

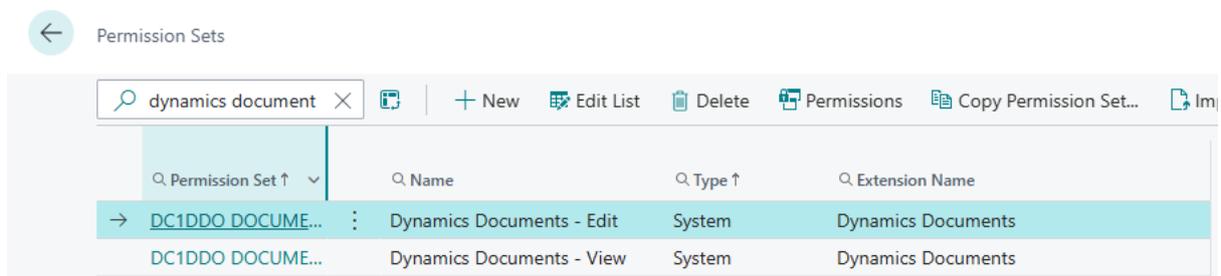
DYNAMICS DOCUMENTS

Dynamics Documents allows users full control over their Business Central documents without the need for bespoke development.

It provides professionally designed layouts for the standard documents and allows users to easily customise headers, footers, fields, formatting and presentation through simple configuration.

1. Setup

Dynamics Documents has two permission sets; Dynamics Documents - View and Dynamics Documents - Edit. The Dynamics Documents - View is also added to the D365 Basic permission set so that it will work for all users with that permission set.



2. Features

Dynamics Documents adds the following features to Business Central:

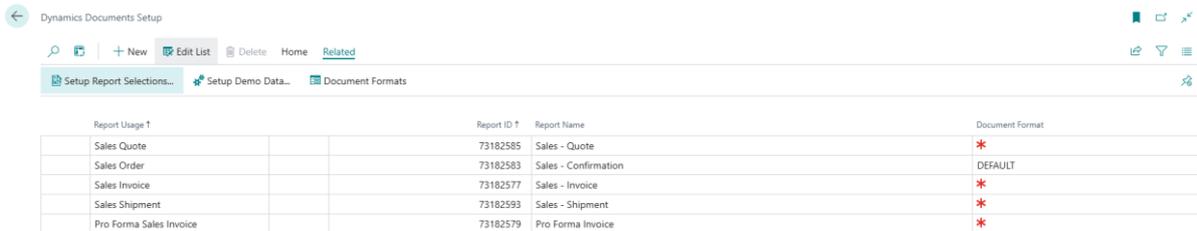
- Create multiple template Document Formats to allow you to make changes to multiple formats at once, making it easy to have a consistent look between your various reports. These changes include:
 - Choose which bank details to include on the documents e.g. IBAN, SWIFT etc.
 - Change the size of the fonts used on the report.
 - Colours and Separators for the lines
 - Justification of the Company Address
 - Which details are shown in the footer
- Configure which fields are shown on the top left and right of the report which include:
 - Fields on the same table
 - Fields from related tables
 - The caption to be shown
 - Date format to be used
- Sections of text to display on the report

3. Setup

To turn on the Dynamics Documents functionality, please go to the Dynamic Feature Management (using the Business Central Search) and check the Enabled checkbox.



From this page, you can also click on the Related Setup action here to open the Dynamics Documents Setup page (can also be opened using the Business Central Search).



This page contains a list of the reports that can be configured using Dynamics Documents. Please note, the screenshot above does not include all the reports configurable.

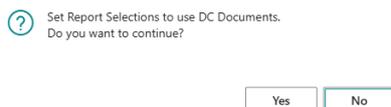
- Report Usage – Specifies the report usage to configure
- Report ID – The id of the report to be configured
- Report Name – Displays the report’s name
- Document Format – Defines which Document Format template should be applied to this report

The following actions can be found on this page:

- Document Header Setup – Configures which fields are shown in the report header
- Document Texts – Defines the texts that are shown at the bottom of the report
- Setup Report Selections – Updates the Report Selections in Business Central to use the Dynamics Documents reports
- Setup Demo Data – Sets up demo data for various aspects of Dynamics Documents
- Document Formats – Opens the list of Document Formats which are templates for the report

3.1. Setup Report Selections

When this action is clicked, the user will be asked to confirm that the Report Selection should be modified to use the Dynamics Documents reports.



This can also be done manually by going to the various standard Report Seletions in Business Central e.g. Sales, Purchase etc. and setting the report to be the report id from the setup page.

