

KENDOX INFOSHARE FOR SAP BUSINESS ONE

Practical integration in SAP Business One for audit-proof archiving

SAP Business One is a comprehensive business software for small and medium-sized enterprises. With functions such as financial management, sales, purchasing, warehouse management and CRM, it offers an integrated solution for the efficient control of business processes.

In interaction with **SAP Business One**, **Kendox InfoShare** ensures the legally compliant management of all incoming and outgoing documents. The document archive is operated exclusively in the cloud. All documents are in safe hands in certified data centres. There is no need to invest in expensive archiving infrastructure, and your staff can focus on core processes. Access to the archived documents is guaranteed at all times - either completely transparently integrated in **SAP Business One** or via other browser-based applications such as the **Kendox InfoShare Web Client**.

Convenient search functions ensure that users can find the documents and files they need quickly and easily. And with the completely open interface collection - the **Kendox InfoShare Web API** - almost all functions of the **Kendox InfoShare Cloud Archive Service** are available for individual requirements. This ensures that document archiving can be quickly and easily integrated into existing business processes and specialist applications.



YOUR BENEFITS

- ✓ Comprehensive standard solutions for the management of ERP receipts and sensitive documents
- ✓ Convenient integration in **SAP Business One** with transparent access to files and documents
- ✓ Individually configurable processes and filing plans
- ✓ Mobile access to documents with integrated document viewer
- ✓ Expandable to enterprise-wide document management
- ✓ Legally compliant storage and audit-proof archiving
- ✓ Professional operation in certified data centres

Integrated invoice receipt processing

In most organisations, the review and approval of incoming invoices is a time-consuming and costly process. Kendox InfoShare for **SAP Business One** optimises your invoice processing. With **Kendox InfoShare**, incoming invoices are automatically processed in a structured manner and approved via an individually configurable approval workflow. The transfer of pre-accounting information to **SAP Business One** after approval ensures a smooth processing flow, allowing approved invoices to be posted and released for payment quickly and efficiently.

RULE-BASED PROCESSING

Rule-based, process-driven processing ensures a high level of transparency, significantly improved responsiveness and short processing times, allowing full use of cash discounts. Receipts can be approved at any time on a mobile device, allowing invoices to be processed across multiple locations without media disruption.

DOCUMENT DATA EXTRACTION WITH AI SUPPORT

With integrated document data extraction, in addition to the header and footer data such as invoicing party, invoice number, invoice date, etc., the item data such as item number, delivery quantity, item price, etc. can also be extracted and compared with the data from **SAP Business One**. Data that is not clearly identified can be manually corrected if necessary. By using the integrated AI, the extraction rate and quality of document recognition can be significantly increased for complex documents.

DIRECT ACCESS TO INVOICE DOCUMENTS

Invoice documents stored in **Kendox InfoShare** can be opened quickly and easily directly from **SAP Business One**. This provides a quick view of the original document at any time. Access to the document is transparent - there is no need to manually switch to another application.

ARCHIVING IN THE CLOUD

The document repository is hosted in the cloud. Your documents are in safe hands in certified data centres in Germany. This ensures high availability and protection for your sensitive documents. There is no need to invest in expensive archiving infrastructure and your staff can focus on the core processes of your business.

SMOOTH PROCESSES

The entire invoice process is seamlessly integrated, starting with the digitisation of paper invoices, the automatic extraction of invoice data, the approval process and the posting within **SAP Business One**. Once approved, invoices are automatically 'migrated' to financial accounting for efficient posting.

FLEXIBLE PROCESSING

In addition to paper invoices that are first digitised, the invoice approval process also supports electronic invoices. This includes invoices that are emailed to the company as PDF documents, as well as invoices that comply with the XInvoice standard.

APPROVAL PROCESSES FOR INVOICES

Incoming invoices are first digitised and stored in **Kendox InfoShare**. The invoice then goes through a customisable approval process, including the capture of pre-accounting information, and is then transferred to **SAP Business One** for further processing. In addition, an automatically generated release and approval protocol can be used to document the process, including account assignment information, and is linked to the original document.

