### Document Information

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<tr>
<td><strong>Author(s):</strong></td>
<td>Utsab Basu</td>
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### Document Revision History

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1. Introduction

Microsoft Dynamics 365 for operations contains Document management functionality, which improves the use of homogenous texts in the application. However, the standard application does not provide the ability to change the text in multiple languages. In addition, we cannot store any template centrally, through which we can change the text for every single note.

In order to manage the text templates centrally and to manage the text of templates in multiple languages, Avanade has expanded the standard document management asset with the "Text Management" module. This functionality also provides the printing control possibilities. This document provides information on how to configure and use the features included in the Text Management.

2. Audience

This document's audience is end users, typically employees who are involved in the document management activities. As text management is an extended feature of standard document management of Dynamics 365 for Operations, any user who is involved with the document management activities will find it helpful.

3. Scope of services

The 'text management' is a self-contained module, which is attached to the document management. The user has the possibility to select text templates from an archive with standard texts and copy it into notes in the document management, or to generate links to texts.

Features in detail:

Text templates can be recorded in several languages.
Text templates can be configured for several areas like Purchase, Sales, and Items.
Tables are allocated to the individual areas. Depending on the table from which the text management is accessed, it is filtered according to the relevant area.
Text templates can selectively be copied or linked.
Linked text templates can be managed centrally. That means that changes will be transferred to all linked notes.
A text template can also be inserted in an existing note at the beginning or end.
It can also be determined, on which paper a note should be printed. In addition, the position on the report (top or bottom) can be determined.
Notes can be copied from various modules. For example, it is possible that the notes of a debtor are taken over automatically (or after confirmation) in the sales order at the generation of a sales order.
Notes can be defined as warning messages. Thereby notes, e.g. at the generation of a sales order, are displayed as warning messages.
4. Setup Text Management

This chapter describes the configurations and functions of the text management module. The menu option is available at below path:

Organization administration ➔ Document management.

4.1 Text Management

In the following chapter, every menu option in the Text Management module is explained.

Path: Organization administration ➔ Document Management ➔ Text Management
4.1.1 Text templates

On the left side of this window, you see the saved text templates as well as the different languages of them. With a click on a text template, you can see the text template area.

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text templates

You have the possibility, in the menu Text templates, to display the language text by selecting the according language code. The menu General provides general information about the text template as well as the number of linked notes.

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text templates
If you click on the button Show links, a new window will open. In this window, all the links of the text template are displayed. With this function, you will have the overview, where the template is used. By clicking on the Reference record ID, the related table will open and the linked record will be shown.

### 4.1.2 Text template links

This view shows all text templates, which have at least one linked record. If you click on a text template, all links of the specific text template will be shown in the submenu References. You have the possibility to display the linked record by clicking on the Reference record ID.

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text template links
4.1.3 Text template areas

Text templates are divided into several areas for the ease of use. You have the possibility to select tables for each area. This selection corresponds to a filter: e.g. on the form PurchTable, only the text templates whose area has PurchTable in Selected tables list will be shown. The user will also get an option to change this filter, where user can select text templates from other areas.

Path: Organization administration → Document Management → Text Management → Text template areas

On clicking “Add tables” link, list of all tables will be populated & user can select the appropriate tables as per the Text template area.
4.1.4 Text template languages

All language codes, which will be used for at least one text template, must be added in the text template languages. Once a language code has been added, it will appear on the text template form. Only defined language codes can be used in text templates.

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text template languages

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text template
4.1.5 Text management parameters

This section explains the setup of parameters for Text Management module.

Path: Organization administration ➔ Document Management ➔ Text Management ➔ Text management parameters
This setup controls the standard document type for new created text templates. It is possible to override this setup.

This setup controls the display and editing of text templates. Here All means every user will have privilege to see & edit the text templates. User option suggests that only that particular user (who has created the text template) will have the ability to see & edit the text template.

If text templates are in different languages, then as per the selected area, under this section, the language of the template is synchronized. **Note:** User has to take care of the fact that he/she is attaching the text template of the same language as mentioned in the setup section of sales order, purchase order, item, vendor or customer.

This form will be used to define the number sequences for Text Template number & Category.

*Path: Organization administration ➤ Document Management ➤ Text Management ➤ Text management parameters*
4.2 Document types

Path: Organization administration ➔ Document Management

In the menu document types, there is one control option added as Text management. The following section explains this feature.

Path: Organization administration ➔ Document Management ➔ Document Type
Controls the printing of notes:
- **Internal**: only internal papers
- **External**: will be printed on external papers (e.g., invoices)

This setup validates the display of the text in different papers as per the selection. User can override this setup while creating a new text template.

