

## Embedded, High Performance Scanning, OCR, and Workflow for Microsoft Dynamics 365 Finance & Operations and Outlook

Datahaven for Dynamics 365 provides organizations with a robust, cost-effective archive storage and retrieval solution that automates naming and filing protocols and displays security-controlled, context-sensitive folder and list views of transactional and non-transactional documents, email, and other electronic files related to any Microsoft Dynamics record in any Microsoft Dynamics module. With search, navigation, and workflow functionality embedded directly within the familiar interfaces of Microsoft Dynamics and Microsoft Outlook, Datahaven for Dynamics also offers enterprise-class features for organizations with more complexity and higher volume, including high-speed batch scanning, document-centric workflow, high-volume OCR data extraction, and a granular security model and audit trail.

Microsoft Dynamics 365

The screenshot shows the Dynamics 365 Finance and Operations interface. The main window displays a list of purchase orders with columns for Purchase order, Vendor account, Invoice account, Vendor name, and Purc. The sidebar on the right shows a tree view of Datahaven folders, including Purchase Order Documents, Purchase Order Support Documents, Quote, Receipts, and Posted Invoices.

Purchase order	Vendor account	Invoice account	Vendor name	Purc
00000125	1001	1001	Acme Office Supplies	Purc
00000150	1001	1001	Acme Office Supplies	Purc
00000175	US_TX_011	US_TX_011	Minnesota State Tax Authority	Purc
000002	US-102	US-102	Tailspring Parts	Purc
00000200	1001	1001	Acme Office Supplies	Purc
00000225	1001	1001	Acme Office Supplies	Purc
00000250	1001	1001	Acme Office Supplies	Purc
00000275	1001	1001	Acme Office Supplies	Purc
000003	CN-001	CN-001	Contoso Asia	Purc
00000300	1001	1001	Acme Office Supplies	Purc
00000325	1001	1001	Acme Office Supplies	Purc
00000350	1001	1001	Acme Office Supplies	Purc
00000375	1001	1001	Acme Office Supplies	Purc
000004	US-101	US-101	Fabrikam Electronics	Purc
00000400	1001	1001	Acme Office Supplies	Purc
00000425	1001	1001	Acme Office Supplies	Purc
00000450	1001	1001	Acme Office Supplies	Purc

Datahaven for Dynamics 365—shown here embedded on the purchase orders list page—provides virtual, context-sensitive folder and list views of one or more documents, emails, or other files related to a Dynamics purchase order record and other related transactions.

Outlook

The screenshot shows the Microsoft Outlook interface. The main window displays a list of emails with columns for Date, From, Subject, Received, Size, and Categories. The preview pane on the right shows a purchase invoice from SLOSS INDUSTRIES CORPORATION.

