



User & Installation Guide

InterFormNG
Output Management

Microsoft Dynamics 365
Business Central

Version 1.0.0.0

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Introduction to InterFormNG

InterFormNG offers a range of options through connecting your Dynamics 365 Business Central to InterForm online output management services, like i.e.

- Schedule advertisement campaigns to be included on your documents
- Insert conditional information like warranty or shipping details
- Create Reminders with embedded link to Invoice
- Archive documents Electronically
- Sign Documents Electronically
- Automate daily outputs like Sales Reports

In this version 1.00, the functionality is limited to the following:

- Exporting a few “base” reports like Invoice and and Orders

Currently planned features for future versions include:

- Support for all “base” reports
- Customizing which data exported to InterForm
 - This will open up a whole new way of doing reporting and exporting Business Intelligence from Dynamics 365 Business Central
- Include distribution information like Contact information, E-mail etc.

This guide

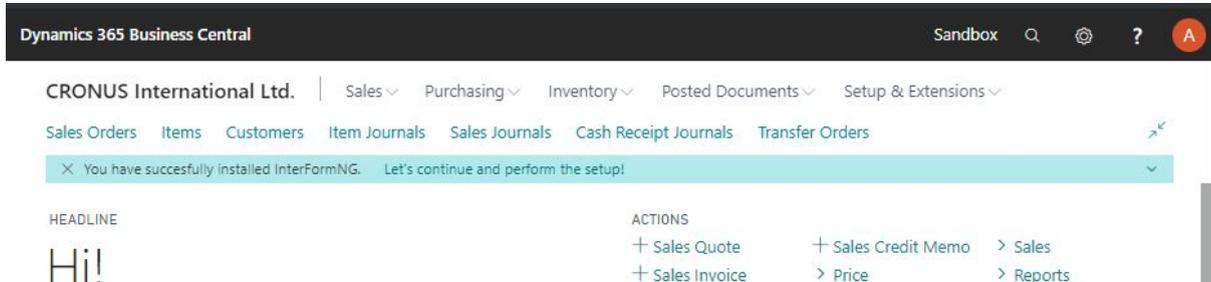
This guide will serve as both Installation and User Guide since it contains both the instruction to set up and demonstrate the program.

Perform initial setup

There are two ways of performing setup, both are described in the following.