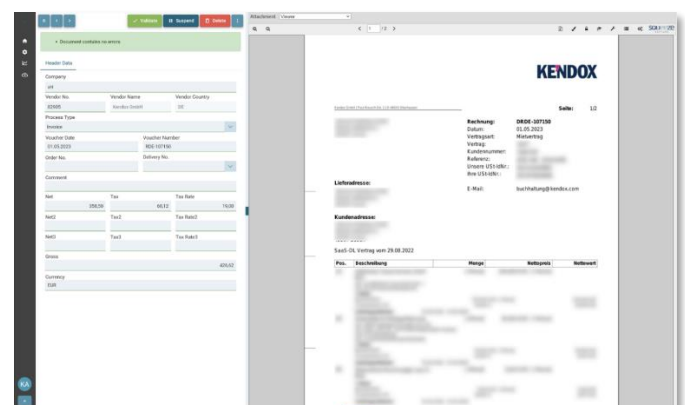
E-MAIL INTEGRATION

Incoming documents that are sent by email to a central mailbox (e.g. info@firma.com) can be automatically extracted from the email, archived in **Kendox InfoShare** in a legally compliant manner and simultaneously fed into a follow-up process.

SUPPORTS THE FOLLOWING FORMATS

- Paper invoices
- Electronic invoices attached to e-mails (PDF)
- Invoices in ZUGFeRD¹ format
- Invoices in XInvoice format

¹ Central User Guidelines Forum Electronic Invoice Germany



Archiving of outgoing documents & external attachments

ARCHIVING OF OUTGOING DOCUMENTS & EXTERNAL ATTACHMENTS

The documents generated by **SAP Business One** (outgoing invoices, purchase orders, delivery notes, etc.) can be automatically archived in **Kendox InfoShare**. Using **Kendox InfoShare's** open interface (API), any documents from other applications can be transferred directly into the archive with the corresponding index values. In addition, documents archived in this way can be automatically assigned to the corresponding files without manual intervention. For example, external attachments that have been uploaded to **SAP Business One** and saved with a purchase order can be automatically archived via **Kendox InfoShare** and provided with the necessary contextual information (metadata). This way, they are stored securely with the associated documents and are available at any time.

DIRECT ACCESS TO THE DOCUMENTS

Documents archived in **Kendox InfoShare** can be opened quickly and easily directly from **SAP Business One**. Document access is transparent - there is no need to manually switch to another application. Alternatively, users can access files and documents via the **Kendox InfoShare Web Client** and other browser-based applications. **Kendox InfoShare** can be used to manage not only incoming invoices or credit notes, but also all other incoming and outgoing documents, such as outgoing invoices, delivery notes, receipts or material withdrawal documents. Depending on the application scenario, documents can be transferred manually, semi-automatically or fully automatically in the background. Convenient tools are available for capturing incoming paper documents, helping users to efficiently digitise and index documents. Documents can then be accessed from **SAP Business One** via an integrated, context-sensitive interface or via the search function integrated into the SAP interface.

CONVENIENT CAPTURING TOOLS

Kendox InfoShare provides tools for digitising individual paper documents (workstation scanning) as well as entire batches of documents (batch scanning). Documents can be automatically separated into batches using either barcodes or separator sheets.

