

DOCENTRIC FREE EDITION

WHAT CAN IT DO FOR YOUR D365FO PROJECTS?

DOCENTRIC Sponsorship Session

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 **COMMUNITY
SUMMIT 2023**

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Agenda

- ❖ Introduction
 - About Docentric
 - Why Docentric Free Edition?
- ❖ Print destinations (as you expect them to be)
- ❖ Print archive (finally useful)
- ❖ (Improved) document management attachments
- ❖ License Plate Labels (simplified)
- ❖ (Comfortable and flexible) Email templates for Alerts and Workflows
 - Alerts++
- ❖ Print management setup improvements

About Docentric



- ❖ Company founded in **2010**
- ❖ Specialized in **reporting and document automation**
- ❖ Trusted by **700+** end-customers worldwide (FULL edition)
- ❖ **3.000+** installations worldwide (FULL + FREE edition)
- ❖ **100+ million** processed documents per year

Average 6+ download requests every day in last few months

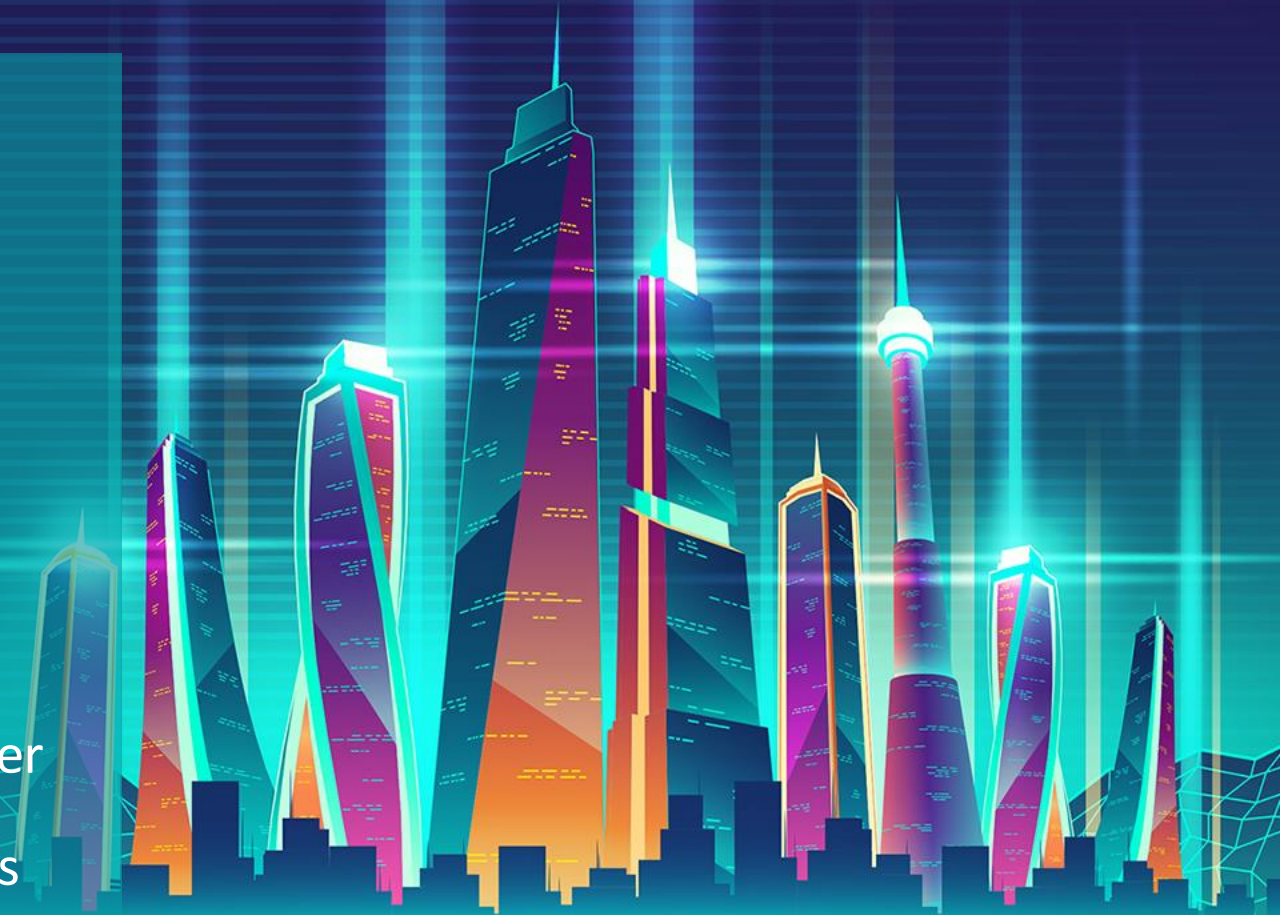
Introductio

n

- ❖ About Docentric
- ❖ Why Docentric Free Edition?

Why Docentric Free Edition?

- ❖ Because... Why not? 😊
- ❖ How it all started: Docentric print destinations
 - Perfect candidate to test the idea of Free Edition
- ❖ What happened next: addicted to giving back to our community
 - Sales: what will be for Full Edition?
 - Dev: what will be for Free Edition?
- ❖ Striving for excellence
 - Microsoft is under the pressure to deliver new features quickly
 - Docentric polishes the standard features related to our core product
- ❖ It is a mindset



Print Destinations

