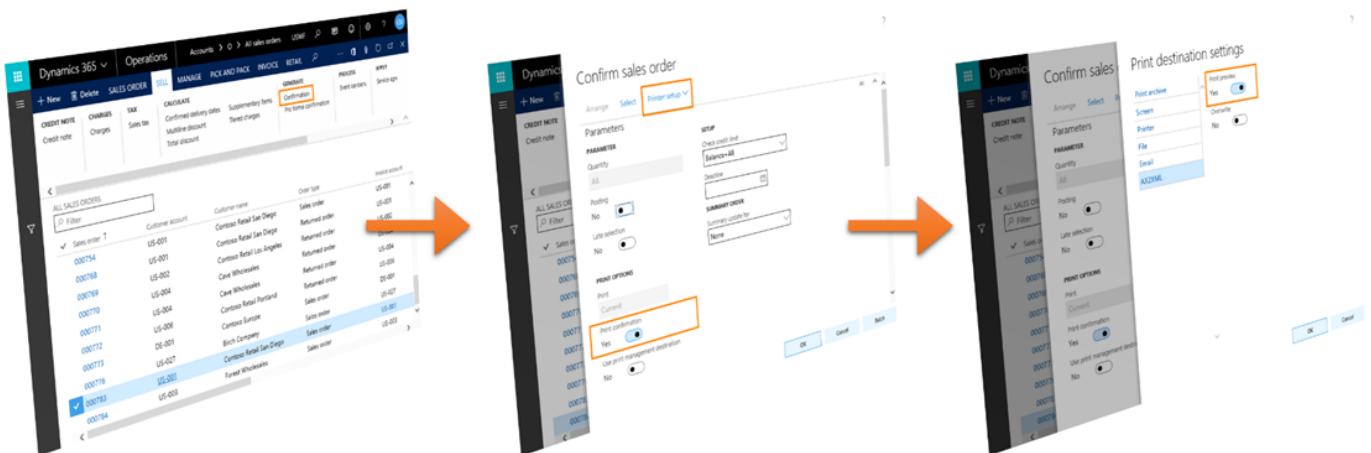# Exstream Document Output connector

Dynamics 365 Finance &
Dynamics 365 Supply Chain Management

The Exstream Document Output connector for Dynamics 365 for Finance and Supply Chain Management is a document output framework that operates within Microsoft Dynamics 365.

Exstream Document Output takes over the integrated reporting service in D365 for selected operational documents. It captures all reported data including labels and metadata, and exports this data in an universal and comprehensive XML file for further processing. These XML documents are interpreted and processed by OpenText Exstream (or previous Streamserve versions). OpenText Exstream is able to process (and archive) the XML files on the fly into a customer centric communication using as well digital as printed channels. This facilitates streamlining and automating your customer communication.

In short

- Print destination "Exstream document output" for final or preview printing.
- Framework includes and uses all available business logic.
- The XML data and metadata are provided in the applicable document language.
- The framework allows you to easily add XML data to existing and new documents.
- Use a local fileshare or Azure file storage for interfacing with OpenText Exstream.
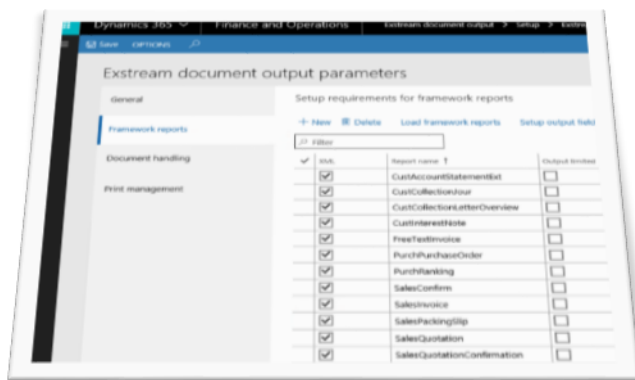
Exstream connector for Dynamics 365

The connector integrates with standard D365 Finance and Supply Chain Management print management and the regular post / print dialogs for a seamless experience. This results in a very limited footprint regarding changed business logic, and provides a seamless user experience, since all data required for reporting is included. Generated documents can be imported into D365 in order to save the formatted output for later reference.

By moving document formatting towards Opentext Exstream, more customer centric reporting is possible. Time-consuming layout modifications in Reporting Services of D365 are avoided, since report design is outsourced to a best-of-breed solution that can be maintained by your own organization.

Generated XML documents contain report metadata and data. Besides the included document stack, which supports most common external operational documents, the framework provides ability to easily modify existing documents and add new documents

and reports. Out of the box, next commonly used operational documents are included: sales quotation, sales quotation confirmation, sales order confirmation, sales order packing slip, sales order invoice, free text invoice, customer account statement, customer collection letter, customer collection letter overview., customer interest note and the purchase order confirmation.

Advantages

- Single and unified investment for all your D365 reports and documents.
- Minimal maintenance.
- The complete layout, formatting, distribution and storage of supported operational documents is completely moved from D365 to an external tool.
- Through the connector, all supported operational documents are provided electronically to customers and can also be imported into host systems.
- All available data provided in the standard AX output document is included in the XML file.
- The connector is fully developed and integrated in D365 (and previous versions of Dynamics AX).
- Newly defined or customized documents and reports can easily be added.

Requirements

- Dynamics 365 for Finance and Supply Chain Management Dyment
- In2Scope Exstream connector
- OpenText Exstream (Streamserve)