Report Selection - Sales ✓ Saved   

Usage Invoice

 Manage  

Sequence ↑	Report ID	Report Name	Use for Email Body	Use for Email Atta...	Email Body Layout	Report Layout
→ 1	73182577	Sales - Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Sales Invoice Email Body	_

3.2. Setup Demo Data

Clicking on the Demo Data Setup opens the following page:

Dynamics Documents Demo Data Setup  

Please choose the demo data to be setup:

Company Information

Responsibility Center

Document Header Setup

Document Texts

From here the user can enable or disable the following options:

- Company Information – When enabled, populates fields in the company information such as VAT Registration, EORI, Statutory Details, Receivables Contact, Country EORI and Email
- Responsibility Center - Specifies if the Responsibility Center details such as Address, EORI and Contact details are to be created.
- Document Header Setup – Will create a Document Header Setup per Report Usage
- Document Texts – Creates example Document Texts for each Report Usage

3.3. Report Layout Quick Reference

Below is a quick reference section for how to modify the appearance of different parts of the report. The font sizes can also be changed in the Font Sizes section of the Document Format.

Invoice: 103305

1 CRONUS International Ltd.
7122 South Ashford Street
Westminster
London, W2 8HG
Great Britain

Bill-to Address: Adatum Corporation, Robert Townes, Station Road, 21, Cambridge, CB1 2FB, Great Britain
Sell-to Address: Adatum Corporation, Robert Townes, Station Road, 21, Cambridge, CB1 2FB, Great Britain

2 Bill-to Customer No. 10000
Receivables Email ReceivablesEmail@d-c.co.uk
VAT Registration No. GB111111111

3 Document Date 05-11-25

Item No.	Description	Cust. Item Ref.	Qty	Unit Price	Disc. %	Amount
ITEM-10001	Item Description of 44 characters with space	ITEM-REF01	5,000	10,000.232	5	47,501,102.00
1385-S	ATHENS Desk		2,000	646.40		1,292,800.00

Subtotal 48,793,902.00
20% VAT 9,758,880.40
Total £ Incl. VAT 58,552,782.40

7 Sort Code 9030000
Account No. 90-99-000
IBAN GB 12 CPBK 08020085044901
SWIFT Code 4978033990261919

8 This is Document Text 1, and can be changed in the related document texts for the record.
This is bold

9 CRONUS UK Ltd., 7122 South Ashford Street, This address 2, London, W2 8HG
Registration No. 621504272 VAT Registration No. 777777777
EORI No. GB0695233555879385
Phone No. 01234 567890 Email ReceivablesEmail@d-c.co.uk

Page 1 of 1

1. Company Address can be left or right justified in the Document Format
2. Fields to be displayed on the left are set in the Document Header Setup
3. Fields to be displayed on the right are set in the Document Header Setup
4. Cust. Item Ref is only shown when one or more of the lines has an item reference for that customer set. The Description column text will fill the area when it's not being used
5. Disc. % is only shown when one or more of the lines has a discount on it
6. The appearance of the lines e.g. colours, lines etc. is configured in the Lines Separator section of the Document Format
7. Which bank details are shown is set in the Bank Details section of the Document Format
8. Texts to be displayed here are set up in the Document Texts. Up to 5 can be created
9. Which details are shown in the footer is configured in the Report Footer section of the Document Format

3.4. Document Formats

The Dynamics Document Formats lists the various templates that can be used on the reports. There can be a separate template for each report or one template can handle multiple reports e.g. a Sales template could be used for all the sales reports.

← Dynamics Documents Format ✎ 📄 + 🗑️ ✓ Saved 📄 ↗️

DEFAULT

↶ Reset Report Format...

General

Code Description

Bank Details >

Font Sizes >

Company Address Formatting >

Lines Separator >

Report Footer >

3.4.1. General

Contains the unique identifier Code for the document format and a Description.

3.4.2. Bank Details

Bank Details

Show Bank IBAN Show Bank Account No.

Show Bank SWIFT Show Sort Code

From here the user can specify which bank details are shown on the report

3.4.3. Font Sizes

Font Sizes

Title Font Size Body Font Size

Header Font Size Footer Font Size

Various different fonts can have their size controlled from this section. Be aware that fonts that are too large will wrap and affect the layout of the report.

3.4.4. Company Address Formatting

Company Address Formatting

Left Justify Company Address

Specifies if the Company Address at the top of the report should be left or right justified.

