

DOX42 FOR D365 FINANCE & SUPPLY CHAIN MANAGEMENT

DOCUMENTATION

Version 2.0.0.2



 **D365 FSCM**

dox42 GmbH | Vegagasse 5/2, A-1190 Vienna
IBAN: AT571420020010936536 | BIC: BAWAATWW | Handelsgericht Wien | FN: 393153 t | UID: ATU67845433

Table of Contents

1	What is dox42 for Finance and Supply Chain Management?	5
2	Installation	6
2.1	Installation of the dox42 Office Add-Ins.....	6
2.2	Installation of the dox42 for Finance & SCM Office Add-Ins.....	6
2.3	Installation of the dox42 Server	9
2.4	Installation of dox42 for Finance & Supply Chain Management for dox42 Server (cloud)	10
2.5	Installation of dox42 for Finance & SCM for dox42 Server (on-premises).....	22
2.6	Installation of dox42 for D365 Finance & SCM for dox42 Online	28
2.7	Installation of dox42 in D365 FSCM.....	37
2.8	Reading data with Service User or AzureAD App (required for multifactor authentication) ..	42
2.9	dox42 for D365 Finance & SCM Setup Connection to D365 FO	44
3	Working with dox42 reports	46
3.1	Basic setup	46
3.2	Create your first dox42 report	51
3.3	Creating Word, Excel and PowerPoint templates.....	68
3.4	Handling changes to the DataProvider and transferring the report to production.....	69
3.5	Create your first Data Entity based (OData) report.....	73
4	Maintain print destinations in D365 FSCM	79
4.1	Configure report destinations	79
4.2	Print management.....	101
5	Traceability – dox42 audit log	113
5.1	Preview serialized report data	116
5.2	Keep it lean and clean	117
5.3	Identifying the right audit log entry.....	118
6	Tips & Tricks	121
6.1	Creating the warning text as a watermark	121
6.2	Use Labels from an Excel document.....	122
6.3	Display the tax groups in a sales invoice	123
6.4	Reuse a layout for a different report.....	125
6.5	Additional table to existing form letter reports	126
7	Advanced dox42 features	127

7.1	Generate report on a specific dox42 server	127
7.2	Archiving of documents	128
7.3	Signing pdf documents	132
7.4	Attach files to dox42 report.....	133
7.5	Save printed report in Document Management	137
7.6	Printing with and without a blank paper	139
7.7	Creating a Barcode.....	140
7.8	Dynamic field.....	140
7.9	Group calculator	142
7.10	Caching printed reports (optional) [BETA].....	143
7.11	Custom report print destinations	144
7.12	Electronic reporting integration.....	149
8	Integration with external apps	164
8.1	What is dox42 integration framework in D365 FSCM?.....	164
8.2	Configuring dox42 integration framework settings	165
8.3	Performing tests of integration	169
8.4	Tracing requests and error handling	170
8.5	D365 F & SCM Security Configuration.....	172
8.6	Integration patterns.....	173
8.7	Developing integration handlers.....	175
8.8	Transfer settings to productive D365 FSCM environment.....	177
9	FAQ	179
9.1	Using different print mediums with a single call	179
9.2	Performance.....	179
9.3	Could not load file or assembly "SolutionsFactory.Dox42"	180
9.4	No records in related data for dox42 reports	181
9.5	Throttling issues.....	182
9.6	Throttling issues with AAD requests	182
9.7	DB synchronization issue upgrading to D365 FSCM X++ 1.2.14, D365 FSCM X++ 1.2.14.1 or 1.4.0 and higher	182
9.8	dox42 server log grows too fast.....	183
9.9	Issues with Document Routing Agent (DRA).....	184
9.10	How to check my dox42 for D365 Finance & SCM.....	184
9.11	Error accessing a table field while generating a report after D365 FSCM update	186
9.12	Error that file type cannot be attached.....	186
9.13	Potentially dangerous values when using HTTP method POST	188
9.14	Invalid dox42 Online certificate after database copy	188

