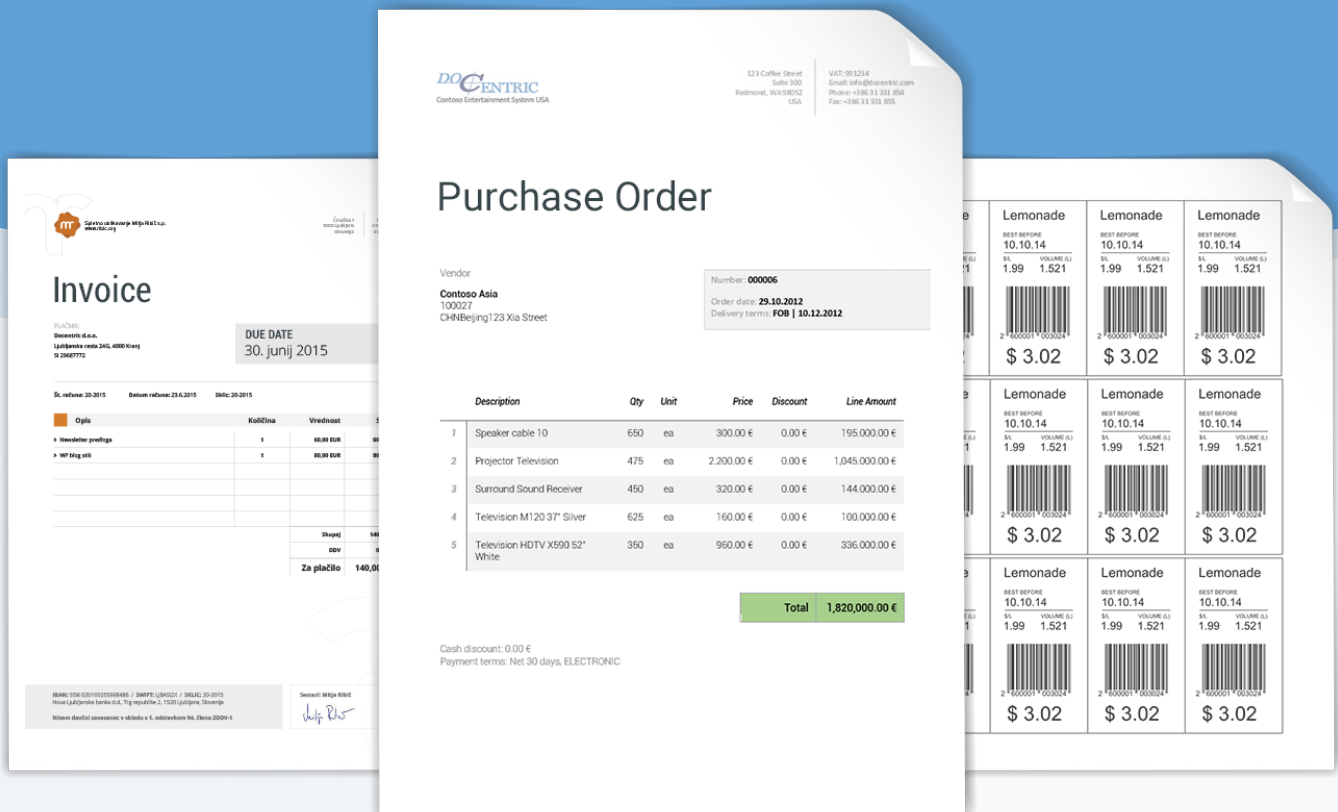


Docentric AX

The Microsoft Dynamics 365 for Finance and Operations Reporting Solution

Improves design, management and print destinations of your reports such as Invoices, Purchase Orders, Contracts, Checks and Barcode Labels.



With Docentric AX you will



Design Reports in MS Word

Empower yourself to design reports using familiar and powerful MS Word.



Enhance Print Destinations

Such as Email, File or Print Archive for each of the reports in your system.



Customize 10 Times Faster

Lower your costs when changing existing reports or creating new custom reports.



Automate All Business Docs

Including barcode labels, contracts, checks, HR documents and product data sheets.