Date	From	Subject	Received	Size	Categories
10/9/2018 9:24 AM	Amcrest	Special Offer on Indoor and Outdoor PTZ WiFi Cameras and More!	Tue 10/9/2018 9:24 AM	42 KB	
10/8/2018 5:50 PM	Baraccuda Networks	Baraccuda Email Security Service Quarantine Notification	Mon 10/8/2018 5:50 PM	46 KB	
10/5/2018 11:11 PM	Facebook	Weekly Facebook Page update for Datahaven	Fri 10/5/2018 11:11 PM	30 KB	
10/4/2018 10:46 AM	Amcrest	Save on Amcrest 4K UltraHD Indoor & Outdoor Cameras and More!	Thu 10/4/2018 10:46 AM	43 KB	
10/3/2018 11:16 AM	Amcrest	Amcrest 2K UltraHD WiFi Cameras and More Starting at \$70!	Thu 10/3/2018 11:16 AM	39 KB	
9/25/2018 6:44 PM	Amcrest	Save on Amcrest ProHD 1080p WiFi and PoE IP Cameras and More!	Tue 9/25/2018 6:44 PM	42 KB	
10/2/2018 9:20 AM	Amcrest	Save 20% on Amcrest Cloud Annual ProHD Plans and More!	Mon 10/2/2018 9:20 AM	30 KB	
9/19/2018 12:32 PM	Facebook	Weekly Facebook Page update for Datahaven	Sun 9/19/2018 12:32 PM	30 KB	
10/2/2018 9:14 AM	Baraccuda Networks	Baraccuda Email Security Service Quarantine Notification	Fri 10/2/2018 9:14 AM	47 KB	
9/27/2018 4:30 PM	Amcrest	Your interactive recording is ready!	Thu 9/27/2018 4:30 PM	41 KB	
9/25/2018 11:16 AM	Amcrest	Amcrest 2K UltraHD WiFi Cameras and More Starting at \$70!	Thu 9/25/2018 11:16 AM	39 KB	
9/25/2018 6:44 PM	Amcrest	Your interactive recording is ready!	Tue 9/25/2018 6:44 PM	42 KB	
10/2/2018 5:39 PM	Baraccuda Networks	Baraccuda Email Security Service Quarantine Notification	Mon 10/2/2018 5:39 PM	46 KB	
10/2/2018 1:06 PM	Facebook	Weekly Facebook Page update for Datahaven	Mon 10/2/2018 1:06 PM	30 KB	

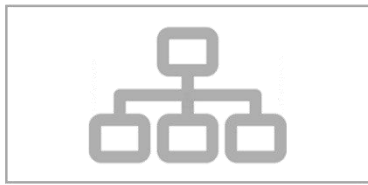
Datahaven for Dynamics 365—shown here embedded within Microsoft Outlook—provides Dynamics and non-Dynamics users with instant access to, and the ability to route and approve any document, email or other electronic files related to a Dynamics record.

# Datahaven Differentiation

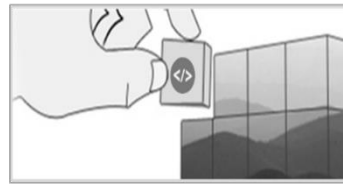
Datahaven is a truly unique document management platform in the Microsoft Dynamics 365 ecosystem. By embedding a complete document automation solution throughout Microsoft Dynamics and Outlook, Datahaven offers a powerful combination of intuitive interfaces and advanced scanning, OCR, and workflow functionality to deliver complete visibility, greater efficiency, and better compliance.



Embedded throughout Dynamics



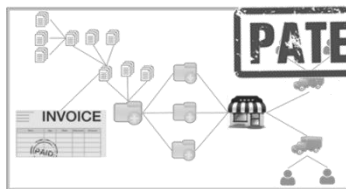
Any Dynamics 365 Module



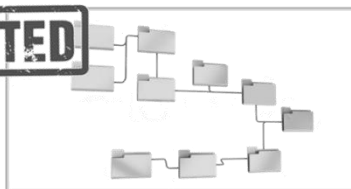
Customizations & 3<sup>rd</sup> Party Extensions



Embedded in Outlook



Deep Linking™



Virtual Folders



Complete Automation

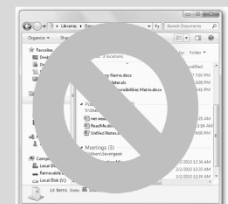
## Patented Virtual Folder Technology

Don't limit yourself to Dynamics file attachments, SharePoint, and old fashioned folder structures. Experience the unique power and flexibility of our patented virtual folder technology embedded in the native Dynamics 365 interface. Datahaven virtual folders display virtual folder structures with every document related to a Dynamics transaction (even those added to other related Dynamics transactions) without requiring users to spend time navigating to other Dynamics records or searching for documents that may have been added to a related Dynamics record. Datahaven's virtual folder technology dramatically enhances document and transactional visibility across an organization.

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00000450	1001	1001	Acme Office Supplies	Purc



Datahaven documents are not Dynamics "attachments"



Datahaven virtual folders are not "Windows Explorer" folders