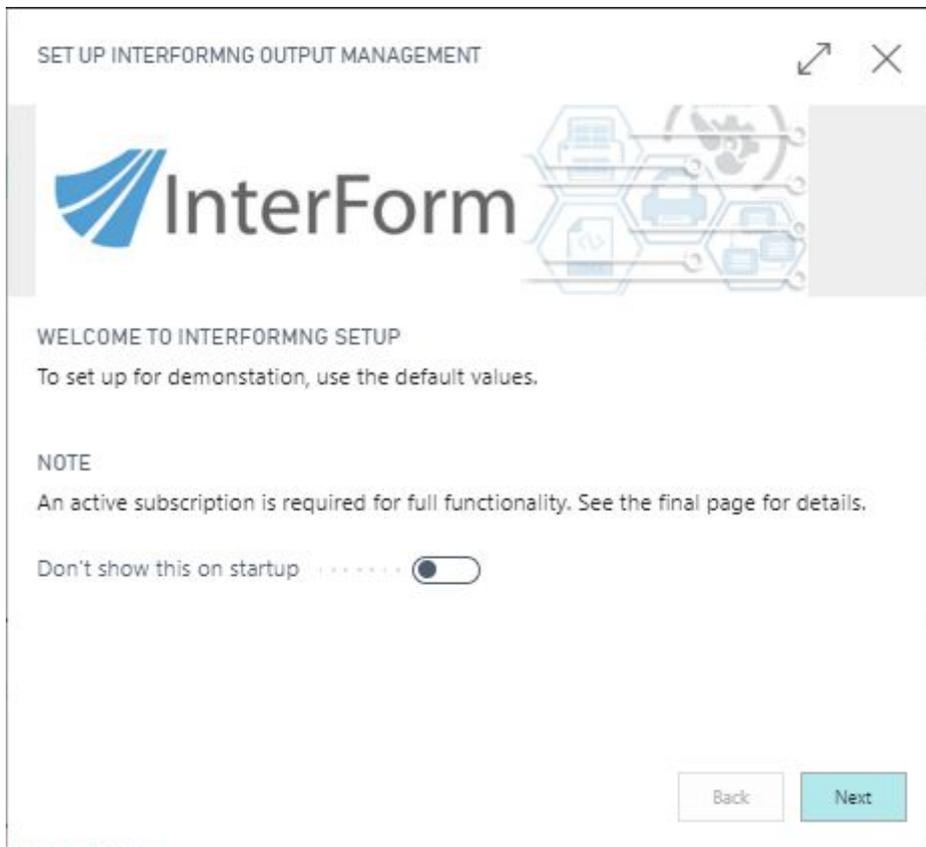
Guided setup

Click the banner on your Role Center



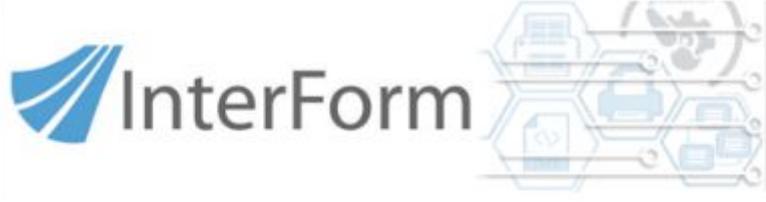
The guide will perform a setup ready for both demonstration and production should you choose to purchase the product.

Select "Next".



The connection details for demonstration use is prefilled.
 Replace them with your own if needed.

SET UP INTERFORMNG OUTPUT MANAGEMENT



Input the values given to you by InterFormNG or use the default for demonstration.

CONNECTION TO INTERFORMNG SERVICE

Connection URL

Preview URL

Connection Username

Connection Password

Select some Report types to be enabled for use with InterFormNG.
 Select "Next"

SET UP INTERFORMNG OUTPUT MANAGEMENT



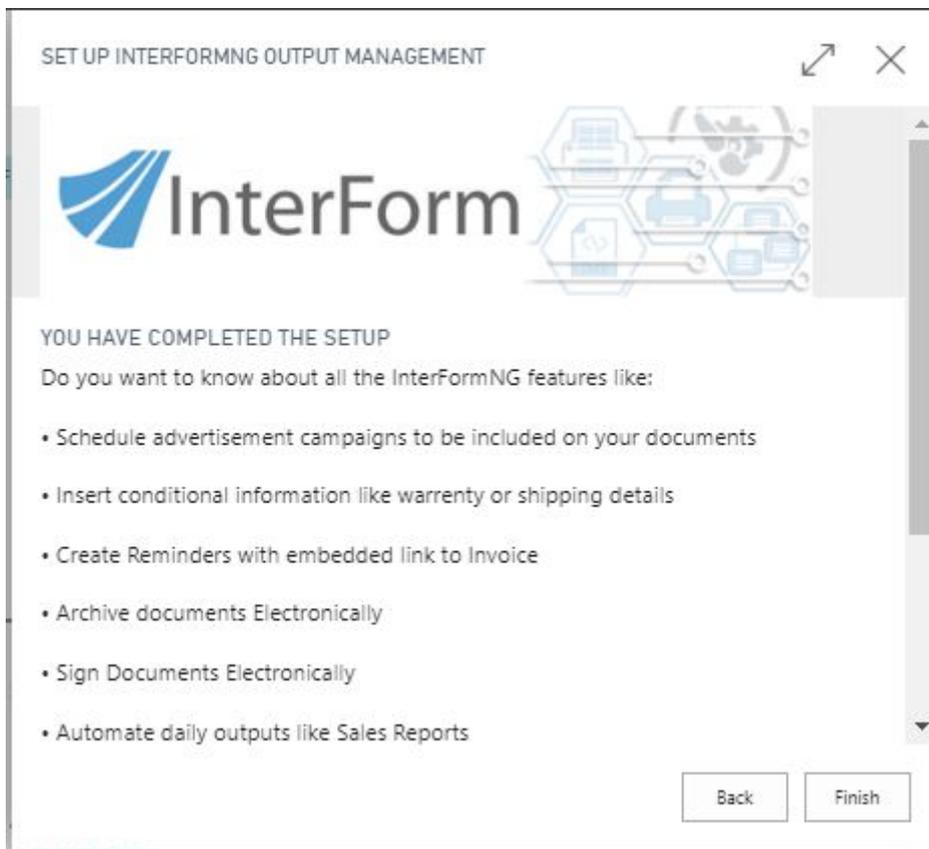
BASE REPORTING

Enable the reports you wish to use with InterFormNG.

