Dynamics 365 and Power Platform Community Conference

MAY 26 – 28, 2025

Portorož, Slovenia

Top 7 D365FO Reporting Challenges You Can Solve Only With Docentric

Print Management Witch

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Agenda

Top 7 D365FO Reporting Challenges You Can Solve Only With Docentric

1. True user-friendly format designer
2. Electronic reporting integration
3. Flexible document distribution
4. Electronic PDF signatures
5. Saving to SharePoint with metadata
6. Manageable Print management
7. Roadmap: A LOT!

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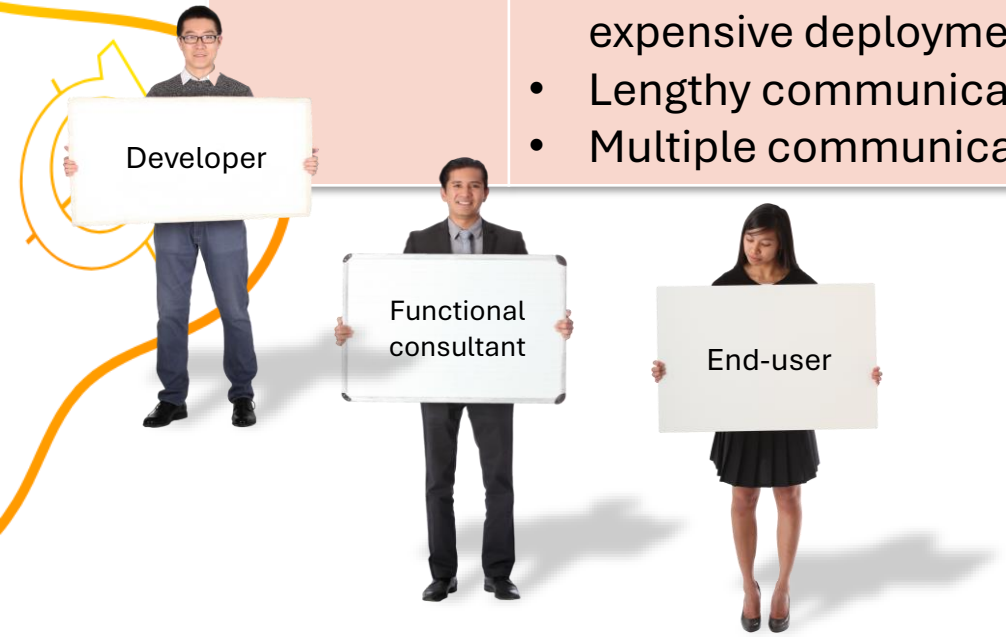
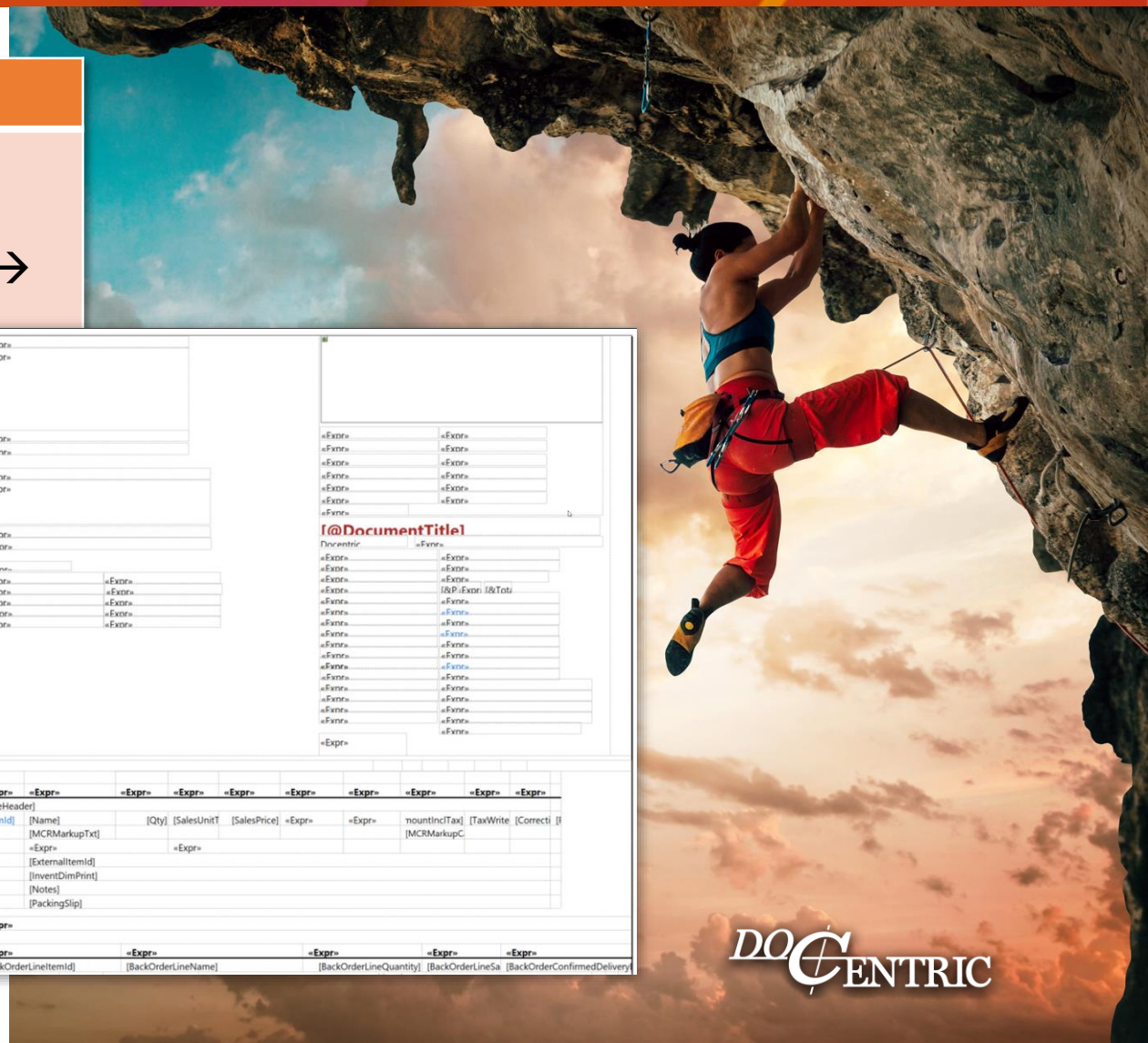
1. True User-Friendly Format Designer