- ❖ Docentric Email
- ❖ Docentric File
- ❖ Docentric Printer

But first: Placeholders

- ❖ Main purpose: provide dynamic content in print destinations, for example:
 - Personalized Email subject and body
 - Dynamic folder names
 - Meaningful file names
- ❖ Docentric Free edition supports:
 - Standard placeholders: common to all reports
 - Custom placeholders: report-specific
- ❖ Docentric Full edition additionally supports:
 - User-defined placeholders: report-specific

Print destination: Docentric Email

❖ Standard D365FO Email print destination:

- To and Cc fields, (fixed) Subject, File format

❖ Docentric Email print destination:

- Additional Email tokens
- Dynamic Subject
- Open email before sending
- Dynamic document (attachment) name
- Bcc and From field
- HTML Email body editor with placeholders

Print destination settings

Print archive
Screen
Printer
File
Email

Save in print archive?
 No

To
 Edit ▾

Cc
 Edit ▾

Subject

Print destination settings - Docentric

Generate DS
Print archive
Screen
Printer
File
Email

Options ▾

Select template ▾

Select email template ▾

To, Subject ▴

To
 ▾

Subject

Open email before sending
 Yes

Attachment ▾

Cc, Bcc, From ▾

Body ▾

Additional attachment rules (4) ▾

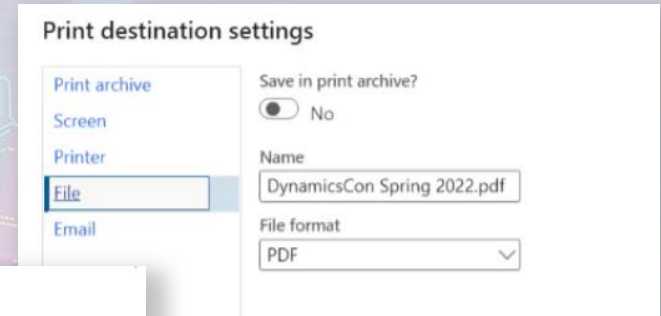
Print destination: Docentric File

❖ Standard D365FO File print destination:

- File name, File format

❖ Docentric File print destination:

- Dynamic File name
- Save to Azure Blob storage
- Save to Azure files
- Save to SharePoint
- Save to Attachments
- Save to File system