9.15	No dox42 output in print destination settings dialog for custom report.....	190
9.16	Inspection of the word template on dox42 server for hidden/invisible content	190
9.17	Report is printed successfully but not displayed on screen.....	191
9.18	Data entity cannot be selected in dox42 parameters.....	192
10	Version history.....	193
11	Upgrade/Update	196
11.1	Upgrade/Update of the dox42 Office Add-Ins	196
11.2	Upgrade/Update of the dox42 for D365 Finance & SCM Office Add-Ins.....	196
11.3	Upgrade/Update of the dox42 Server.....	196
11.4	Upgrade/Update of dox42 for D365 Finance & SCM for dox42 Server	196
11.5	Upgrade/Update of dox42 in D365 FSCM	196
12	Support.....	198

1 What is dox42 for Finance and Supply Chain Management?

It is a tool which interacts with Microsoft Dynamics 365 Finance and Microsoft Dynamics 365 Supply Chain Management (previously, together, Microsoft Dynamics 365 for Finance and Operations, or "D365 FSCM" for short). dox42 for D365 Finance & SCM can be used for creating special reports, documents or even etiquettes in different languages, this is possible because of the multiple data sources which can be integrate into one document at the same time.

dox42 for D365 Finance & Supply Chain Management is a supplementary package for dox42. dox42 for D365 Finance & Supply Chain Management is a Custom Data Source. It consists of two data sources:

- D365 FSCM Report - Uses data from standard SSRS reports.
- D365 FSCM Entity - Uses data from the OData API.

A dox42 Custom Data Source enables access to specific data sources or systems, additionally to the already predefined data sources.

2 Installation

2.1 Installation of the dox42 Office Add-Ins

The download files for the dox42 Enterprise Add-Ins are available on the dox42 website:

<https://www.dox42.com/Modules/Download>

Install and setup dox42 Word Add-Ins according to the dox42 documentation.

2.2 Installation of the dox42 for Finance & SCM Office Add-Ins

The download files for the dox42 Dynamics 365 for Finance & Supply Chain Management are available on the dox42 website:

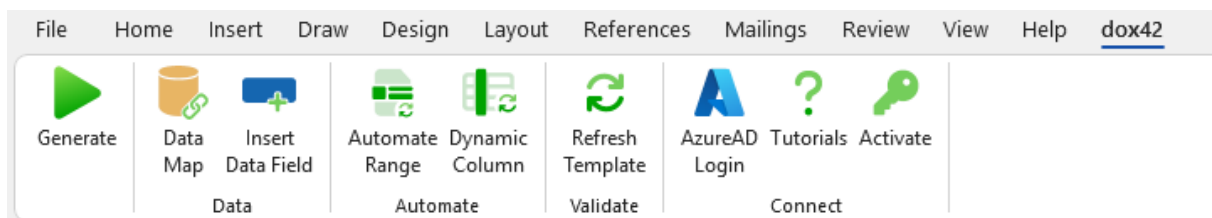
<https://www.dox42.com/Modules/Download>

Save the dox42 for D365 Finance & Supply Chain Management files to a fixed directory on the computer, where you want the dox42 D365 FSCM data source files to be installed.

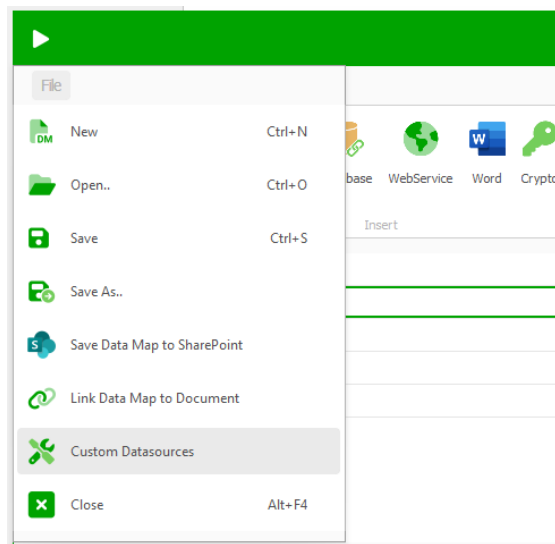
Unzip:

- D365 FSCM Report - **AX7_<Version Number>.zip**.
- D365 FSCM Entity - **AX7_OData_<Version Number>.zip**.

