



DocXtender

Quick Start User Guide

Version

Date	Author	Version	Change
August 1, 2019	T. Plett	1.0	Initial Version

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1 Using DocXtender

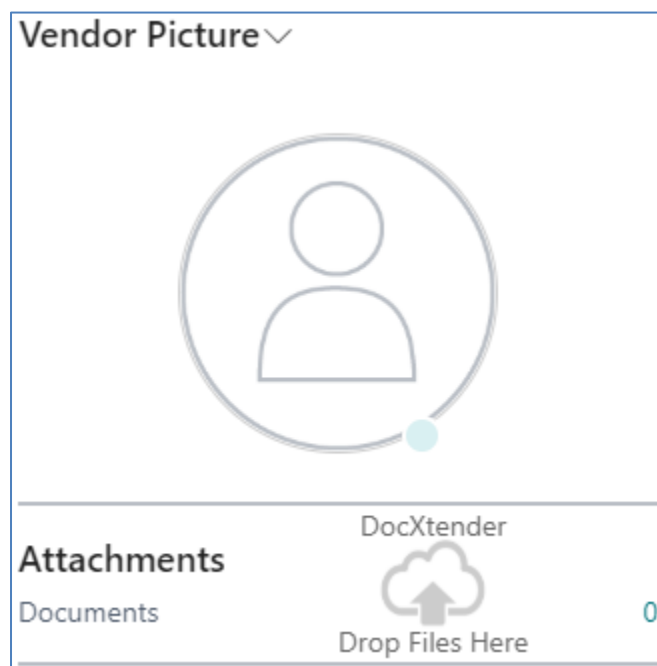
DocXtender can be used to attached files to most card, order and invoice pages in Microsoft Dynamics 365 Business Central.

For a user, apply permission 'DOCX-USER' to use DocXtender.

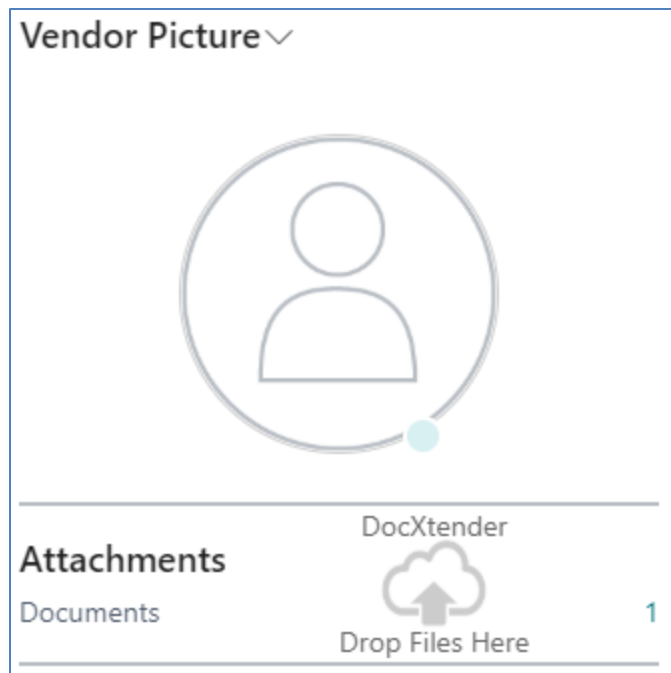
- Note: 'DOCX-USER' users will not be able to change settings. Your application administrator will need to grant access to the 'DOCX-SETUP' permission set to anyone that needs to change the behaviour settings.

