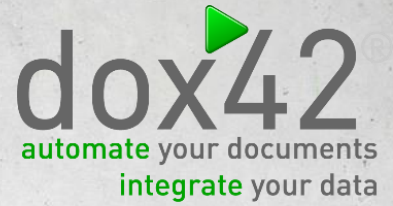


dox42 for Microsoft Dynamics 365 for Operations

Meeting the specific requirements of reports and documents is a major element of every ERP system implementation project. There are often clear requirements a user needs in terms of the design and contents of forms and labels as well as lists and analyses.



CHALLENGES

Adaptations of reports and documents are not simple for the user – this requires expertise in SSRS and often leads to high efforts.

Typical questions which arise during implementation projects:

- ✓ Can I use the design template from Marketing as a basis for my reports?
- ✓ Can I reuse the design from the invoice for the order confirmation?
- ✓ Can I send the order confirmation with an appealing personalized e-Mail?
- ✓ Can I implement the design specifications of my customers for the labels without programming?
- ✓ Can I create a new report, such as a vendor master data list, without programming?
- ✓ Can I create and change reports myself?

SOLUTION

Using the add-on module dox42 for Operations, all of these questions can be answered with a “Yes!”.

- The user can individually and intuitively design new or modify existing reports in Microsoft Word.
- All Word features are available for report design.
- The reports are seamlessly integrated into Microsoft Dynamics 365 for Operations and can be opened in the usual manner.
- The module links Microsoft Dynamics 365 for Operations with the dox42 reporting solution.

BENEFITS

- **Intuitive report design:**
In Microsoft Office instead of in SSRS
- **Diverse application options:**
Forms, labels, reports, etc.
- **Seamless integration:**
No changes required on the part of users; reports are still accessed in the same manner as in Microsoft Dynamics 365 for Operations
- **Time and cost-savings:**
Instead of time-consuming report modifications!



REPORT DESIGN IN WORD

dox42 for Operations allows users to design reports rapidly, intuitively and flexibly in Microsoft Office:

- Based on Word documents and in the appropriate corporate design
- Prepared by the relevant department itself (not by IT), meaning less coordination work
- With drag & drop functions to place data fields in reports
- With the possibility of transferring a finalized layout to other, similar documents
- In the language of the recipient of forms (e.g. offers in the customer language)
- With various designs for specific customers or clients supported

DIVERSE APPLICATIONS

dox42 for Operations is the ideal tool for your documents:

- Document forms, such as invoices or delivery notes
- Labels, also those with bar codes and different printing directions
- Reports with images, data and elements from various data sources

SEAMLESS INTEGRATION

dox42 for Operations supplements the standard reporting options offered by Microsoft Dynamics 365 for Operations:

- Existing Microsoft Dynamics 365 for Operations reports can continue to be used where this makes sense
- New reports can be set up using dox42 for Operations or, as always, with SSRS
- Reports can be accessed in the usual manner directly in Microsoft Dynamics 365 for Operations
- The business logic of Microsoft Dynamics 365 for Operations is fully supported
- The user permissions of Microsoft Dynamics 365 for Operations are fully taken into account
- New reports can be created based on thousands of standard entities and without any programming work
- Integrated options exist for attaching documents to personalized e-Mails

The screenshot shows the Dynamics 365 for Operations interface. The top navigation bar includes 'Dynamics 365', 'Operations', 'Accounts receivable', 'Inquiries and reports', 'Invoices', and 'Invoice journal'. Below this, there are tabs for 'Totals', 'Voucher', 'Transactions', 'Charges', 'Posted sales tax', 'INVOICE', and 'OPTIONS'. The main content area is divided into sections: ACCOUNTING, SHIP, DETAILS, INTERCOMPANY, and DOCUMENT. The DOCUMENT section is expanded, showing options like 'View', 'Copy preview', 'Original preview', and 'Use print management'. Below this, the 'INVOICE JOURNAL' table is visible, listing various invoices with columns for Invoice, Invoice account, Name, Sales order, Date, Voucher, Currency, and Invoice amount.

Invoice	Invoice account	Name	Sales order	Date	Voucher	Currency	Invoice amount
CIV-00000734	US-004	Cave Wholesales	000806	12/14/2016	INV-10000733	USD	18,240.00
CIV-00000735	US-004	Cave Wholesales	000807	12/14/2016	INV-10000734	USD	18,240.00
CIV-00000736	US-004	Cave Wholesales	000809	12/14/2016	INV-10000735	USD	16,340.00
CIV-000008	US-007	Desert Wholesales	000009	1/15/2014	INV-10000007	USD	299,754.90
CIV-000009	US-008	Sparrow Retail	000010	1/15/2014	INV-10000008	USD	263,204.10
CIV-000010	US-009	Owl Wholesales	000011	1/15/2014	INV-10000009	USD	270,130.00
CIV-000011	US-010	Sunset Wholesales	000012	1/15/2014	INV-10000010	USD	242,919.38
CIV-000012	US-011	Contoso Retail Dallas	000013	1/15/2014	INV-10000011	USD	287,646.38
CIV-000013	US-012	Contoso Retail New York	000014	1/15/2014	INV-10000012	USD	286,852.80
CIV-000014	US-013	Pelican Wholesales	000015	1/15/2014	INV-10000013	USD	285,948.00
CIV-000015	US-014	Grebe Wholesales	000016	1/15/2014	INV-10000014	USD	73,114.00
CIV-000016	US-015	Contoso Retail Chicago	000017	1/15/2014	INV-10000015	USD	104,454.37

The screenshot shows a 'contoso SALES INVOICE' document. It includes the following information:

- Customer Information:** Benjamin Bert, Cave Wholesales, 456 White Road, Abbeville, GA 31001, United States.
- Invoice Details:** Invoice number: CIV-00000736, Invoice date: 14/12/2016, Invoice account: US-004, Sales order: 000809, Customer Ref.: 4657-7335.
- Item Table:**

Item	Description	Qty	Unit	Unit Price	Total
D0001	MidRangeSpeaker	11.0	ea	\$ 480.00	\$ 5,280.00
D0002	Cabinet	6.0	ea	\$ 210.00	\$ 1,260.00
D0003	StandardSpeaker	3.0	ea	\$ 220.00	\$ 660.00
D0004	High End Speaker	4.0	ea	\$ 2,000.00	\$ 8,000.00
- Summary:** Net amount: \$15,200.00, VAT 7.5%: \$ 1,140.00, Gross Amount: \$ 16,340.00.
- Payment Terms:** We are kindly ask you to make a payment until Saturday, 01/28/2017.
- Contact:** Karl Bystrom, Phone: 425-555-5055, E-Mail: karl@contoso.com.
- Promotional Offer:** Get off 7% of your next purchase and visit our new shop! Includes a QR code and 'Your Special!' text.
- Footer:** Contoso Entertainment System USA, 123 Coffee Street | Redmond, WA 98052 | United States. Telephone: (800) 22-9999 | Fax: (800) 22-9998. E-Mail: Contoso@contoso.com | Website: www.contoso.com. Bank name: Contoso Bank | Code: 99988777666. Company Reg. No.: 119977-888 | VAT No.: 998765.