

Advanced Document Reporting

create and print up to 20 different types of documents using only 5 reports in Microsoft Dynamics 365 Business Central

Advanced Document Reporting

App for Microsoft Dynamics 365 Business Central



Create and print up to 20 different types of documents using only 5 reports in Dynamics 365 Business Central.



Do you need to save / send different types of document? Do you want to be able to define different layouts for the same document, by quickly modifying the header and footer of the document (e.g. extended texts, comment lines, tracing lines, etc.)? Do you want to be able to send the documents massively to predefined addresses?

How it works

The Advanced Document Reporting app allows you to create and print up to 20 different types of documents using only 5 reports.

It allows to:

- define different contents for the same document (hide or show prices, comments, extended text...)
- edit the document header, the footer, the report title through setup
- extend the standard functionality of sending email documents



Quick Guide

Ready to go in 4 steps

1. Set up reports (via Quick report selection) and layouts
2. Configure one or more mailboxes
3. Define texts and email addresses
4. Send or save documents



Advanced Document Reporting allows for example to define advanced setups related to the recipients and the body of the email through extended texts or HTML templates.


Supported Features

The app simplifies the loading of data that is normally printed on documents.

- Allows you to print line and header extended texts
- Allows you to print tracing lines (if present)
- Allows you to print Cross-reference ("Item Vendor-No." e "Item Customer-No.")
- Allows you to print standard header and footer images

Print example

EOS AG / SpA
Sitz/Sede legale
Via G. Di Vittorio Strasse 23
I-39040 BOZEN/SÜDTIROL
Tel. +39-0471-319699
Fax +39-0471-319699
www.eos-solutions.it



Indirizzo fatturazione
Grafiche magiche 2000
Sig. Ivan Gagliardi
Via Valletta 132
26100 Cremona
Italia

Fattura


Nr. 21-102030	Data 28/01/2021	Agente Gabriele Cannata	Benca di Canalicazione	Pagina 1/1
Ric. cliente 20000	Contatto Sig. Ivan Gagliardi E-Mail sig.ivan.gagliardi@contoso.com	Cond. Pagamento 14 GG data fattura	Causale del trasporto	
Codice fiscale 254687456	Int. spedizione	Franco fabbrica	Spedizione	

Nr.	Descrizione	Quantità	U.d.M.	Prezzo	% sconto	Importo	IVA
80001	Computer III 533 MHz	3	PZ	19,50	0	58,50	E13

Informazioni aggiuntive IVA:
E13 Non sogg. rt. art 13

Scadenza	Importo	Cod. IVA	% IVA	Descrizione	Sc. fatt.	Imponibile	Importo
11/02/2021	58,50	E13		Non soggetto riten. - art. 13		58,50	
Totale		Sconto fattura	Totale imponibile	Totale IVA	Importo netto da pagare	Totale documento	
58,50		0,00	58,50	0,00	58,50 EUR	58,50 EUR	

EOS AG - Sitz/Sede legale: Via G. Di Vittorio Strasse 23, I-39040 Bozen/Südtirol
 EOS AG - Sitz/Sede legale: Via G. Di Vittorio Strasse 23, I-39040 Bozen/Südtirol
 EOS AG - Sitz/Sede legale: Via G. Di Vittorio Strasse 23, I-39040 Bozen/Südtirol
 EOS AG - Sitz/Sede legale: Via G. Di Vittorio Strasse 23, I-39040 Bozen/Südtirol
 EOS AG - Sitz/Sede legale: Via G. Di Vittorio Strasse 23, I-39040 Bozen/Südtirol



User benefits

The benefits for the user are:

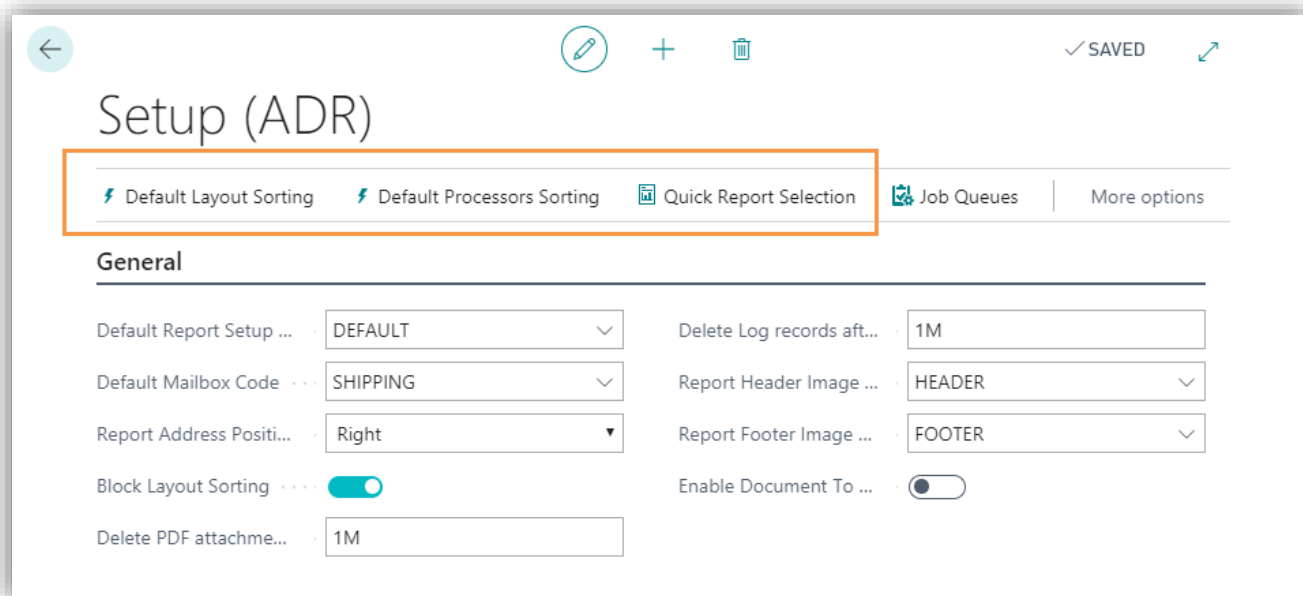
- a single report to print multiple document types
- possibility to print the pdf files and send them by email

Documents and Reports

REPORT NAME	DOCUMENTS
EOS Sales Document	Sales quote
	Sales order
	Blanket sales orders
EOS Invoice Document	Sales Invoice
	Service invoice
	Sales credit memo
	Service credit memo
	Self billing invoice
	Prov. invoice
EOS Shipping Document	Sales shipment
	Purchase return shipment
	Return shipment
	Service shipment
EOS Purchase Document	Purchase order
	Blanket purchase orders
	Purchase quote
EOS Reminder Document	Reminders
	Issued reminders
	Delivery reminders
	Issued deliv. reminders

Setup

Fill in the general setup and quickly set up the reports provided by the Advanced Document Reporting application.



Setup (ADR)

Default Layout Sorting | Default Processors Sorting | Quick Report Selection | Job Queues | More options