To attach files to a record:

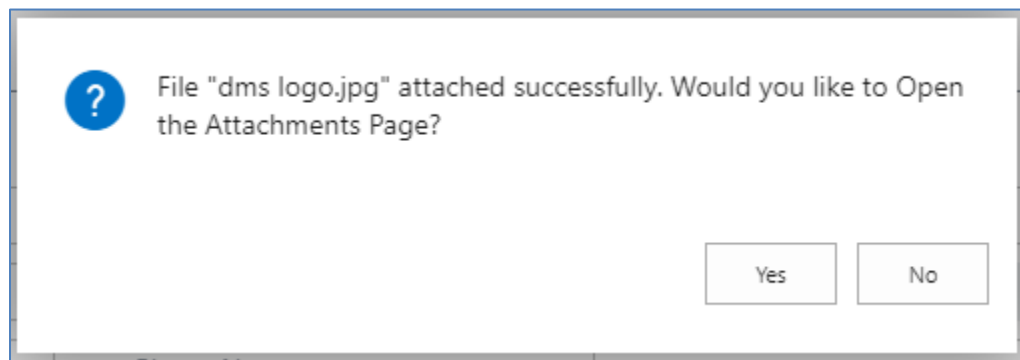
- Open a card, order or invoice (ie. a vendor card):



- Drag & drop any file onto the Attachments section of the vendor FactBox.
- The attached document count will increment by 1:



- If configured, you will get a confirmation asking if you want to view the file that was just copied:



- Click Yes or the document count link to open the list of attached files:

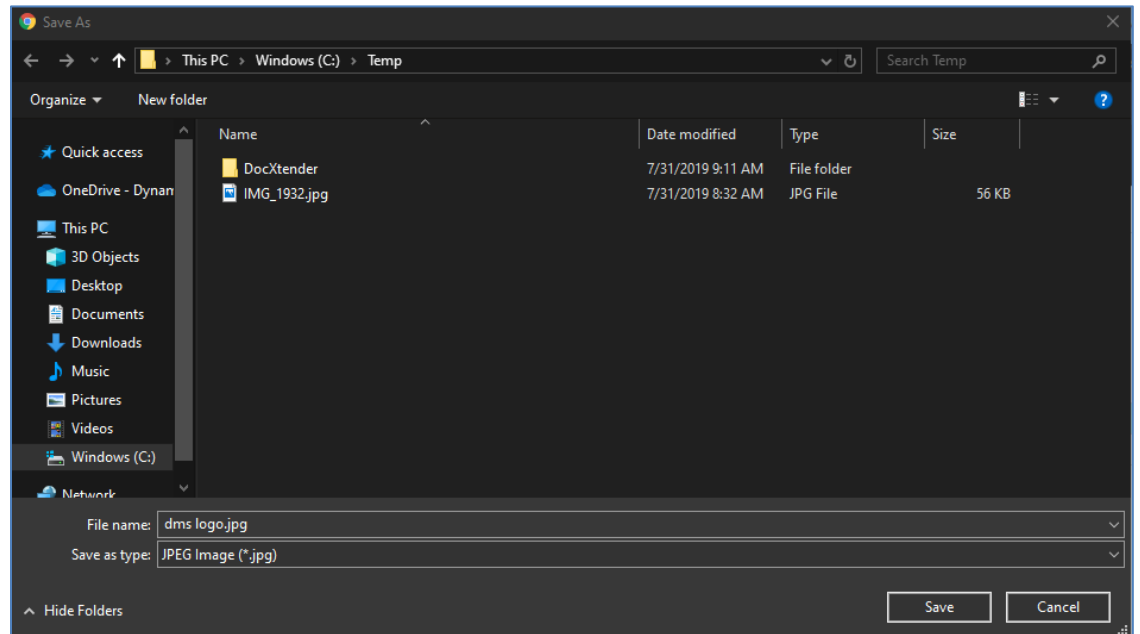
ATTACHMENT	FILE EXTENSION	FILE TYPE	USER	ATTACHED DATE	FLOW TO PURC... TRX
dms logo	jpg	Image	WSCHOCK	7/31/2019 9:21 AM	<input type="checkbox"/>

Manage Preview More options

EDIT - ATTACHED DOCUMENTS

Close

- Click on an attached document to trigger the file to download in the browser:



- If an attachment of the same name is copied to the same record, the system can be setup to prompt, automatically rename or block the duplicate file.