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.

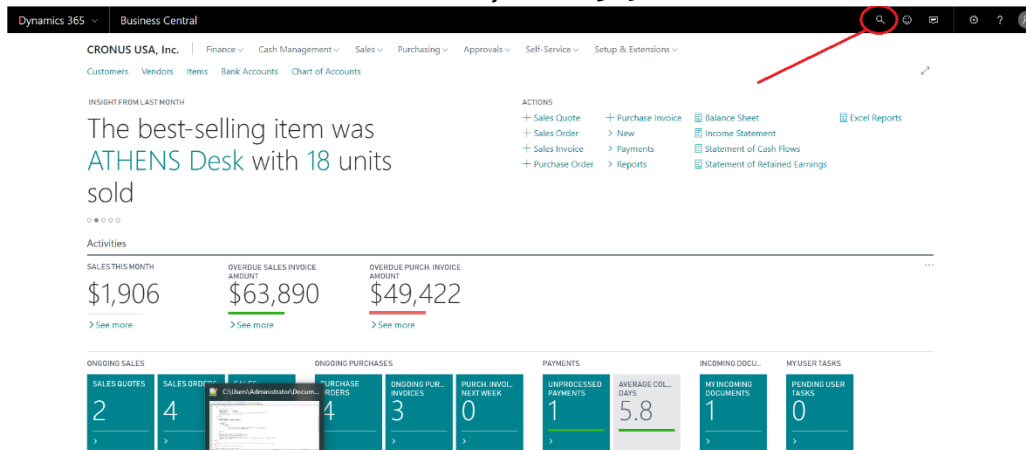The pages that use the TrinDocs image search include:

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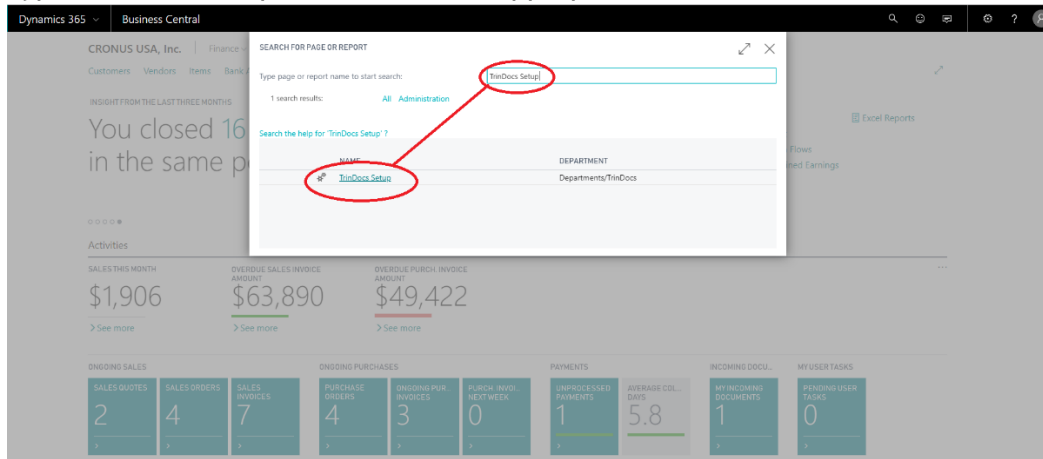- Posted Purchase Credit memo

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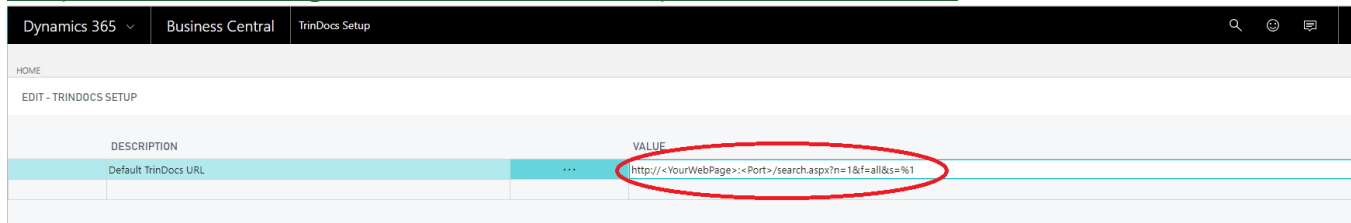
1. Locate and click on the search icon in Dynamics 365 Business Central.

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

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

3. Click on the "Search Image" page action

    a. 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).

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

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