InterFormNG Report Setup

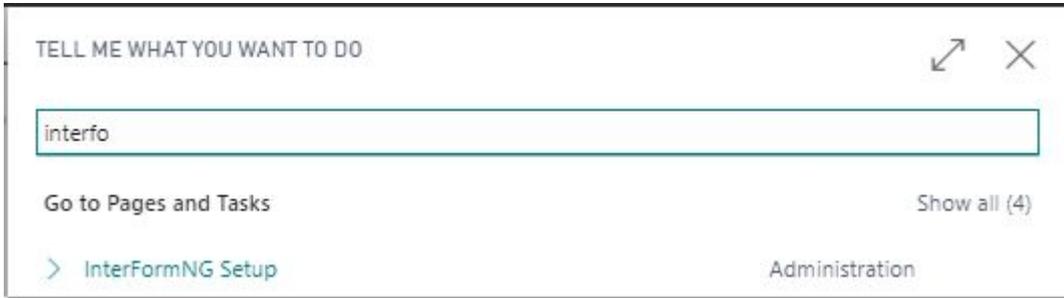
EN...	NAME	DESCRIPTION
<input checked="" type="checkbox"/>	Sales Order	Base BC layout
<input checked="" type="checkbox"/>	Sales Invoice	Base BC layout
<input type="checkbox"/>	Sales Invoice	Custom layout 01
<input checked="" type="checkbox"/>	Sales Credit Memo	Base BC layout

Select "Finish".



Manual setup

Go to "InterFormNG Setup" page.



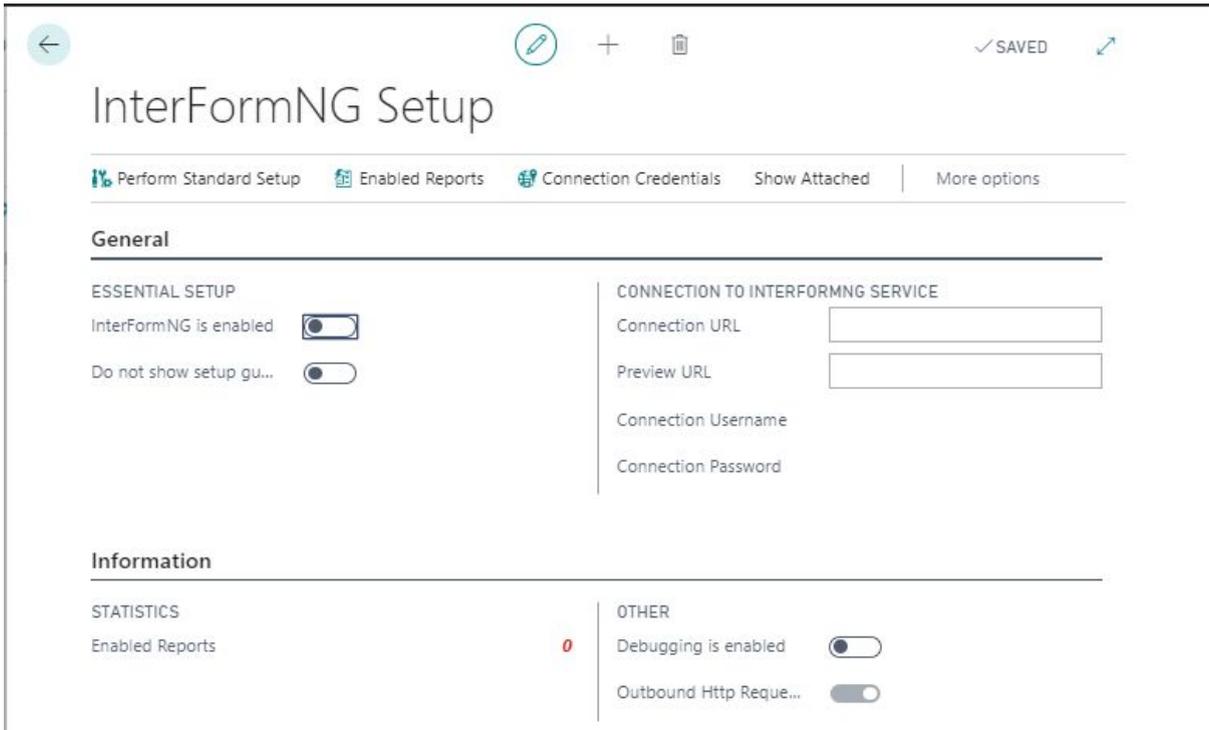
TELL ME WHAT YOU WANT TO DO

interfo

Go to Pages and Tasks Show all (4)

> InterFormNG Setup Administration

Select "Perform Standard Setup" action.



InterFormNG Setup

Perform Standard Setup Enabled Reports Connection Credentials Show Attached More options

General

ESSENTIAL SETUP

InterFormNG is enabled

Do not show setup gu...