The screenshot displays the SAP Business One interface. The top menu bar includes 'File', 'Edit', 'View', 'Data', 'Go to', 'Modules', 'Tools', 'Window', and 'Help'. The main window is titled 'Z_TEST_KENDOX_VI... | KENDOX'. The left sidebar shows a 'Main Menu' with categories like Administration, Financials, CRM, Sales - A/R, Purchasing - A/P, Banking, Inventory, Production, Reports, InterCompany, and CleverDMS4SAP. The 'Purchasing - A/P' section is expanded, showing options like Purchase Blanket Agreement, Purchase Request, Purchase Quotation, Purchase Order, Goods Receipt PO, Goods Return Request, Goods Return, A/P Down Payment Request, A/P Down Payment Invoice, A/P Invoice, A/P Credit Memo, A/P Reserve Invoice, Recurring Transaction Templates, Procurement Confirmation Wizard, and Purchase Budget Wizard. The 'A/P Invoice' window is open, showing details for Vendor 'Kendox GmbH' (ID 82905), including Name, Contact Person, Vendor Ref. No. (RDE-107150), Local Currency, No. (8501457), Status (Open), Posting Date (01.05.2023), Due Date (15.05.2023), and Document Date (01.05.2023). The 'Documents - SAP' window is also open, displaying a table of documents. The table has columns for Document Type, Receipt Number, Receipt Date, Document direc..., BP Name, BP Number, Reference Num..., ERPPreference, Creator, and Creation date. A single document is listed: 'Engangrechnung' with Receipt Number 8501457, Receipt Date 5/1/2023, Document direc... 'Eingang', BP Name 'Kendox GmbH', BP Number 82905, Reference Num... 'RDE-107150', ERPPreference 'vH000025', Creator 'DI administrator', and Creation date '5/30/2023 3:48 PM'. The interface also shows a 'Documents' sidebar with options like Upload, Create from template, Shares, My shares, and Manage shares. The bottom status bar indicates 'Im Vordergrund bleiben' and '1 Hits Search more'.

Digital files

Overcrowded filing cabinets, time-consuming document storage and tedious searches are a thing of the past. **Kendox InfoShare** digital files, integrated with **SAP Business One**, make paper files history. All documents - contract, customer, supplier, fleet or CRM documents, etc. - are digitised and made available centrally and at any time in an audit-proof archive.

ONE TECHNOLOGY - MANY APPLICATIONS

Kendox InfoShare digital files are available in a range of versions to assist you with the digitalisation of your administration and management processes. Currently available:

- **Business partner files:** Organise and manage your supplier and customer documents, such as outbound ERP documents (e.g. delivery notes, invoices or correspondence).
- **Contract management:** Centralised contract management with features such as document review processes, deadline monitoring, escalation management, digital signatures or document generation with **Kendox InfoShare** template management.
- **Personnel files:** Structured and clear management of your personnel files and all related documents, monitoring of deadlines (e.g. driving licence test, renewal of employee certificates) - with or without connection to **SAP Business One** and always legally compliant.
- **Fleet files:** Intuitive and lean file solution for fleet management with the proven features of **Kendox InfoShare**.

EFFICIENT IMPLEMENTATION - THANKS TO DIGITAL FILE TEMPLATES

Pre-defined file templates, such as contract, fleet or business partner files, make it possible to implement solutions quickly and efficiently, as the file solutions are standardised and still have room for your individual requirements and the mapping of your processes.

INTEGRATED TEMPLATE MANAGER

The Office integration of the digital file allows new documents to be created directly in the file using the template manager and based on text modules. The new document is automatically assigned to the correct file.

CENTRAL MANAGEMENT, GLOBAL ACCESS

Access to documents from any location is a major benefit for distributed organisations. Documents and information are managed centrally in the digital file, but can be accessed quickly and easily from anywhere at any time. Detailed permissions also ensure that only authorised users can access sensitive information, enforcing both legal and internal privacy policies.

TEMPORARY DOCUMENT SHARING

Individual documents or entire files can be given temporary access to another employee or their manager. Access is automatically revoked after a pre-defined period of time.

AUTOMATIC FILE CREATION AND DOCUMENT FILING

Business partner files can be created automatically from **SAP Business One**. The master data of the customer or supplier is attached to the digital file cover as information. This allows structured access to the digital files without having to use the ERP. Both documents generated within **SAP Business One** (e.g. customer invoices) and documents from external systems (e.g. payroll) can be automatically filed in the appropriate customer or business partner file via the available interfaces.

LEGALLY COMPLIANT ARCHIVING

Documents in the digital file are archived in a legally compliant manner, changes to the documents are traceable and the processing steps are also logged. This reassures the department that everything is under control.

The screenshot displays the 'Dossiers - Customer Files' interface. On the left, a table lists various customer files with columns for Customer Number, Customer Name, MSC Classification, Category, Industry, and County. On the right, a detailed view of a selected file is shown, including fields for Customer ID, Customer Name, Address, City, State, and Contact Information.