3.4.5. Lines Separator

Lines Separator

Add Line Separator <input checked="" type="checkbox"/>	Use Alternate Line Colour <input checked="" type="checkbox"/>
Line Separator Colour <input type="text" value="Light Grey"/>	Default Line Background Colour <input type="text" value="White"/>
	Default Line Font Colour <input type="text" value="Black"/>
	Alternative Line Background Colour <input type="text" value="Light Blue"/>
	Alternative Line Font Colour <input type="text" value="Black"/>

This section handles how the lines of the report will appear:

- Add Line Separator – Adds a line in between the separate lines of the document
- Line Separator Colour – Specifies the colour of the line
- Use Alternate Line Colour – Specifies if a different background colour should be used on alternate lines. If not enabled, then all the lines will use the default colours
- Default Line Background/Font Colour – the background/font colour of the lines
- Alternative Line Background/Font Colour – the background/font colour of the alternate lines

3.4.6. Report Footer

Report Footer

Show Registered Company <input checked="" type="checkbox"/>	Show VAT Registration No. <input checked="" type="checkbox"/>
Show Registered Address <input checked="" type="checkbox"/>	Show EORI No. in Footer <input checked="" type="checkbox"/>
Show Registered Address 2... <input checked="" type="checkbox"/>	Show Receivables/Payables... <input checked="" type="checkbox"/>
Show Registration No. in F... <input checked="" type="checkbox"/>	Show Receivables/Payables... <input checked="" type="checkbox"/>

In this section the user can configure what fields are shown in the Report Footer.

3.5. Documents Header Setup

The Dynamics Documents Header Setup is where the users can configure which fields are shown in the left and right of the header. As well as being able to display values from the main record for the report e.g. Sales Header, it can also be set up to display information from related tables such as Shipping Agent for the Shipping Agent Name. It can also be configured to display information from the Sales & Receivables Setup, Purchase and Payables Setup and the Company Information.

Dynamics Documents Header Setup

Usage: Sales Order Report Name: [Redacted]

Report ID: 73182583

Manage Copy Fields Setup... Move Up Move Down

Column	Associate Table	Lookup Field	Use Field Capti...	Report Field Caption	Add colon to capti...	Use Relat... Table	Related Table Caption	No. of Linked Fields	Related Field	Date Format
Left		Due Date	<input checked="" type="checkbox"/>	Due Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>		-		<Closing><Day>.<Month Text><Y...
Left		Comment	<input checked="" type="checkbox"/>	Comment	<input checked="" type="checkbox"/>	<input type="checkbox"/>		-		
Left		Your Reference	<input checked="" type="checkbox"/>	Your Reference	<input checked="" type="checkbox"/>	<input type="checkbox"/>		-		
Right		Shipping Agent Code	<input type="checkbox"/>	Shipping Agent Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shipping Agent	1	Name	
Right		Shipping Agent Service Code	<input type="checkbox"/>	Delivery Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Shipping Agent Services	2	Description	
→ Left			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				...

- Column – Indicates if the field should be shown on the left or the right of the report
- Associate Table – If blank, then the field shown is from the main record for the report e.g. Sales Header, otherwise the field displayed will be from either the Sales & Receivables Setup, Purchases and Payables Setup or the Company Information tables, depending on the value set in this field
- Lookup Field – Specifies the field which value is going to be displayed
- Use Field Caption – If set, then the caption for the field is going to be the default caption for the field.
- Report Field Caption – The actual caption that will be displayed on the report
- Add Colon to Caption – Appends a : to the end of the caption on the report
- Use Related Table – If the field relates to another table then a value from the related table can be displayed instead of the original field. An example of this is the Shipping Agent Code on a Sales Header can be replaced with the Shipping Agent Name from the Shipping Agent record
- Related Table Caption – The caption from the related table
- No. of Linked Fields – Used to link the related table to the main table. See example below

Related Table Link Fields

+ New Edit List Delete

Source Field	Linked Field
→ Shipping Agent Code	Shipping Agent Code
Shipping Agent Service Code	Code

- Related Field – Specifies which field from the related table will be displayed
- Date Format – If the field to be displayed is a date field, then this field is used to determine the format of the date

There are the following actions on this page:

- Copy Fields Setup – With this action, the Documents Header Setup can be copied from an existing setup
- Move Up/Down – Used to adjust the order of the field on the report.

4. Document Texts

Dynamics Documents Texts are used to add additional text to the end of the report. There can be up to 5 texts per report.

← Dynamics Documents Text ✓ Saved  












ReportDetails

Report Usage Sales Order Report Name Sales - Confirmation

Report ID 73182583

Rich Content Text	Text	Comment
→ <input checked="" type="checkbox"/>	<code><div>This should be line 1</div></code>	
<input checked="" type="checkbox"/>	<code><div>This should be line 2</div></code>	
<input checked="" type="checkbox"/>	<code><div>And this is always line 3</div></code>	

This text can be written using rich text content if required.

Dynamics Text Editor  

Rich Content

Enter Text here

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