Take control of your business documents

And save your precious time.

Meet Mary. She is a billing analyst working for a mid-size company. Part of her job is to create invoices to bill for the company's services or products. But just after go-live, Mary has noticed that some information she really needs is missing from the printed invoices. This is a typical scenario when an out-of-the-box D365 report needs to be additionally customized.



Mary discovers that the collective invoices don't include all the data she needs.



She needs to contact Perry, a developer working at MS D365 partner.



Mary sends the new design requirements to Perry.



It takes days for Perry to implement all Mary's requirements using the built-in tools.



Perry has to fix the collective invoice design once again.



Unfortunately, Mary determines that the invoice is still not as it needs to be.



Perry finally deploys the new invoice design and it's now on Mary to make a final check.



He needs to wait for some other fixes to be included in the same deployment batch.



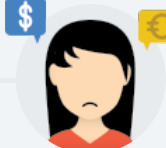
Mary confirms that now everything works just as she requires.



MS D365 partner that Perry works for sends a bill to Mary's company.



Mary can now finally enjoy the new design for collective invoices.



But she has just learned how costly it will be to make any additional report customizations.

With Docentric AX things suddenly become much easier, faster and cheaper for Mary.



Mary discovers that the collective invoices don't include all the data she needs.



She changes the design or introduces an additional design for collective invoices by herself.



Mary can use the changed invoice design immediately.

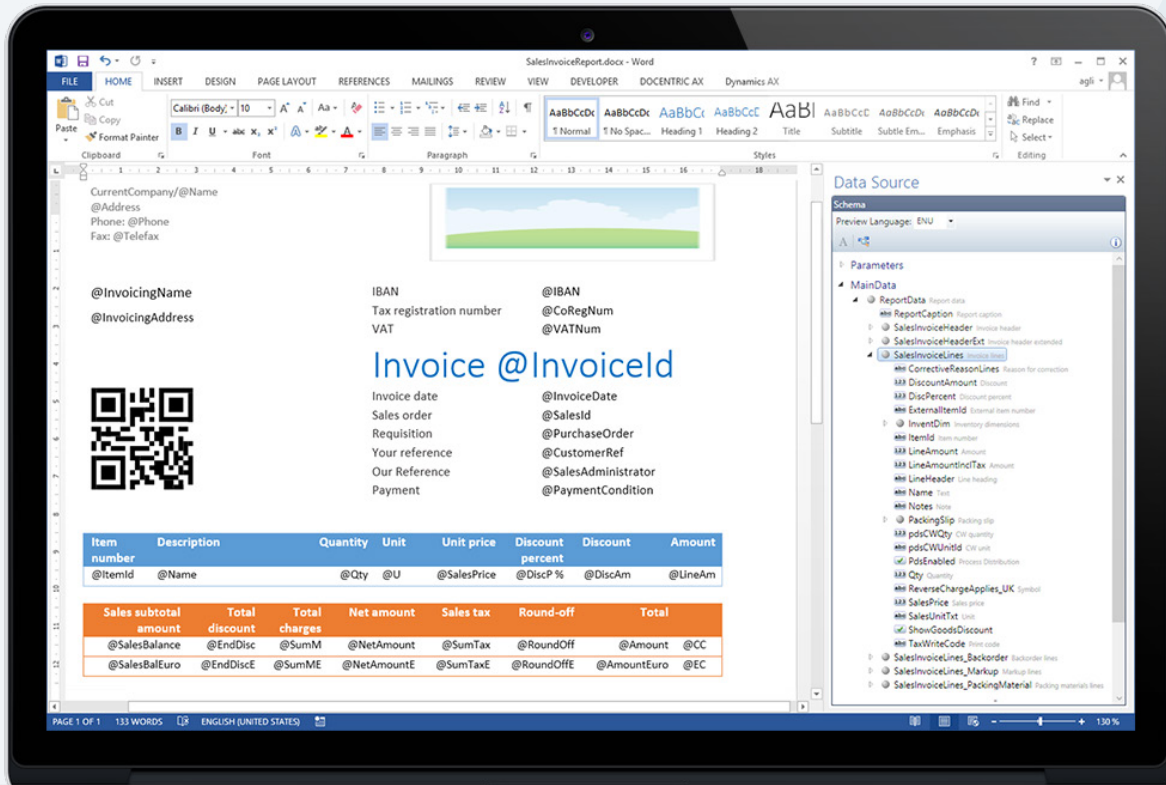


Mary doesn't need to contact Perry anymore or wait for him to change or add a new report design.

