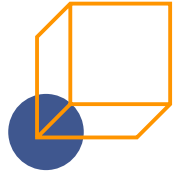


DOCENTRIC

Electronic Reporting & Configurable Business Documents With Docentric Enhancements

A short presentation for MeetUp on 27th of July 2023





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FINANCE & OPERATIONS



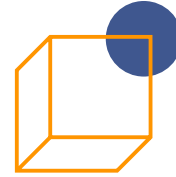
BUSINESS CENTRAL



CUSTOMER ENGAGEMENT



POWER PLATFORM



With you today:

Albin Lotric

Senior Technical Consultant
Docentric



Workshop Agenda



01

ER/CBD Basics
(15 min)

02

Docentric ER/CBD Enhancements
(30 min)

03

Summary + Q&A
(10 min)

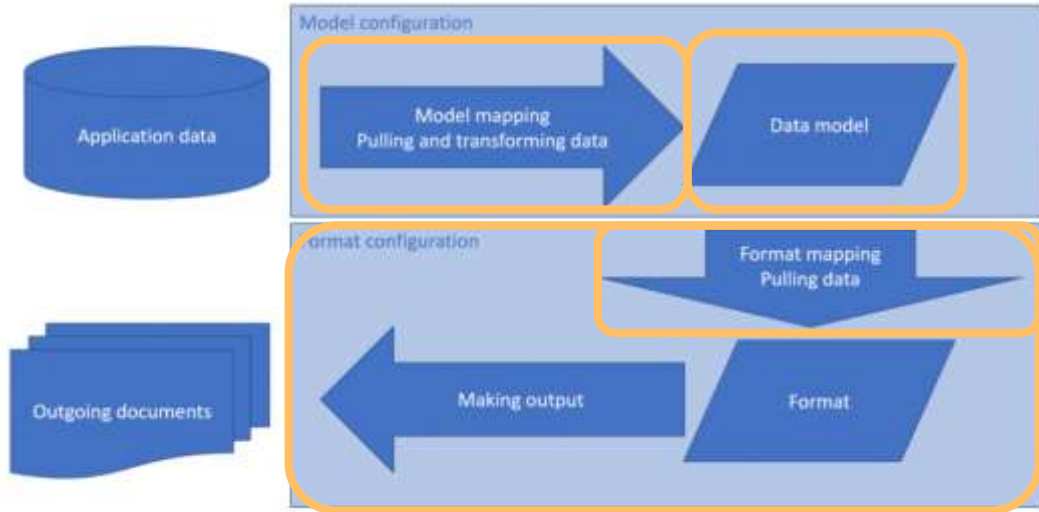


01

ER/CBD Basics



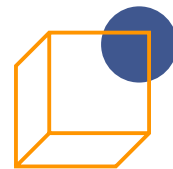
ER Basics



Getting ER Configurations

1. **LCS > Shared assets > GER configuration library**
LCS > /Your project/ > Asset library > GER Configuration
(will be deprecated)
2. **RCS > Electronic reporting > Reporting configurations**
(MS sources say there will be some changes)
3. **Manual import of configurations**

Add Configuration Provider



Finance and Operations

Save + New Delete Options

Configuration provider table

Standard view

Filter

Name	Internet address
Microsoft	http://microsoft.com
Docentric	https://ax.docentric.co