General

Default Report Setup ... DEFAULT

Default Mailbox Code ... SHIPPING

Report Address Positi... Right

Block Layout Sorting ... ☒

Delete PDF attachme... 1M

Delete Log records aft... 1M

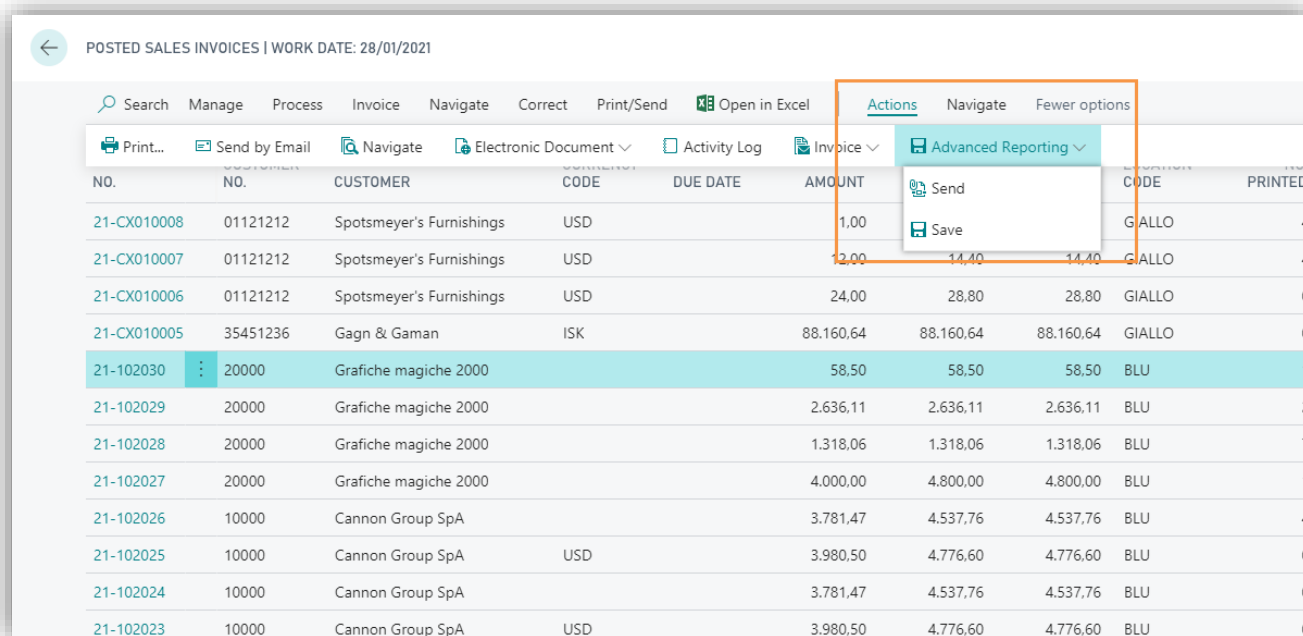
Report Header Image ... HEADER

Report Footer Image ... FOOTER

Enable Document To ... ☐

Send invoices by email

From the Posted Invoice list, for example, select one or more documents and press Actions->Advanced Reporting-> Save / Send.



POSTED SALES INVOICES | WORK DATE: 28/01/2021

Search | Manage | Process | Invoice | Navigate | Correct | Print/Send | Open in Excel | Actions | Navigate | Fewer options

Print... | Send by Email | Navigate | Electronic Document | Activity Log | Invoice | Advanced Reporting

NO.	NO.	CUSTOMER	CODE	DUE DATE	AMOUNT			CODE	PRINTED
21-CX010008	01121212	Spotsmeyer's Furnishings	USD		1,00			GIALLO	4
21-CX010007	01121212	Spotsmeyer's Furnishings	USD		12,00	14,40	14,40	GIALLO	4
21-CX010006	01121212	Spotsmeyer's Furnishings	USD		24,00	28,80	28,80	GIALLO	0
21-CX010005	35451236	Gagn & Gaman	ISK		88.160,64	88.160,64	88.160,64	GIALLO	0
21-102030	20000	Grafiche magiche 2000			58,50	58,50	58,50	BLU	1
21-102029	20000	Grafiche magiche 2000			2.636,11	2.636,11	2.636,11	BLU	2
21-102028	20000	Grafiche magiche 2000			1.318,06	1.318,06	1.318,06	BLU	7
21-102027	20000	Grafiche magiche 2000			4.000,00	4.800,00	4.800,00	BLU	1
21-102026	10000	Cannon Group SpA			3.781,47	4.537,76	4.537,76	BLU	4
21-102025	10000	Cannon Group SpA	USD		3.980,50	4.776,60	4.776,60	BLU	0
21-102024	10000	Cannon Group SpA			3.781,47	4.537,76	4.537,76	BLU	0
21-102023	10000	Cannon Group SpA	USD		3.980,50	4.776,60	4.776,60	BLU	0

Manage
Single Mail
Multi Mail
Send
Files
More options

EDIT - ADVANCED MAIL (ADR) - 9A260B90-EAD0-47D8-9225-AB5F19C013E3

General

Request Type
Single Mail

Report Setup Code
DEFAULT

Mailbox Code
ADMINISTRATION

Language Code

E-Mail Text Code
SALES-DOC

Status
Ready

Last Error

Documents

DESCRIPTION	REPORT SETUP CODE
Sales Invoice Header: 21-102030	DEFAULT

Recipients

ADDRESS TYPE	SOURCE	E-MAIL
From		labs@eos-solu
To		admin@admir

Close

Choose whether to send a single email or an email to multiple recipients.

Emails are added to a queue and it is possible to monitor the outcome of the sending.

Subscription

Some features of the Advanced Document Reporting app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

In detail:

- ✓ **FREE Version:**
the user can print all the reports included and modify the general setup. It is not possible to modify the advanced setups that allow the customization and / or the massive sending.
- ✓ **PRO Version:**
all features are active. The Pro version enable access to report sources, allowing further customization.

