



TrinDocs for Microsoft Dynamics 365

Overview

The TrinDocs for Microsoft Dynamics 365 application will allow you to use the search feature to retrieve document images from the TrinDocs repository for select documents within Dynamics 365 Business Central. When you click on the “Search Image” page action, the image will be retrieved for the current document the user is viewing.

The pages that use the TrinDocs image search include:

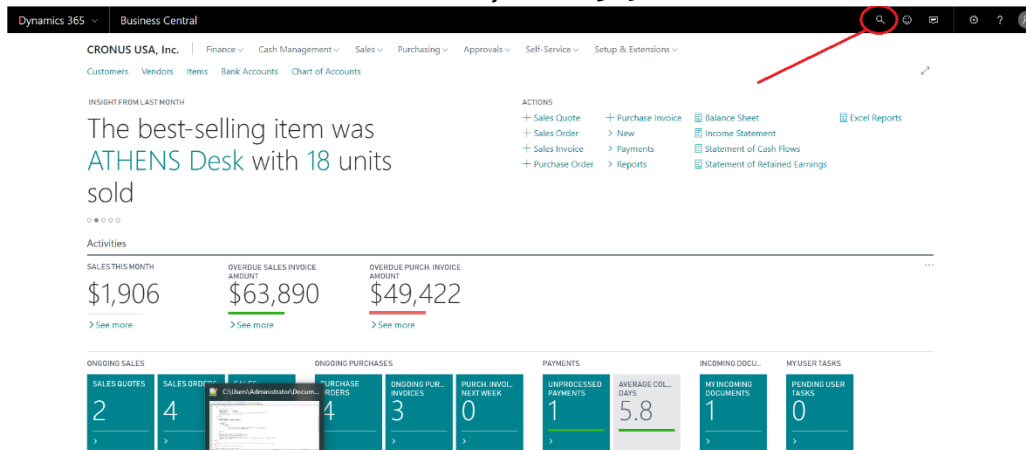
- Vendor Ledger Entry
- Purchase Invoice
- Posted Purchase Invoice
- Purchase Credit Memo
- Posted Purchase Credit memo

How to Guide

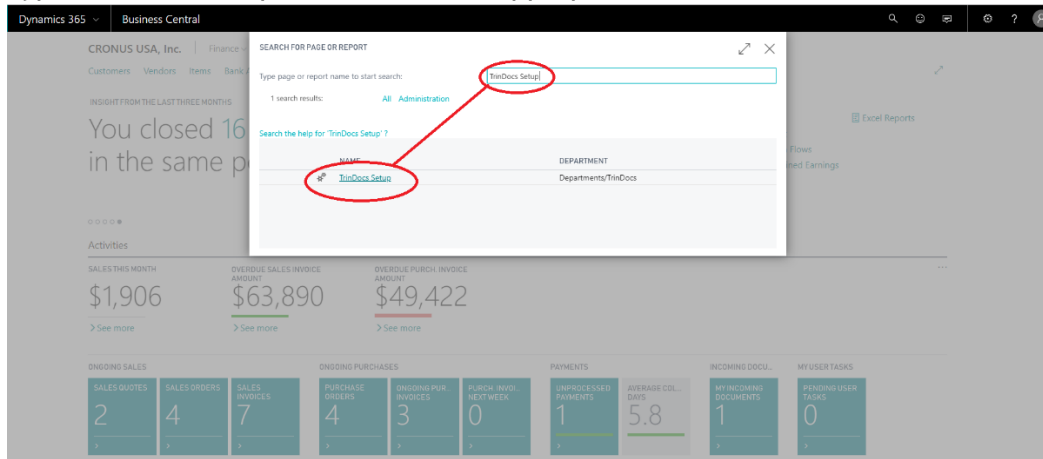
Setup

Once you have installed the TrinDocs for Microsoft Dynamics 365 extension, you will need to set up the hyperlink with your unique url. To do so, simply follow these steps:

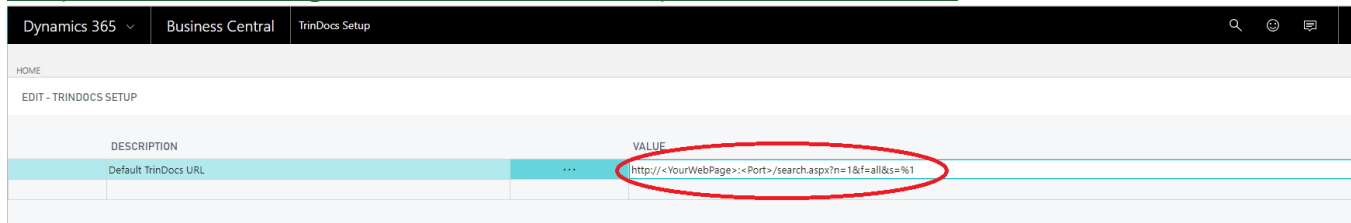
1. Locate and click on the search icon in Dynamics 365 Business Central.