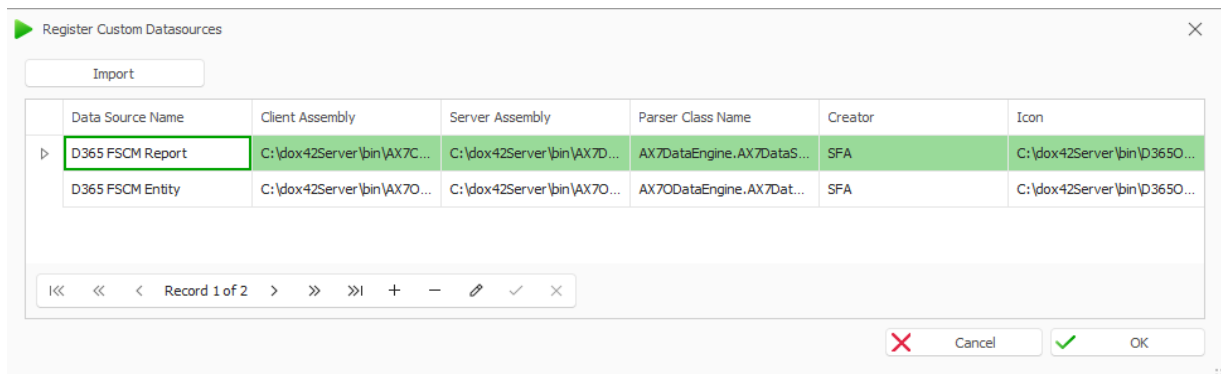
The files will not be copied during installation and need to remain on the selected path, otherwise dox42 won't be able to find the binaries of the new data sources.



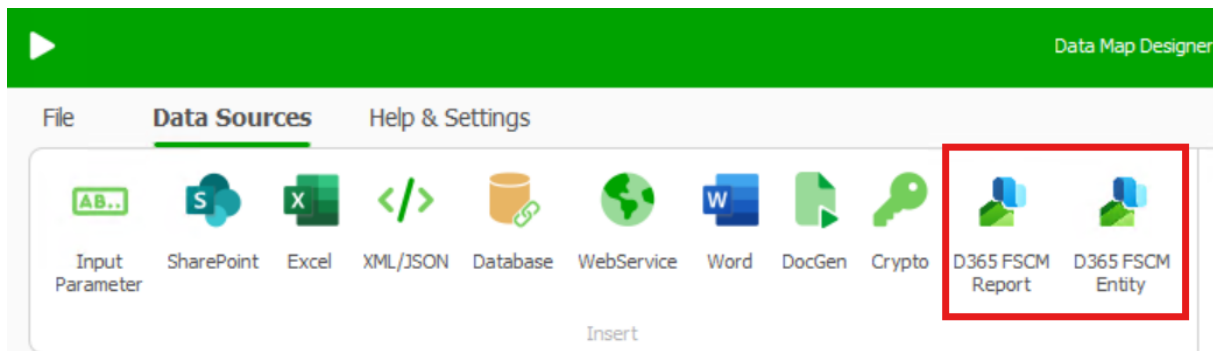
Start Word, activate the dox42-Ribbon and select „Data Map“. In the Data Map Designer select „Data Map“. Open the File-Menu and select „Custom Datasources“.



In the dialog „**Register Custom Datasources**“, import the configurations (**dox42OperationsDataSourceImport.config** for D365 FSCM Report and **AX70DataSourceImport.config** for D365 FSCM Entity). This way, the configurations will be defined in the Custom Data Source.



Now, the Custom Data Sources “D365 FSCM Report” and “D365 FSCM Entity” are ready for use as any other dox42 data source.



