tso.de

CASE STUDY

Act faster and more securely thanks to digital document management

Solit

The SOLIT Group is one of the leading precious metal trading companies in Germany with headquarters in Wiesbaden. Since 2008, the SOLIT brand has been offering needs-based investment solutions in the field of physical precious metals. Through SOLIT, precious metal volumes in the three-digit million euro range are realized annually. The SOLIT Group offers its customers a complete portfolio consisting of precious metal savings plans, various storage concepts and tangible asset-based investment funds, with a focus on the monetary precious metals gold and silver.

Project

▶ Introduction of the document management system M-Files

▶ Setup of the TSO-DATA DMS Connector for the connection to the ERP System Microsoft Business Central

The SOLIT Group is one of the leading precious metal trading companies in Germany. Since 2008, the SOLIT brand has been offering needs-based investment solutions in the field of physical precious metals. Precious metal volumes in the three-digit million euro range are realised annually via SOLIT. The portfolio consists of precious metal savings plans, various storage concepts and tangible asset-based investment funds, with a focus on the monetary precious metals gold and silver.

Due to this wide range of services, many commercial documents and contracts are created in various business areas, which have to be archived in an audit-proof manner. For this reason, the SOLIT Group was looking for a solution that would ensure and digitise the archiving of all business documents for the total of 5 different companies of the SOLIT Group in individual clients. At the same time, access to the documents should be made possible and accelerated at any time and from any location. The second requirement was to also display these digital document management processes in the already existing ERP system Microsoft Dynamics 365 Business Central and in the course of this also to implement automatic invoice processing - for more efficiency in the company.

These challenges were tailor-made for the Microsoft Gold Partners from the business system house TSO-DATA. For 25 years, the experts from Osnabrück have been developing, implementing and realising innovative IT solutions and individual service concepts. In doing so, the IT full-service partner relies on future-oriented technologies that can be specially adapted to the needs of medium-sized (commercial) enterprises. This also includes a great deal of know-how in the field of document management. An ideal basis for understanding the needs of the SOLIT Group.

First steps - Proof of concept

To ensure that the concept developed by TSO-DATA is the right path for the desired digitisation, the business system house always applies a proof of concept methodology developed in-house. Here, defined steps are completed before the start of the project and the functionality of the existing systems is tested. This basis offered the SOLIT Group a great deal of security for the investment decision, especially since licence fees for the software are already incurred at this stage, which were initially taken over by TSO-DATA.

> *„The close coordination with TSO-DATA began in the run-up to the implementation. This meant that the entire process could be optimally planned for us and all other participants and successfully implemented within the set time frame."*
>
> **confirms Max Kratz, IT administrator and project manager at SOLIT Group**

Manage documents intelligently

In order to efficiently organise receipts, contracts and other documents, the decision was made in favour of the intelligent information and document management system M-Files. This solution supports the SOLIT Group in managing all documents digitally and finding them again particularly intuitively and quickly thanks to the integrated metadata concept. It is possible to determine exactly which employee can access which documents. Workflows, e.g. for invoice verification, can also be created and thus guarantee a targeted handling of the processes by all persons involved in the process. In the end, the large scope of the solution and the high flexibility were just as convincing as TSO-DATA's many years of DMS experience and the intensive partnership with the company M-Files. The seamless integration into Microsoft Dynamics 365 Business Central with the DMS Connector was another plus.

Seamless connection of ERP and DMS

The DMS Connector, developed by TSO-DATA and already successfully used in many projects, forms the interface between the ERP system Microsoft Dynamics 365 Business Central and the document management system M-Files. This direct connection creates many advantages. Documents such as invoices, quotations, delivery notes and other electronic documents such as emails are simply transferred with master data and transactions from Dynamics 365 Business Central / NAV to the document management system. Documents can also be stored in the DMS directly via drag & drop from the ERP interface in a particularly intuitive and fast way.

Likewise, the processing of daily incoming mail including scanned documents can be done conveniently directly in the ERP system. In this way, the documents are sifted and assigned to the correct processes and the employees do not have to leave the familiar ERP platform. In the document management system M-Files chosen by SOLIT Group, the DMS Connector additionally stores the file with the associated metadata such as „number" and „contact" of the corresponding transaction after selecting the appropriate document class.

Automated invoice processing speeds up processes

Digitisation ensures increased efficiency in many areas. Thus, the SOLIT Group's additional decision for fully automated document processing using Continia Document Capture was the logical consequence of the measures described. Here too, the SOLIT Group was able to draw on the expertise of TSO-DATA. Document Capture for invoice processing is seamlessly integrated as an add-on into the ERP system Microsoft Dynamics 365 Business Central and thus ensures significant time and cost savings compared to manual invoice verification. In addition, the software reduces possible process errors.

Conclusion and outlook

After the successful implementation of the document management system M-Files including the seamless connection to the existing ERP solution by means of the DMS Connector, the SOLIT Group now also processes its documents fully automatically - in all 5 corporate clients. Thanks to the digital processes, the trading company not only benefits from increased efficiency and speed, but also from enormous flexibility. From now on, nothing stands in the way of working independently of time and place.

> „TSO-DATA is the best implementation partner we have ever had. We really like the M-Files solution, even though we have not yet exhausted all of its potential."
>
> **Max Kratz aptly sums up the smooth cooperation.**

The comprehensive range of functions in M-Files offers additional possibilities and optimisations for many company processes, which often arise in questions during the project and also in the downstream work with the document management system as a result of close cooperation between the user and the TSO-DATA team.

Further information about M-Files:

Contact us!

Andreas Blom
Sales DMS

+49 (541) 1395-84
ablom@tso.de

Johanna Wiltmann
Consulting DMS

+49 (541) 1395-61
jwiltmann@tso.de

TSO-DATA GmbH is part of the TSO-DATA Group, which comprises more than 200 employees at the company locations in Osnabrück, Nuremberg and Bremen. As an IT specialist and Microsoft Dynamics partner, the experts develop, implement and realize innovative IT solutions and offer individual service concepts - nationally and internationally. In doing so, TSO-DATA relies on modern and future-oriented technologies that can be adapted specifically to the needs of medium-sized companies.

The focus of the solution portfolio is on the ERP solution Microsoft Dynamics 365 Business Central / NAV, the industry solutions KatarGo and LS Central for mail order and retail, Dynamics 365 - CRM, document management with M-Files and Microsoft SharePoint, business intelligence with Microsoft Power BI and TARGIT as well as IT infrastructure and cloud services.

TSO DATA
Unternehmensgruppe

Osnabrück - Nuremberg - Bremen
www.tso.de | info@tso.de