2. Type “TrinDocs Setup” and click on the appropriate link.



3. In the TrinDocs Setup page:
 - a. In the Value field for the Description with “Default TrinDocs URL”, add your unique link in the format:
<http://<YourWebPage>:<Port>/search.aspx?n=1&f=all&s=%1>



- b. You may change the Description or leave it “Default TrinDocs URL”
4. Click the X at the top right to close the page.

Step-by-Step instructions

From any of the listed pages containing the TrinDocs “Search Image” page action:

1. These instructions are identical and apply to any of the following pages:
 - a. Vendor Ledger Entry
 - b. Purchase Invoice
 - c. Posted Purchase Invoice
 - d. Purchase Credit Memo
 - e. Posted Purch. Credit Memo

- From any of the above pages, click on the Navigate tab.

Dynamics 365 Business Central Purchase Invoices > 107209 · Fabrikam, Inc.

HOME ACTIONS **NAVIGATE** MANAGE LINE

EDIT - PURCHASE INVOICE - 107209 · FABRIKAM, INC.

107209 · Fabrikam, Inc.

General

Vendor Name: Due Date:
 Contact: Vendor Invoice No.:
 Posting Date:

Lines

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	QTY. TO ASSIGN	QTY. ASSIGNED
Item	1928-S	AMSTERDAM Lamp		5	PCS	42.80	FURNITURE		214.00	0	—

Subtotal Excl. Tax (USD): 214.00 Total Excl. Tax (USD): 214.00
 Inv. Discount Amount (USD): 0.00 Total Tax (USD): 12.84
 Invoice Discount %: 0 Total Incl. Tax (USD): 226.84

Invoice Details

- Click on the “Search Image” page action

Dynamics 365 Business Central Wide World Importers > Purchase Credit Memos > 1002 · Graphic Design Institute > Posted Purchase Invoices > 108036 · Nod Publishers > Purchase Invoices > 107209 · Fabrikam, Inc.

HOME ACTIONS **NAVIGATE** MANAGE LINE

EDIT - PURCHASE INVOICE - 107209 · FABRIKAM, INC.

107209 · Fabrikam, Inc.

General

Vendor Name: Due Date:
 Contact: Vendor Invoice No.:
 Posting Date:

Lines

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX	QTY. TO ASSIGN	QTY. ASSIGNED
Item	1928-S	AMSTERDAM Lamp		5	PCS	42.80	FURNITURE		214.00	0	—

Subtotal Excl. Tax (USD): 214.00 Total Excl. Tax (USD): 214.00
 Inv. Discount Amount (USD): 0.00 Total Tax (USD): 12.84
 Invoice Discount %: 0 Total Incl. Tax (USD): 226.84

Invoice Details

- If the url hyperlink has not been set up, then you will receive a notification with a link to the TrinDocs Setup page. Click the link and enter the appropriate url (See Setup #3 above).

Dynamics 365 Business Central Purchase Invoices > 107209 · Fabrikam, Inc.

HOME ACTIONS **NAVIGATE** MANAGE LINE

TrinDocs

EDIT - PURCHASE INVOICE - 107209 · FABRIKAM, INC.

✗ TrinDocs Setup is missing the url! Please add the url configuration before using this TrinDocs feature. [Add TrinDocs search url](#)

107209 · Fabrikam, Inc.

General

4. A web browser will open and bring up the appropriate document image, if found.

TrinDocs

Quotation 7670

Date: 07/27/18

Acct.No	Ordered By	Phone	Fax	P.O. No	Prepared By	Sales Rep
52	Jackie				Tim	Tim
Quantity	Description					Price
10,000	Bar Code Labels / Bluegrass Care Navigators - 1x.5					272.60

- a. You may have to supply the appropriate credentials to access the document.

TrinDocs

Username

Password

Login