

# Avanade Text Management

Enhance any ERP object and process with valuable content



**Avanade Text Management enables companies to save time and improve their accuracy, consistency, and compliance. The solution allows business users to create blocks of texts once and repurpose and recombine them to accompany any object and process in the ERP system as digital content, verbiage on documents, warning messages, or by linking them.**

When users manage products, materials, orders, sales, distribution, suppliers, shipping services and other entities in Microsoft Dynamics 365, they often must type and rekey the same text. Important information for co-workers may need to be transferred through email, phone calls, or messaging services outside of ERP. These inefficiencies nibble away at productive time. It becomes challenging to ensure accuracy and completeness. Often, important notes are forgotten, critical details are omitted, people make mistakes, or the verbiage is not displayed in process steps where it needs to be seen.

## Simple, flexible management of text blocks and bundles

Avanade Text Management extends the standard of Microsoft Dynamics 365 for Finance and Operations to enable one-time creation and unlimited reuse of saved chunks of text. The solution is helpful whenever you want to add verbal information to an object or process step in the ERP system. It is frequently used when companies manage orders, purchase requisitions, warehouse transfers, shipping, and production.

In Text Management, you type a text just once and save it with the applicable definitions. You decide which object needs to include additional verbiage, and on which form and in which position on the form the block of text will appear and whether it needs to include a linkage to another text block appear. If the same text needs to be seen by people who manage consecutive processes, you can set it up to be inherited from one process to the next. For example, you can include the instructions for specialized packaging that a customer pays for in the bill of sales, the invoice, the picking and packing forms for the warehouse and shipping services.

In addition to inserting verbiage or linkages to it on forms and items, you can configure text to appear as an on-screen alert at certain process steps. You can also bundle texts and let them be inherited together.

If you set up a text with a date range, it will appear on forms and in processes only within those dates. You can save texts with intuitive names and group them by themes or business area that make sense to users in your organization. When you originally created a text in several languages, the solution automatically picks the version that fits the language of your transaction.

## Easing regulatory and business rules compliance

Companies rely on Text Management to ensure compliance with business rules, contracts, and regulatory requirements as they manage processes and information. Typical usage scenarios include efficient, accurate completion of customs or financial forms, or prompt disclosure of sensitive materials and products in production and distribution.

Text Management is fully embedded within Microsoft Dynamics 365 for Finance and Operations. Most customers acquire the solution with the Dynamics standard. Users are generally unaware of Text Management as an add-on tool.

To learn more or see a demo, contact us at [mail@avanade.com](mailto:mail@avanade.com). Visit [www.avanade.com/en/technologies/microsoft-dynamics-365](http://www.avanade.com/en/technologies/microsoft-dynamics-365) for customer stories and updates about our offerings for Microsoft Dynamics 365.

## Key Benefits

- Ensure accuracy and consistency in providing important information to employees.
- Simplify compliance with business rules, contracts, and regulatory mandates.
- Allow employees to perform at their best level, and avoid worker burnout and distraction.
- Improve the customer and partner experience with more reliable, fast, and efficient communications and services.