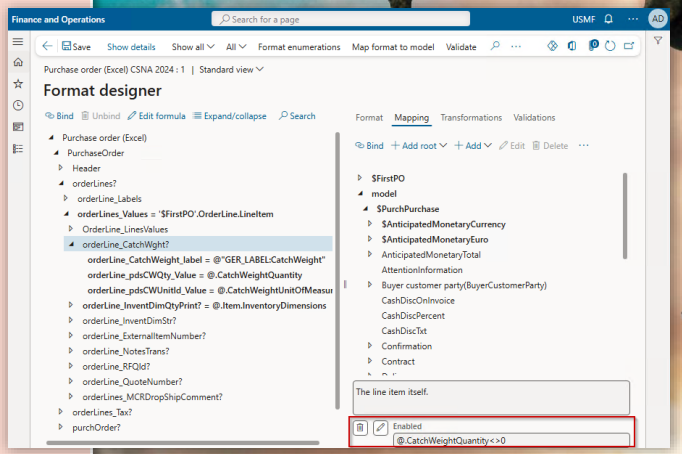
Technology	Challenges
SSRS	• Non-intuitive • Not user friendly • Non-efficient design-test process → long design time • Developer required • Deployed via code → long and expensive deployment • Lengthy communication cycle • Multiple communication cycles

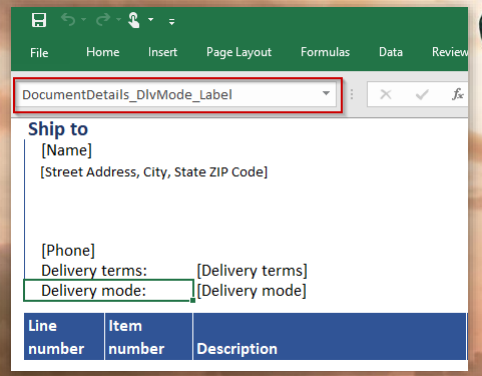




1. True User-Friendly Format Designer

Technology	Challenges
SSRS	• Non-intuitive • Not user friendly • Non-efficient design-test process → long design time • Developer required • Deployed via code → long and expensive deployment • Lengthy communication cycle • Multiple communication cycles
ER	• No specialized templating tool • Overhead with specifying the named ranges • Not user friendly • Excel → PDF produces a bit „off“ output





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2. Electronic Reporting (ER/CBD) Integration

Invoice

Contoso Entertainment System USA

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Company information

123 Coffee Street
Suite 300
Redmond, WA 98052
USA

Phone: +386 31 331 888
Fax: +386 31 331 889
E-mail:

Giro account:
Registration number:
Tax registration number: 1234123400
Tax exempt number::
Enterprise number:

Buyer

Maple Company
456 Yellow Road
Blue Mountain, MA 38610
USA

CIV-000697

Invoice date: 12/14/2016
Date and time: 5/28/2025 12:52:14 AM
Sales order: 000723
Purchase order:
Your reference:
Our reference: Karl Bystrom
Payment condition: Net 30 days
Invoice account: US-026
Payment reference:
Payment Id: 007471

Contact person:

Packing duty license number:

Item number	Item description	Quantity	Unit	Unit price	Discount percent	Discount	Amount	Print code
D0001	Mid-Range Speaker	2.00	ea	480.00	0.00	0.00	960.00	
L0001	Mid-Range Speaker 2	6.00	ea	500.00	0.00	0.00	3,000.00	
P0001	Acoustic Foam panel	6.00	ea	37.00	0.00	0.00	222.00	

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3. Flexible Document Distribution

- Emailing
  - Enhanced Email print destination
  - Convenient HTML body editor
  - Check the email message before sending
  - Configurable dynamic content via placeholders
  - Additional email attachments (load or generate in runtime)
  - Additional email sender accounts
  - Email processing
  - Unresolved email tokens handling
  - Advanced email tokens
  - Multilingual print destination settings
- Integrations
  - Saving file to SharePoint, Azure Blob storage
  - Soon to come: SFTP
- Printing to printer
  - Default user printer
  - Soon to come: printer tokens

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4. Electronic PDF Signatures

Signed and all signatures are valid.