Print destination settings

Print archive

Screen

Printer

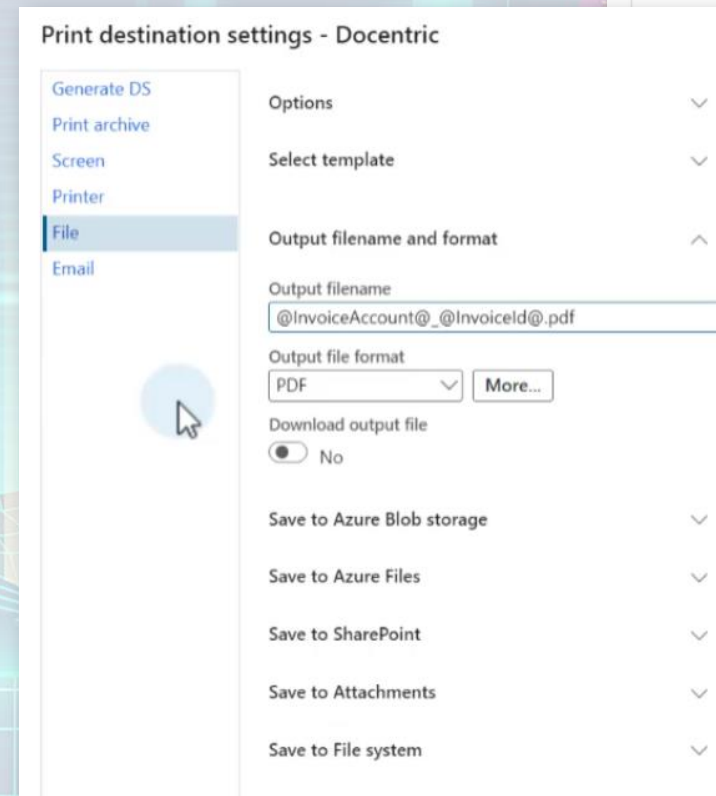
File

Email

Save in print archive?
 No

Name
DynamicsCon Spring 2022.pdf

File format
PDF



Print destination settings - Docentric

Generate DS

Print archive

Screen

Printer

File

Email

Options

Select template

Output filename and format

Output filename
@InvoiceAccount@_@InvoiceId@.pdf

Output file format
PDF More...

Download output file
 No

Save to Azure Blob storage

Save to Azure Files

Save to SharePoint

Save to Attachments

Save to File system

Print destination: Docentric Printer

- ❖ Standard D365FO Printer print destination:
 - Standard lookup
- ❖ Docentric Printer print destination:
 - Custom lookup (search, filter)
 - Print as PDF
- ❖ Printer setup improvements:
 - Default printer
 - Restricted printers
 - User allowed/favorite printers

Print Archive

- ❖ Metadata (document ID, account ID, batch ID, ...)
- ❖ Print destination info
- ❖ Log (success, failure)
- ❖ Instant preview
- ❖ Download multi-selected archived reports
- ❖ Access from accounts and common journals

Document Management Attachments

- ❖ View in grid
- ❖ Instant preview
- ❖ Update in bulk
- ❖ Multi-select and download



Licence Plate Labels

- ❖ Simplified Document Routing setup
- ❖ Test the Document Routing setup
- ❖ Reprint from D365FO

Email Templates for Alerts and Workflows

- ❖ HTML Email body editor
- ❖ Placeholders overview and picker
- ❖ Custom placeholders
- ❖ Attachments

Alerts++

- ❖ Alert emails improvements
- ❖ Manage alerts
- ❖ Alert rules improvements
- ❖ Show system fields
- ❖ Open alert notifications
- ❖ Target a User group
- ❖ View in grid
- ❖ Advanced filtering
- ❖ Create alert in a single click

Print Management Improvements

- ❖ Simplified access
- ❖ Print management data entity
- ❖ NEW: Print management utilities

DYNAMICS

DYNAMICS 365 AND POWER PLATFORM COMMUNITY CONFERENCE

Thank you ALL for an incredible week — seriously the best conference I have ever attended!

Dona Sarkar

Best event ever, thank you for giving me the opportunity to be part of it. Looking forward to more such great events.

Georg Glantsching

It was a fabulous event, the best I have been to, and that is a lot. First event my “not in the business” wife actually enjoyed!



Steve Mordue

I have made core memories at this event, and all this can only be attributed to you, the organizers. You gathered the right people in the right environment to allow us to create and expand relations.

Thank you ❤️

This event was really awesome and without a doubt one of the best I have ever been to.

This was the most amazing event ever! I know, you know it and I think that everyone else now knows it. Everyone that was not here, now says that they want to come on the next one.

Thanks for organizing this next level experience event. It was nice to meet a lot of people.

See you at DynamicsMinds 20



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Thank You!



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