Finance and Operations

Options

Localization configurations

Configurations

- Reporting configurations
- Tax configurations
- Metadata configurations

Configuration providers

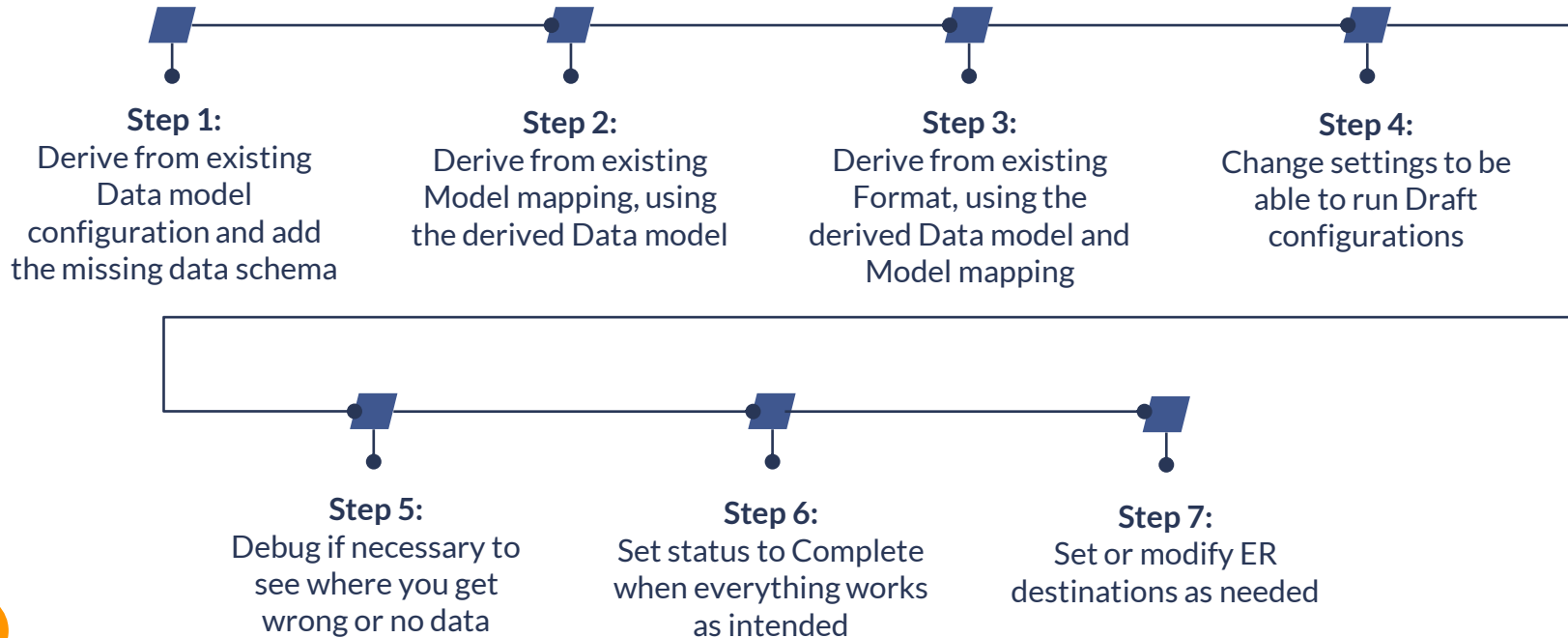
Microsoft
http://microsoft.com

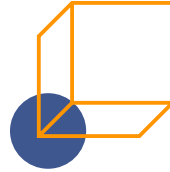
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https://ax.docentric.com