Next, the license key should be activated. To do that, simply click on “D365 FSCM Report” (or “D365 FO Report” or “Dynamics 365 for Finance and Operations Data Source” or “Dynamics 365 for Operations Data Source” in previous versions) and go to the tab called “**License**”. Insert the license key here and click “Activate”. After activating the license, the dialog can be closed with cancel or close button.

NOTE: The same key will also work for D365 FSCM Entity ("D365 FO Entity" or the "OData data source" in previous versions).

D365 FSCM Report Data Source

Name:

D365 FSCM Report Connection License

Key:

Bind Key to:

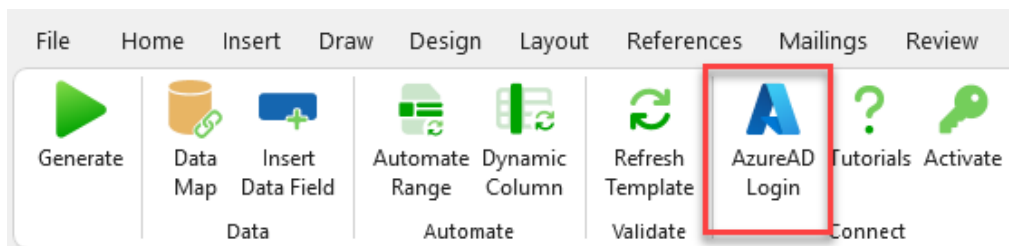
License Info: Licensetype: free

Activate

OK Cancel

To design or generate templates that are stored in SharePoint you need to setup Azure AD Login for SharePoint Online Site:

In the dox42 tab click "Azure AD Login" button:



Then fulfill values as described below:

AzureAD Login for SharePoint Online Site

Share Point URL	Tenant	App ID	Reply URL
https://sharepoint...			https://www.dox42.com

Log In Behavior:

Preferred Azure AD Authentication Library:

Cancel OK

SharePoint Online Site URL: URL to SharePoint Template Site where templates are stored

AzureAD Tenant ID: Tenant ID based on your Azure Active Directory App Registration (find in sections below setup guide)

AzureAD App ID: App ID based on your Azure Active Directory App Registration

AzureAD Desktop Redirect URIs: Desktop Redirect URIs based on your Azure Active Directory App Registration

Log in Behavior: Auto

NOTE: all values can also be taken from "web.config" file on the dox42server (in SharePoint section if it was setup earlier)

2.3 Installation of the dox42 Server

How to install and setup the dox42 Server is documented in the dox42 Server documentation, found on the dox42 Resource page:

<https://www.dox42.com/de/Resources?filter%5b%5d=.dokumentation&search=/server/i&>