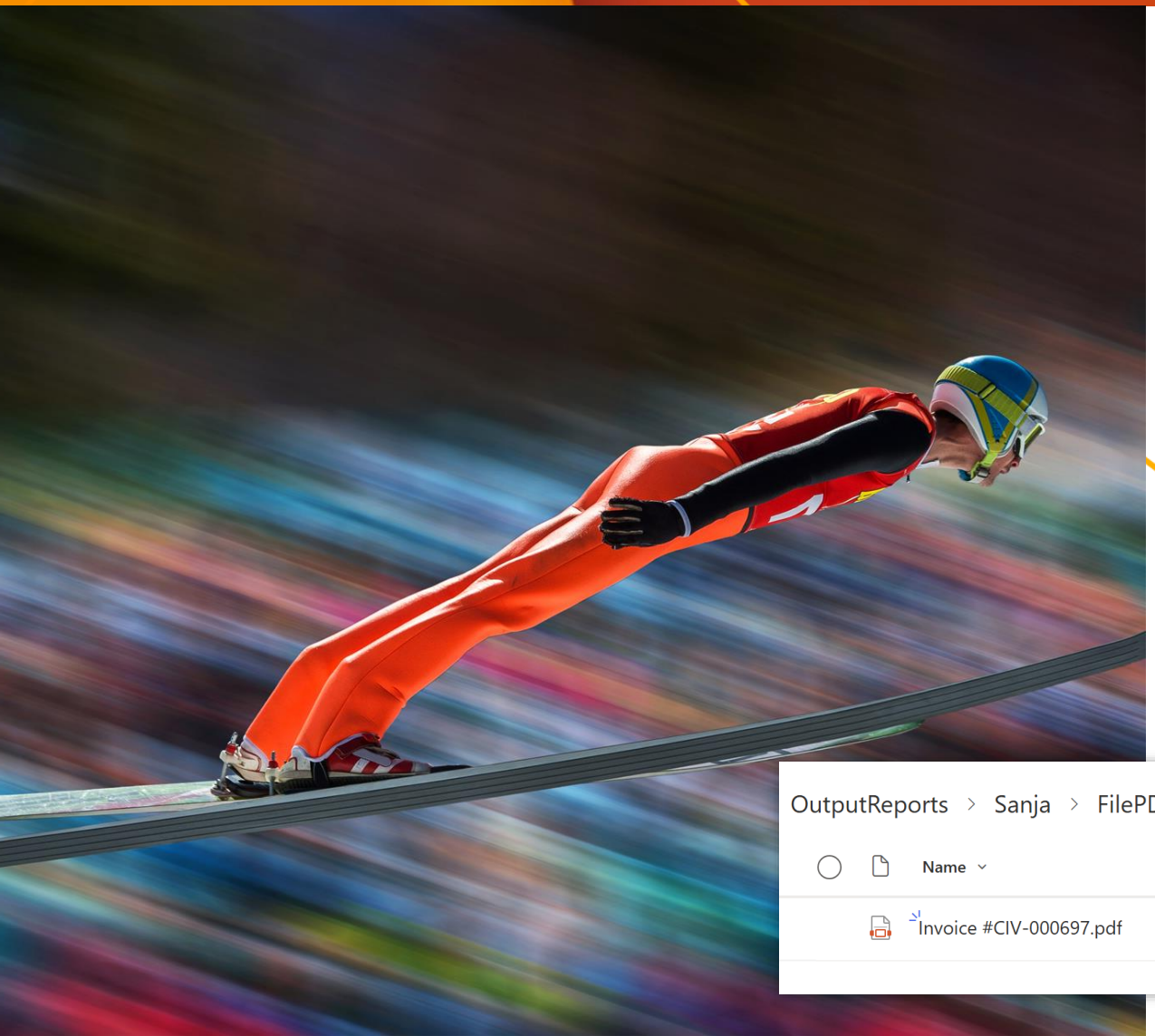
Signature Panel

	L0001	Mid-Range Speaker 2	6.00	ea	500.00	0.00	0.00	3,000.00
	P0001	Acoustic Foam panel	6.00	ea	37.00	0.00	0.00	222.00
	D0003	Standard Speaker	2.00	ea	220.00	0.00	0.00	440.00
	T0001	Speaker cable 10	6.00	ea	500.00	0.00	0.00	3,000.00
	D0004	High End Speaker	4.00	ea	2,000.00	0.00	0.00	8,000.00

Signer: Docentric demo 3.3.9
Reason: Invoice for US-026
Location: Some location
Date: Wednesday, May 28, 2025 12:52:16 AM

1

5. Saving to SharePoint With Metadata



Save to SharePoint *

Yes

Site URL: https://docentric....

Folder path: OutputReports/Sa...

Overwrite file if exists: Yes

Create non-existing folders: Yes

SharePoint settings | SalesInvoice.Report | Standard view

General

SharePoint site: https://docentric.sharepoint.c...

Document library: OutputReports

Is valid: Valid

Validation result

Upload with metadata fields

SharePoint metadata fields

Select | Delete | Placeholder list

Field	Description	Field data type	Is required	Placeholder
Description		Multiple lines of text		@PARAMETER_Document...
Customer Account ID		Single line of text		@InvoiceAccount@
Due date		Date and Time		@DueDate@
Invoice ID		Single line of text		@InvoiceId@

OutputReports > Sanja > FilePD > DM2005

Name	Invoice ID	Due date	Currency	Customer Accou...
Invoice #CIV-000697.pdf	CIV-000697	1/13/2017		US-026