CONNECTION TO INTERFORMNG SERVICE

Connection URL

Preview URL

Connection Username

Connection Password

Information

STATISTICS

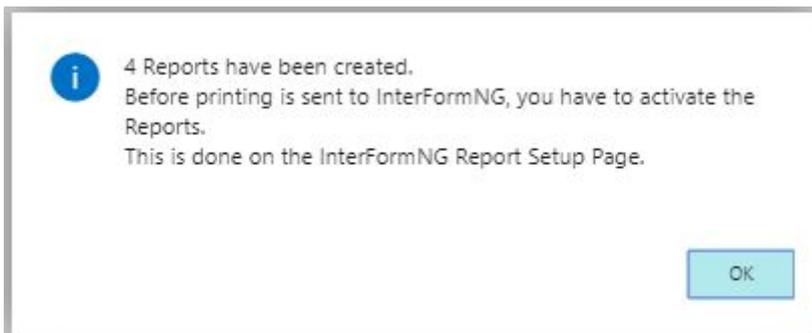
Enabled Reports 0

OTHER

Debugging is enabled

Outbound Http Reque...

Click OK the this message.



i 4 Reports have been created.
Before printing is sent to InterFormNG, you have to activate the Reports.
This is done on the InterFormNG Report Setup Page.

OK

Select some Report types to be enabled for use with InterFormNG.
Close the page.

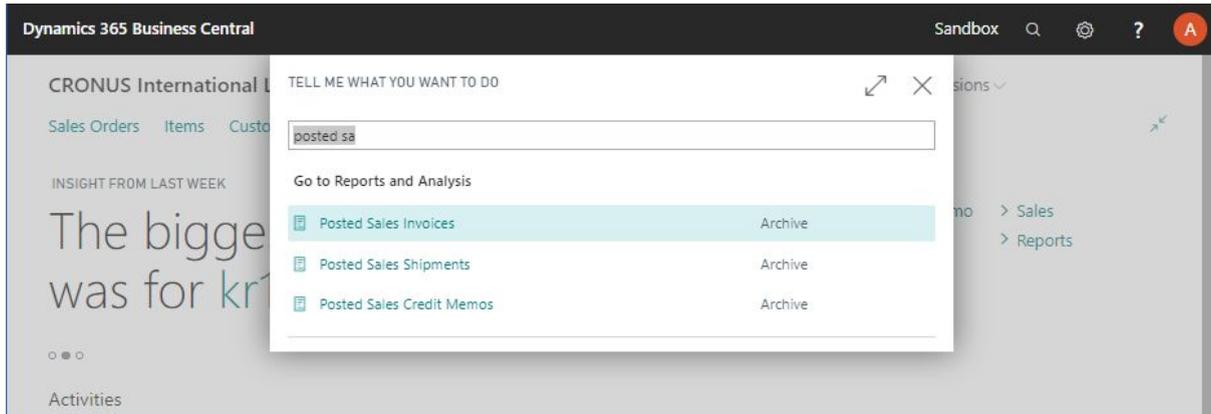
← INTERFORMNG REPORT SETUP | WORK DATE: 1/28/2021
SAVING... 

 Search
 Edit List
 Perform Standard Setup
Show Attached
 Open in Excel
...
 