Repositories

Set active

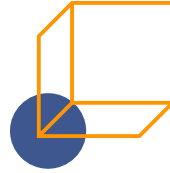
ER Customization Process





DEMO





02

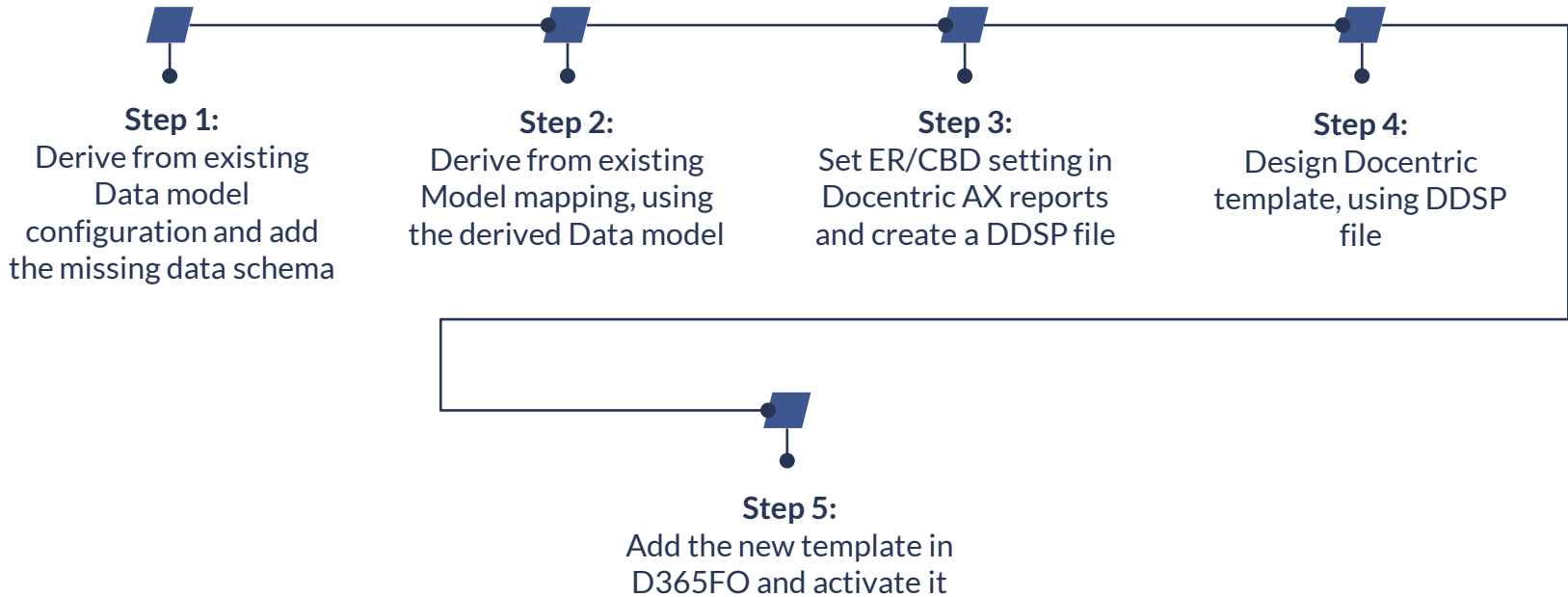
Docentric ER/CBD Enhancements

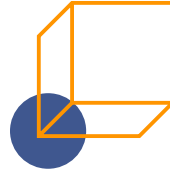


Main Advantages

- Docentric uses Word for template design
- No need for the Format configuration
- No need for setting up ER destinations
- Ability to use Print management settings
- Last, but not least: Much less stress!

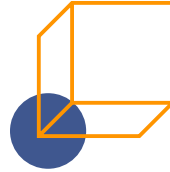
Docentric ER Customization Process





DEMO





03

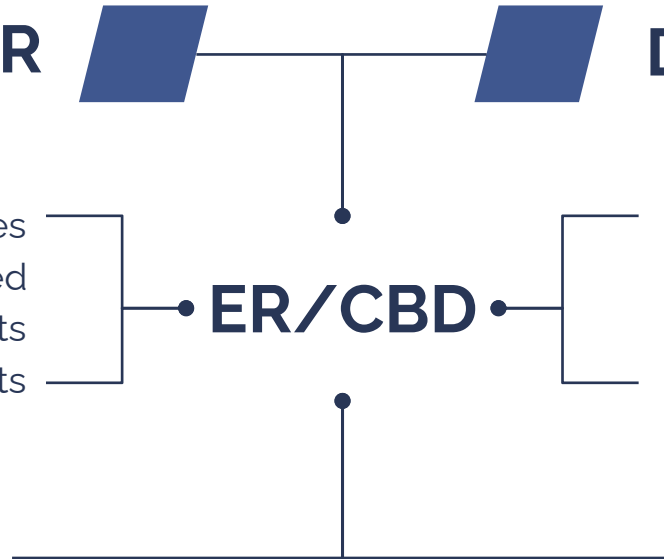
Summary + Q&A



When to use?

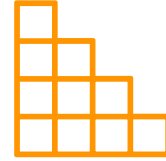
Standard ER

- Simple templates
- Excel output is needed
- Low design requirements
- Simple output requirements



Docentric ER

- Complex templates with complex logic
- High design requirements
- Complex output automation with Print management
- Short deadlines



Thanks!

Do you have any questions?

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ax.docentric.com

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