Controls the printing position of the notes.
E.g., User can print the note either on the invoice header (top) or in the invoice footer (bottom). User can override this setup while creating a new text template.

Controls the inheritance of the notes from one area to another.
4.3 Form Note

In the form note section of accounts receivable or accounts payable setup, user can also specify the from date & to date of the form note. In this case, that particular form note will be valid within the specified time period. This is a customization of the standard Dynamics AX feature.

*Path: Accounts receivable ➔ Setup ➔ Forms ➔ Form notes*

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5. Tutorial

5.1 Text templates

5.1.1 Create new text templates

Perform the following steps to make a new text template while creating a new text note:

Click on the attach button in the top right corner of the screen of any customer, vendor, purchase order, sales order or item.
A new screen will get opened & then click on the Note in the New button to create a new note.

After creation of the note, click the Text templates button & select “Save as new text template” to save the newly created note as a text template.

Click on the Ok button to create new text template.
The application navigates to Text templates screen where the note is saved as a new text template. The user will also be able to select the area & language of the template.

5.1.2 How to use text templates

To use any existing text template first click on the attachment & then click on the Text templates button & click on Use.

The application navigates to Text templates form and user will be able to see all text templates for the particular area from where he/she has clicked on the attachment button. If the user clicks on the attachment button from Purchase Orders & the Purchase Area is defined in the text template areas for PurchTable, then only text templates related to Purchase area will get opened. The user also has the ability to see all text templates using the filter button.
User will click on the Create note button & can click on copy or link as required. User will have the possibility to create a copy or to create a link of the text template.
5.1.2.1 Change copied notes into links

Click on the Text templates button from an existing copied note & then click on the Use button.
Click on the text template and choose in the field Language, the Language code of the actual note (attention: you have to be on the correct text template). Click on the button Link to note to change the copy into a link.

Attention: If you change a copied note into a link, it will take over the text of the template. All changes that were made at the copied note will be lost. From now on, text changes only can be made in the text templates.

### 5.1.2.2 Change linked text templates into copies

The user cannot change the text of a linked note. In order to change the link into a copy, you just have to click on Text templates – Break link. User now has the possibility to change the text of the copied note. However, those changes will not transfer to the text template.
5.1.3 Insert/replace text templates into existing notes

User has the possibility to insert the text of a text template into an existing note. Click on an existing note on Text templates -> Use and a new screen is displayed.

With a click on the button Copy to note you can paste the text of the text template before or after the text of the existing note. User also has the possibility to replace the note text with the text of the template.
5.1.4 Edit text templates

To edit text templates, user just has to overwrite the text. If user wants to change the text of another language, just select the according language code & then he/she can edit the language text.
5.1.5 Delete text templates

To delete a text template, just click on the button Delete. User can delete only those templates for which there are no links. If user wants to delete a linked text template anyway, then he/she has to delete all links of the relative text template first. If user wants to see all existing links, he/she can click onto the button Show links.

5.2 Warning notes

Warning notes are special variants of notes. User can click on the attachment button of the customer, vendor or item and can create a new note. To create a warning note, just set the flag on the check box Warning note. The remaining settings are unimportant. Please note that the column Warning note is visible only in the CustTable, VendTable and InventTable.
The user will be able to see the note as a warning message while creating a sales order or purchase order of that particular item.

If the user configures a warning message for the customer or vendor, warning message is displayed at the notification section while creating a sales order or purchase order as shown below.
On the following table, we can see on which places the warning notes can be deposited and where they will be shown. The “X” shows, where the user can see the warning notes.

<table>
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<tr>
<th>Warning note is deposited on:</th>
<th>Sales order (asset)</th>
<th>Sales order (price)</th>
<th>Sales offer (asset)</th>
<th>Sales offer (price)</th>
<th>Purchase order (asset)</th>
<th>Purchase order (price)</th>
<th>Production order</th>
<th>Project module</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor base</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product base</td>
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<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

5.3 Use with the project module

In the case of sales or purchase orders, the inheritance of text templates to forms is clear and simple. The project module is much more difficult, because bookings from different areas should be printed on the same invoice.

*Path: Organization administration ➔ Document Management ➔ Document Types*
User has the possibility to make the settings for the printing and transfer rules in the document types. If user set both flags, the notes will be printed and transferred as follows:

In the project module user has the possibility to edit all deposited notes at the invoice proposal (before the invoice is booked).
5.4 Printing linked files

Another functionality is the possibility to print linked files together with other documents (e.g. sales order confirmation, packing slip, invoice etc.). This functionality sends the files, which are included in the print order to the standard programs. This corresponds to the default Windows functionality.

6. Installation

6.1 Requirements

Model file and License file should be installed in the standard Dynamics AX for accessing this functionality.
6.2 Configuration