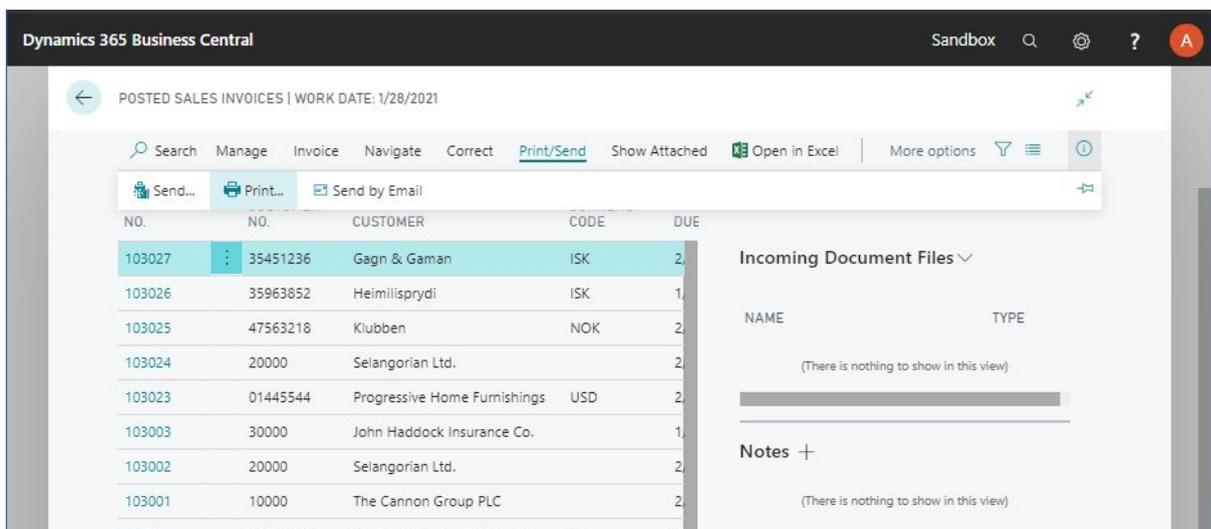
ENA...	NAME	DESCRIPTION	INTERFORMNG LAYOUT
<input checked="" type="checkbox"/>	Sales Order	Base BC layout	rest/generatepdf/Dyn365BCsalesOrd...
<input checked="" type="checkbox"/>	Sales Invoice	Base BC layout	rest/generatepdf/Dyn365BCsalesInvo...
<input type="checkbox"/>	Sales Invoice	Custom layout 01	rest/generatepdf/Dyn365BCsalesInvo...
<input checked="" type="checkbox"/>	 Sales Credit Memo	Base BC layout	rest/generatepdf/Dyn365BCsalesCrM...

Perform a test drive

Search for “Posted Sales Invoices”

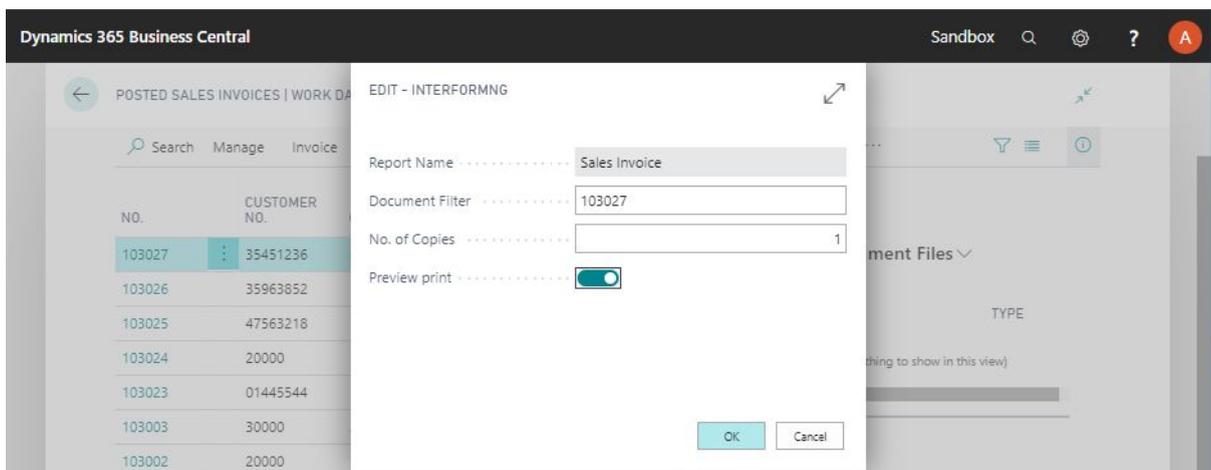


Select “Print/Send”
Select “Print”



Instead of the regular request page, the following print dialog will appear.

Select “Preview print”
Select “OK”



You will now see the preview of your document, formatted by the InterForm service.

Contact InterForm for installing connection to you local printer and gain access to the layout editor!

fdftHTEzW874eMFKsVPG.pdf
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TEST TEST



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Reykjavíkurveg 66
IS-220 Hafnafjörður

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Invoice
CRONUS International Ltd.
5 The Ring
Westminster
W2 8HG London

Bill-to Customer No. 35451236
Invoice No. 103027
Order No. 101008
Document date January 28, 2021
Due date February 28, 2021
Payment Terms 14 DAYS
Partner Type
Shipment Method EXW
Shipment Agent Code UPS
Package Tracking No. 35531791111

Salesperson
Phone No. 0666-666-6666
Bank World Wide Bank
Giro No. 888-9999
IBAN GB 12 CPBK 08929965044991

No.	Description	Shipment Date	Quantity	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
1992-W	ALBERTVILLE Whiteboard, green	01/20/21	1	97,960.004	0	88,164.00
Sub total						88,164.00
Total incl. VAT ISK						88,164.00