Customer Number	Customer Name	MSC Classification	Category	Industry	County
1000000	Infocore GmbH	A	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000001	Infocore GmbH	B	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000002	Infocore GmbH	C	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000003	Infocore GmbH	D	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000004	Infocore GmbH	E	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000005	Infocore GmbH	F	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000006	Infocore GmbH	G	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000007	Infocore GmbH	H	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000008	Infocore GmbH	I	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000009	Infocore GmbH	J	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000010	Infocore GmbH	K	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000011	Infocore GmbH	L	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000012	Infocore GmbH	M	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000013	Infocore GmbH	N	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000014	Infocore GmbH	O	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000015	Infocore GmbH	P	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000016	Infocore GmbH	Q	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000017	Infocore GmbH	R	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000018	Infocore GmbH	S	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000019	Infocore GmbH	T	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000020	Infocore GmbH	U	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000021	Infocore GmbH	V	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000022	Infocore GmbH	W	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000023	Infocore GmbH	X	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000024	Infocore GmbH	Y	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE
1000025	Infocore GmbH	Z	Intermediäre	Berateringen, Unternehmens- und IT-Dienstleistungen	DE

Digitally sign receipts and documents

With **Kendox InfoShare Cloud Signature Services**, handwritten signatures are a thing of the past. Once digital signatures are integrated into your processes, you can eliminate the need for multiple printouts, manual distribution of documents and subsequent scanning. Contracts and agreements can be completed much more quickly and business can be conducted more efficiently. By using digital signatures and seamless processes, you can also significantly increase employee productivity and save money.

UNIVERSALLY USABLE

No matter what processes or documents require a binding signature, the Cloud Signature Service can be integrated with all **Kendox** solutions. Whether in Contract Management, the Digital Personnel File, Fleet Management or any other **Kendox** solution.

COMPREHENSIBLE AND TRANSPARENT

Digital signature approval and signature logs are automatically archived and linked to the original document. This ensures that you can always trace who signed which document and when. And you will always have an overview of where your document is in the signature process.

FLEXIBLE PROCESS DESIGN

Documents and receipts are transferred directly from **Kendox InfoShare** to the signature service. The process, sequence and rules for the signature and approval process is defined and then carried out with **Kendox InfoShare**. Once digitally signed, documents are archived in **Kendox InfoShare** in a legally compliant, audit-proof and unalterable form.

LEGALLY SECURE INSTEAD OF "QUITE" SECURE

Depending on the signature provider, electronic signatures are compliant with the EU's eIDAS² regulation. This ensures the legal validity of electronic signatures in court: they are almost equivalent to paper signatures³.

DIGITAL CONTROL OF DOCUMENTS

No matter what processes or documents require a binding signature, the Cloud Signature Service can be integrated across all **Kendox** solutions. Signing offers and contracts, approving orders and invoices, confirming receipt of information and much more can be done digitally with the Cloud Signature Service.

THE FOLLOWING SIGNATURE PROVIDERS ARE CURRENTLY INTEGRATED:

- DocuSign
- ActaSign
- AdobeSign
- Scribble

The screenshot displays the Kendox web application interface. At the top, there's a navigation bar with 'Kendox' and user information. Below it, a search bar and document management options are visible. A table lists documents with columns for 'Registrier', 'Dokument...', 'Dokument...', 'Betreff', 'Ersteller', 'Erstellungs...', and 'Name'. A document titled 'Vertrag' is selected, showing details like '30.04.2021' and 'aktuelle Fassung: DG-administr: 30.04.2021 14: Vertragsbestig'. A preview window on the right shows a contract document with a signature field and the Kendox logo.

¹ eIDAS: Electronic Identification, Authentication and Trust Services

² For the vast majority of transactions, a simple electronic signature is sufficient; in certain rare cases, a qualified electronic signature (QES) is required (see also §126a BGB).

Multilingualism

The Kendox InfoShare Web Client can be used internationally and is currently available in the following languages:



CURRENTLY AVAILABLE

- German
- English
- French
- Italian
- Spanish
- Portuguese
- Dutch
- Japanese
- Mandarin
- Polish

Other languages are in preparation and available on request.

