

# Treeno Integration Microsoft Dynamics Nav Connector



## TreenoConnect Search

1. Authenticates the user
2. Launches the Treeno application
3. Automatically searches and retrieves the associated files for the integrated screen
4. Can initiate the creation of the electronic folder within the Treeno application

## TreenoConnect Index

1. Automatically files highlighted documents from the inbox to a automatically created file folder within Treeno
2. Allows for auto-filing of electronic documents via a drag-and-drop process to the index button
3. The integrated file folder will automatically be labeled when documents are indexed via the TreenoConnect tool

Treeno Connect Links Your Paper Documents to Your Microsoft Dynamics NAV Transactions with a Click of a Button – Auto Naming, Auto Filing and Linking

Thousands of organizations large and small manage their finances with Microsoft Dynamics NAV formerly Microsoft Navision ERP. The ability to quickly access customer and vendor related documents are critical for customer service and reducing costs. Now TreenoConnect MS NAV allows users to file and retrieve customer and vendor related documents with one click of a mouse. No more searching through file cabinets or nested electronic files.

Features include:

- Auto-indexing and retrieval of documents related to the Microsoft Dynamics NAV transaction file being viewed
- One click launches Treeno using single sign-on
- Works with Treeno SaaS and in-house deployments
- Designed to work with individual companies or multiple
- Works with any scanner or scanning-capable copy machine
- Documents can be scanned to a user's inbox or quickly routed using bar codes
- Allows for detailed auditing
- Details chain of custody reporting
- Enhanced security on files
- Remote auditor access
- Workflow routing and approval
- Thumbnail file previewing for speedy identification and retrieval

## Discover the Power of Treeno Document Management Solution

Client documents, vendor documents and AP documents can be a click away with TreenoConnect for MS NAV. Treeno is an easy-to-use and extremely powerful integrated document management system that enables organizations to capture, organize and share any type of digital or paper-based document within a secure, central repository. System deployment is effortless, document retrieval is instant, integration with existing applications is seamless and the Treeno system can scale to support as few or as many users as your organization requires. Treeno empowers you to improve client satisfaction through streamlined operations, improved efficiency, reduced costs and simplified audit preparation.

## Integration with Microsoft Dynamics NAV

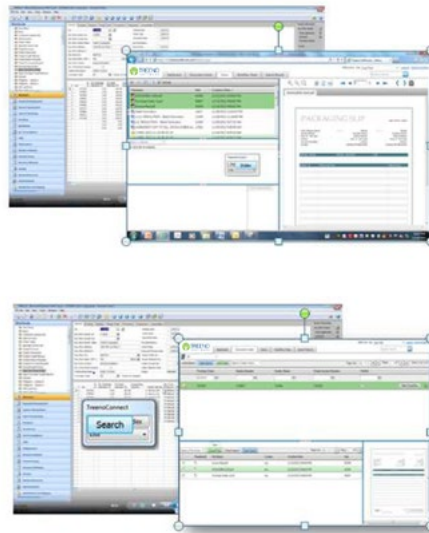
TrenoConnect supports automatic filing to an electronic folder where the file is automatically labeled and identified by key words available from the integrated screen.

Users can scan to an inbox, view the file in the Treno Viewer, enter or review the document against the Microsoft Dynamics NAV screen for automatic naming, routing and filing.

Users can drag-and-drop electronic files and emails to the TrenoConnect Index button for auto-filing them to the NAV transaction.

The TrenoConnect Search screen allows a authorized user to be on an integrated screen and automatically authenticate, search, retrieve and display the associated scanned documents and electronic files.

Treno provides users the ability to search via Treno Search tools to retrieve documents without having to log into Microsoft Dynamics NAV. This allows the documents to be accessed by authorized users without having to be a user of the Navision system.



### ABOUT TRENO SOFTWARE

Established in 2002, Treno Software is a leader in the Enterprise Document Management (EDM) industry. Treno Software's mission is to provide their customers with operational workflow efficiencies and measureable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web-based Enterprise Document Management (EDM) Software Solution.

To learn how Treno can help you— call **800.528.5005** or visit us on the web at **[trenosoftware.com](http://trenosoftware.com)**.

## Integrate documents at the Client, Vendor, Purchase Order, Invoices transaction screens

### Document Workflow and Reporting

Treno Workflow routing tool allows for documents to be stored securely and electronically notify users when it is their turn to work the file.

Treno Workflow reporting allows an organization to manage the people and the process while identifying bottlenecks, level loading work to ensure a positive customer experience.

### Ensure Document Integrity and Security

Treno EDM stores all of your information in a highly secure repository and includes a comprehensive audit trail. Treno customers can eliminate any possibility that documents stored in their system will be altered without detection, ensuring undisputed authenticity of records.

Disaster recovery is also greatly improved, as items previously managed via fax, mail, and other paper means are now stored in the Treno repository. With Treno EDM, documents of all types can be backed up in a secure manner and are protected from theft, accidental loss, or destruction.