With the help of Docentric AX, she can easily do it by herself right from within D365. Now she is also able to design reports directly in MS Word, a tool she already knows. Plus, there are no extra costs for Mary's company either.

Design reports in MS Word

Including forms such as Invoices and Purchase Orders but also Barcode Labels, Contracts, Checks, HR Documents and Product Catalog Sheets.



As a billing analyst, Mary uses MS Word every day. She loves it because it is simple and yet powerful, and most importantly, she knows how to use it. That's why she doesn't really need to invest a lot of effort to learn how to design reports with Docentric AX. With the built-in tool she wouldn't stand a chance.

Reports used with Docentric AX are ordinary Word documents that you will design just like any other documents, using all Word's awesome formatting and layout options that cannot be found anywhere else.



Place Data with Point & Click

Tag a Word document with data-bound placeholders and you'll get a report. Anyone can do it.



Superior Design Features

Use MS Word's constructs such as tables, bullets, images and shapes, and bind them to your data.



Easy Multilingual Reports

Preview reports in multiple languages directly from MS Word and add new translations on-the-fly.



Unified Professional Look

Achieve with no hassle a unified professional look of your business documents companywide.

Improve print destinations for all reports

Use our greatly improved print destination such as Email, File or Print Archive.

The screenshot displays the Dynamics 365 Finance and Operations interface. A 'Purchase order' report is open, showing details for Contoso Entertainment System USA, including address and contact information. The report includes a table of items with columns for 'Delivery date', 'Quantity', 'Unit', 'Unit price', 'Discount', and 'Amount'. A summary table at the bottom shows 'Total charges', 'Net amount', 'Sales tax amount', 'Round-off', and 'Total' (293,725.77 USD). Overlaid on the report are two 'Print destination settings - Docentric' dialog boxes. The left dialog shows settings for 'Email' as the destination, including 'Save in print archive?' (Yes), 'Output filename' (PurchaseOrder_@PurchId@.pdf), 'Output file format' (PDF), and 'Download output file' (Yes). The right dialog shows the 'Email' configuration, including 'To' (@@PurposePO@@:@CustomEmailList@), 'Subject' (@REPORTCAPTION@), 'Attachment name' (Purchase order @PurchId@.pdf), and 'Output file format' (PDF). The email body is being edited with a rich HTML editor, showing a 'Field' dropdown menu with options like 'PO - Purch ID', 'PO - Response Date', and 'PO - Vendor Conta...'. The email body text includes: 'Dear @VendContactName', 'I'm sending you purchase order @PurchId@', 'If possible, could you please @ResponseEndDate@', and 'Nice regards, @WORKER@'.

As a billing analyst, Mary needs to send thousands of invoices every month to the company's clients via email. She needs a nicely designed email body with the invoice date and number, and customer contact name. The email attachment name needs to be meaningful, like Invoice_#No.pdf, and she also needs to attach associated documents like a purchase order or a project document. Mary also needs to check if every invoice is successfully delivered, and if it isn't, to re-send all failed invoices.

Unfortunately, she cannot accomplish any of the above with the built-in tools. **With Docentric AX, she can.**

Docentric AX enables: Email body editing using a rich HTML editor and placeholders, setting up email subjects and output filenames, using multiple email attachments, saving reports in batch to Azure, SharePoint or Attachments, monitoring and re-running reports from fully searchable Print Archive, previewing reports with a much better viewer, and more.

Online, On-Premise and Updates

Docentric AX works in both online and on-premise environments. It is implemented following all Microsoft D365 guidelines and hence, there is never a problem with Microsoft's platform updates.

Excellent Customer Support

We provide exceptional technical support and customer service also because we strongly believe this is an opportunity to learn from you, to improve our products, and simply, grow.



Contact us today

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