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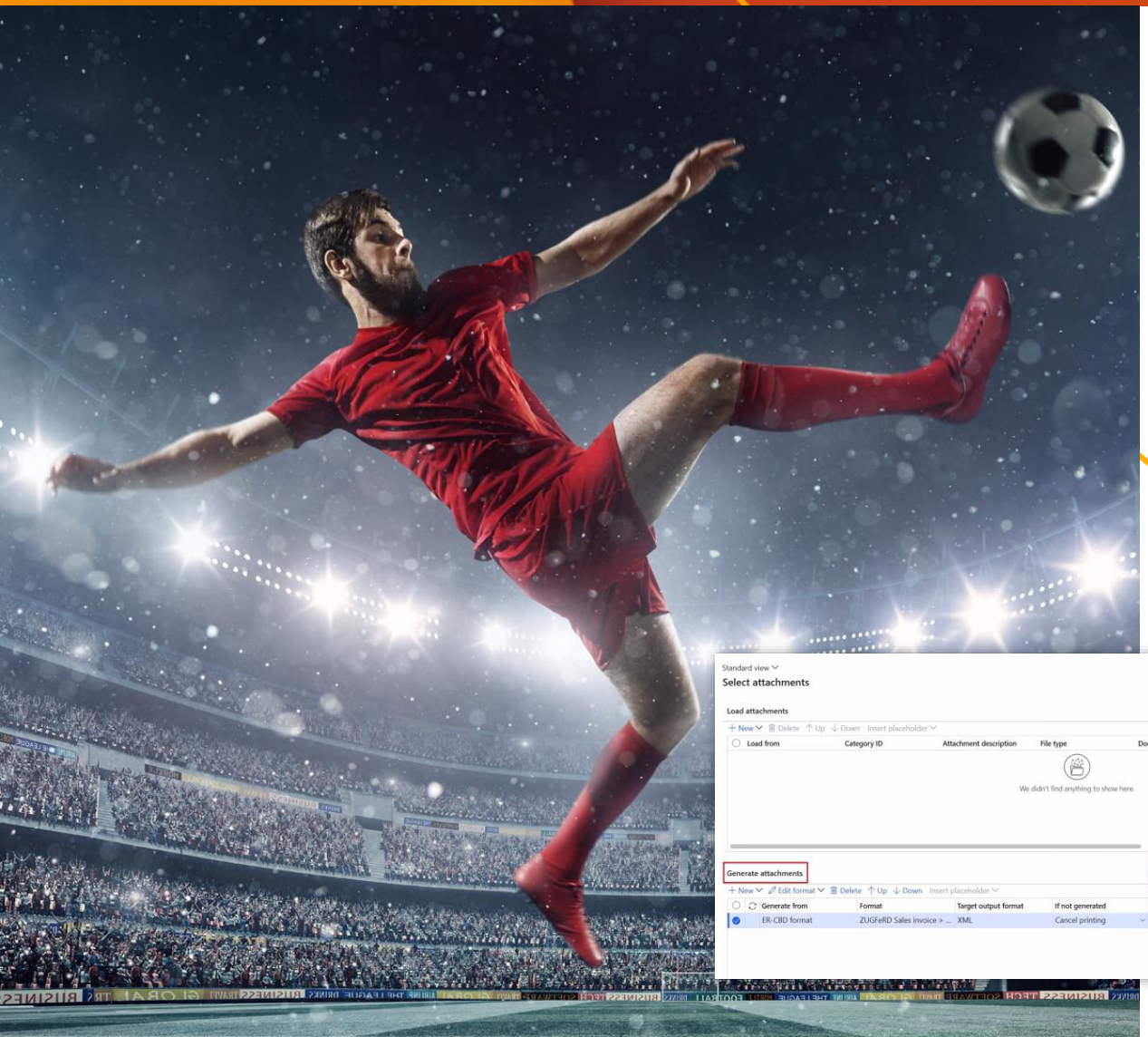
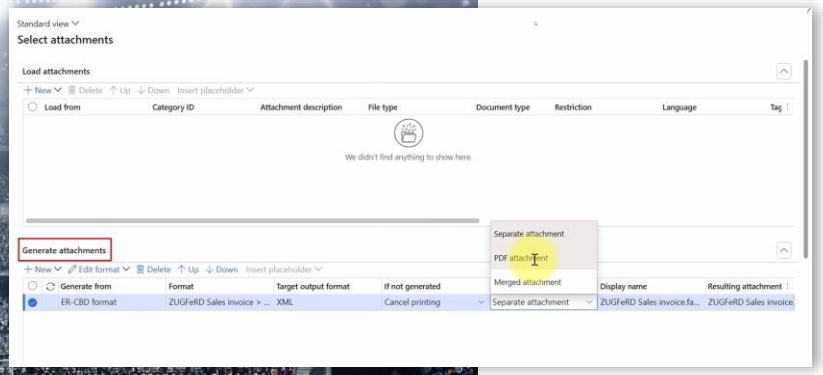
6. Manageable Print Management

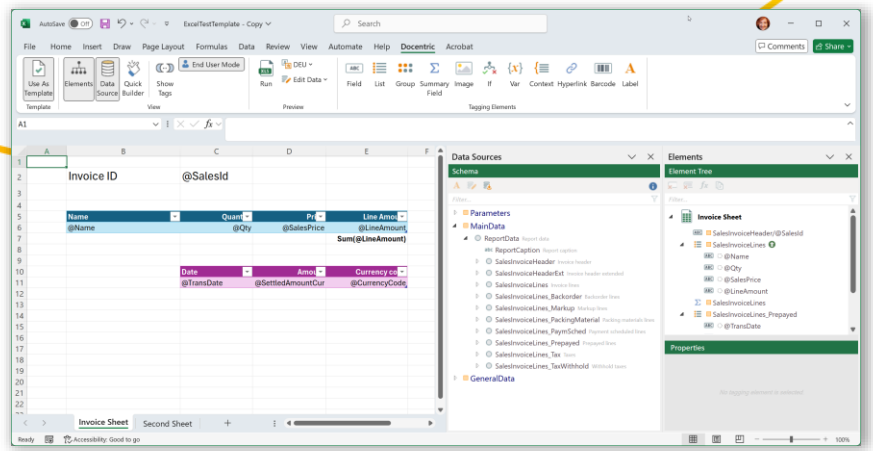
- Print management setup for all modules in one place
- Print management preview for common journals
- Print management data entity
- Print management utilities
- Trace Print management settings when running a report
- Added Back (Close) and Save buttons to Print management setup

7. Roadmap



- e-Invoicing building blocks
- Further adoption of ER-CBDs
- Additional attachments improvements (Generate From, Print as: Separate, Merged, PDF attachments)
- Excel designer + Excel output





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Thank you!

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