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

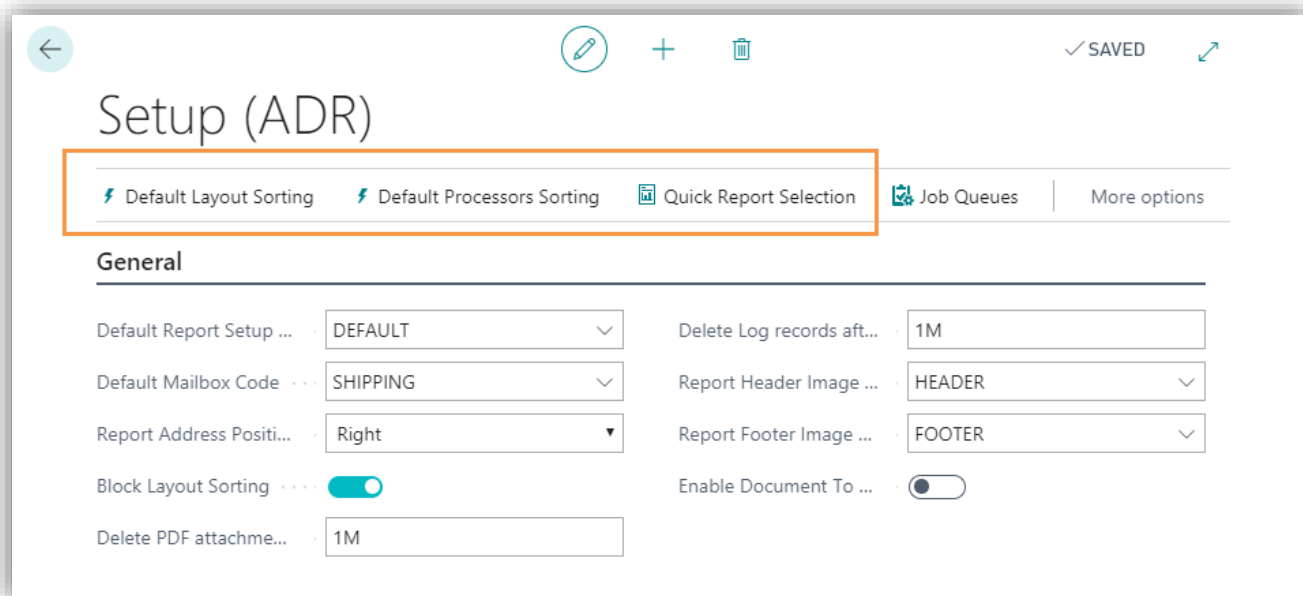# User benefits

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.
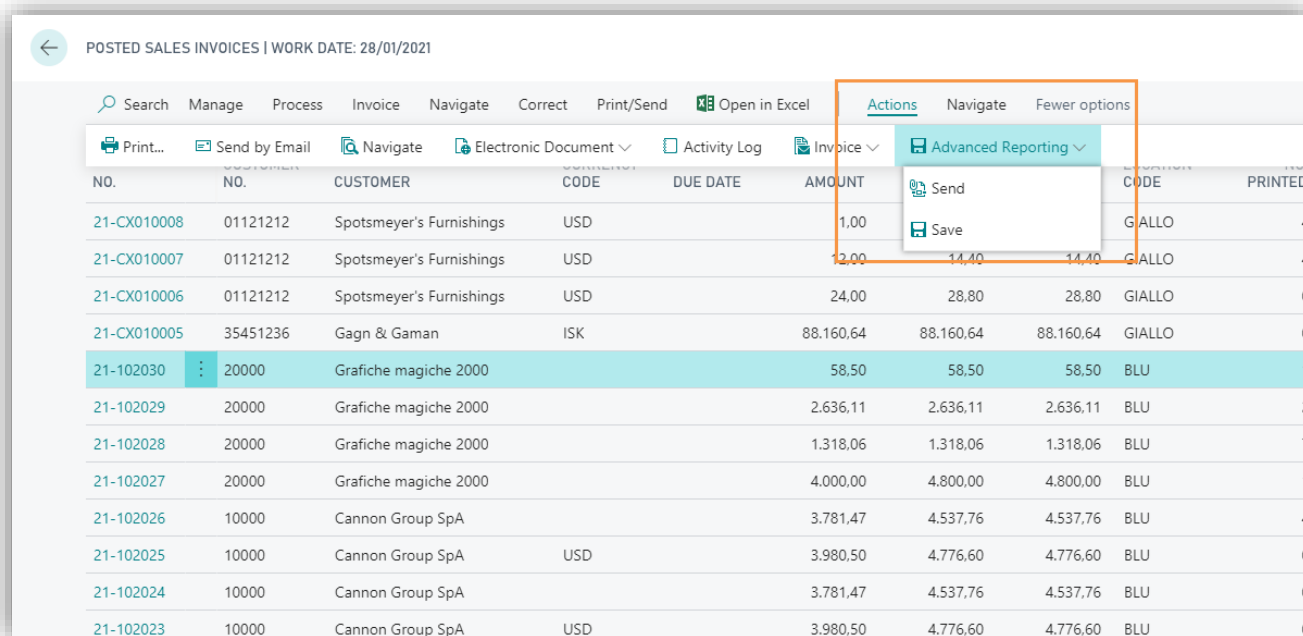
Send invoices by email

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

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.