



MetaDocs - Document Management System for Microsoft Dynamics 365 Business Central

Manage your Scanning, OCR and automate the business process for any department with an integrated document management system.

MetaDocs- Document Management System (DMS), the document management solution from MetaOption LLC for Dynamics 365 Business Central allows users to easily capture and search for documents related to Dynamics 365 transactions. It's an all-in-one solution for going digital with your accounting-related documents and transaction data. It is available as Desktop and Online Document Management System, which makes it suitable for every kind of work environment.

It offers extensive features such as Drag & Drop from Outlook or a local system, Scanning and OCR, Document Storage in D365 BC Server or cloud, Access Controls and Workflow over and above full range of Document Management Tools such as Version Control, Document Indexing, user permissions, comprehensive Search and more.

Ultimately, MetaDocs is what SMBs and Enterprises need to increase core efficiencies, reduce operational costs, streamline people and processes spread over different offices, ensure full control over actions and information and above all, become more efficient!



Move from Paper to Digital

MetaDocs is a simple solution that provides easy accessibility to all your files and information.



Seamless Integration

MetaDocs - Document Management System seamlessly integrates with D365 BC.



Upgrade to Latest Innovations

Systematic upgrades ensure smooth information generation, storage and sharing.



Adopt easy Transformation

- Easy Implementation
- Fully Customizable
- Access Anywhere

Key Defining Features

Drag & Drop documents from Outlook

Simply drag-and-drop one or multiple documents of all types (PDFs, emails, Word, Excel, PowerPoint, etc.) in D365 BC records.

Document Storage

Options to store documents on D365 BC server file system Amazon AWS, Azure, SharePoint, OneDrive

Document Search

Search and retrieve documents instantly using quick and easy integrated document search technology.

Document Indexing

Quickly index or tag the documents with metadata for faster and efficient retrieval.

Document Versioning

This feature ensures that you always have access to the latest and most updated version of a document.

Integrated Scanning, OCR & Searchable PDF

Scan Paper documents and convert them to fully searchable PDFs with OCR add-on.

Document Overview with sorting and filter functions

All stored documents are displayed in the Document Overview. The document overview is based on criteria such as year, content type, version or users are sorted. Each column can be searched directly via input and can have set filter options. The Document Overview also includes a preview functions that can be switched on and off.

MetaDocs Support

Part of our commitment to you is through the high quality, ongoing service you will receive from us. Our customers tell us that it's one of the reasons they chose us.

With a dedicated and trained technical support team in-house, you are always guaranteed expert help and advice no matter who you talk to on our helpdesk. With the ability to access your system remotely, issues can be resolved immediately and with minimal disruption to you. For most clients, our support team resolves the majority of issues with just the need of a call. However, if there's a need for a site visit, our friendly and experienced staff will be on hand for a face-to-face meeting.

Preview Documents

Stored documents can e.g. be viewed directly in an open offer, order or invoice.

Inbound lists

Inbound lists can e.g. are filled by mail or folder on the file server.

Document Sharing

Save money and time by simply sharing the document using built-in document sharing capabilities.

Document Hotlinks

Link document classes and documents with each other using Document Hotlinks and organize documents in logical group.

Document Scanning Worksheet

With scanning receive multiple scanned documents at once.

Permissions

- Strong permissions based on document category, sub-category and entities
- Access can be granted for only Purchase Invoices, or Vendor Records, or combination
- Read Only access can be enabled by document category and entities
- Upload access can be granted by document category and entities

Contact us

To know more about MetaDocs in more detail, or to learn more about MetaOption LLC:

Call: +1 (888) 895-4233

Email: info@metaoption.com

Visit: www.metaoption.com



Microsoft Dynamics
365 Business
Central

