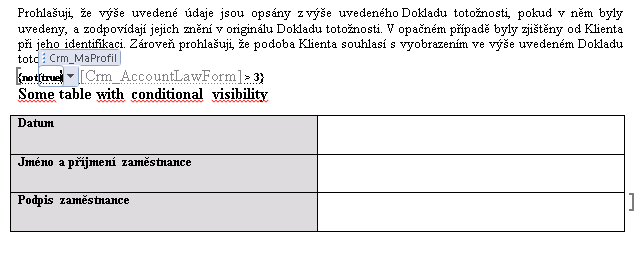
Picture : Section with expression evaluated to false is hidden (hidden text is dotted)



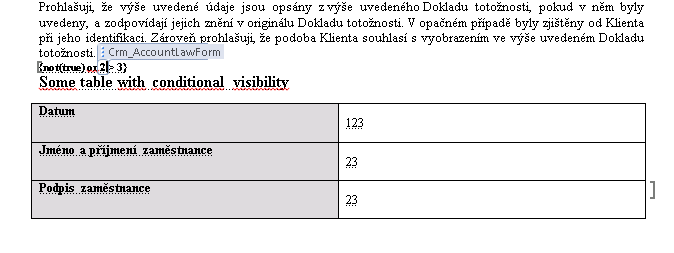
Picture : Print preview of final document



Picture : Print preview of final document for different entity



Picture : Conditional block with complex expression and table



Picture : Conditional block in final document is not visible since expression evaluated to false