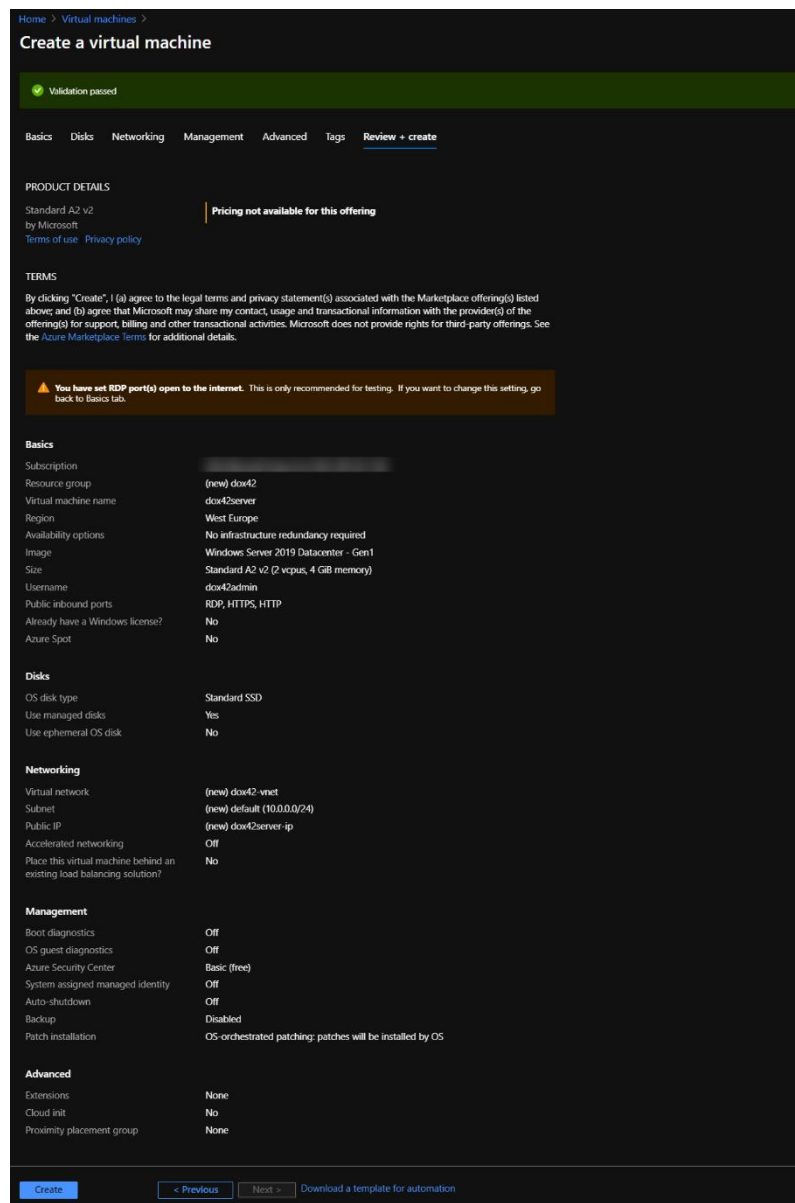
2.4 Installation of dox42 for Finance & Supply Chain Management for dox42 Server (cloud)

Please note: The dox42 Server behaves like any other web-service that is exposed through the internet. Therefore, the same considerations have to be applied against it, like any other web-service. Meaning, you SHOULD use HTTPS for transport encryption, as well as set up authorization rules, for incoming web requests. Configurations depend on your requirements and existing infrastructure. Therefore, the setup for your use-case might differ from the setup we provide below.

It is assumed, that you have already installed the deployable package for your D365 FSCM instance. The provided setup of the dox42 Server, which includes in-transit encryption, as well as template loading from SharePoint sites, has the following steps:

1. Create an Azure Virtual Machine (if it does not already exist) where the dox42 Server will be hosted.

In our case we will select the SKU "A2_v2". If you need more or less compute resource, you may scale the VM accordingly.



Home > Virtual machines >

Create a virtual machine

Validation passed

Basics Disks Networking Management Advanced Tags Review + create

PRODUCT DETAILS

Standard A2 v2
by Microsoft
[Terms of use](#) [Privacy policy](#)

TERMS

By clicking "Create", I (a) agree to the legal terms and privacy statement(s) associated with the Marketplace offering(s) listed above; and (b) agree that Microsoft may share my contact, usage and transactional information with the provider(s) of the offering(s) for support, billing and other transactional activities. Microsoft does not provide rights for third-party offerings. See the [Azure Marketplace Terms](#) for additional details.

Warning: You have set RDP port(s) open to the internet. This is only recommended for testing. If you want to change this setting, go back to Basics tab.

Basics

Subscription	
Resource group	(new) dox42
Virtual machine name	dox42server
Region	West Europe
Availability options	No infrastructure redundancy required
Image	Windows Server 2019 Datacenter - Gen1
Size	Standard A2 v2 (2 vcpus, 4 GB memory)
Username	dox42admin
Public inbound ports	RDP, HTTPS, HTTP
Already have a Windows license?	No
Azure Spot	No

Disks

OS disk type	Standard SSD
Use managed disks	Yes
Use ephemeral OS disk	No

Networking

Virtual network	(new) dox42-vnet
Subnet	(new) default (10.0.0.0/24)
Public IP	(new) dox42server-ip
Accelerated networking	Off
Place this virtual machine behind an existing load balancing solution?	No

Management

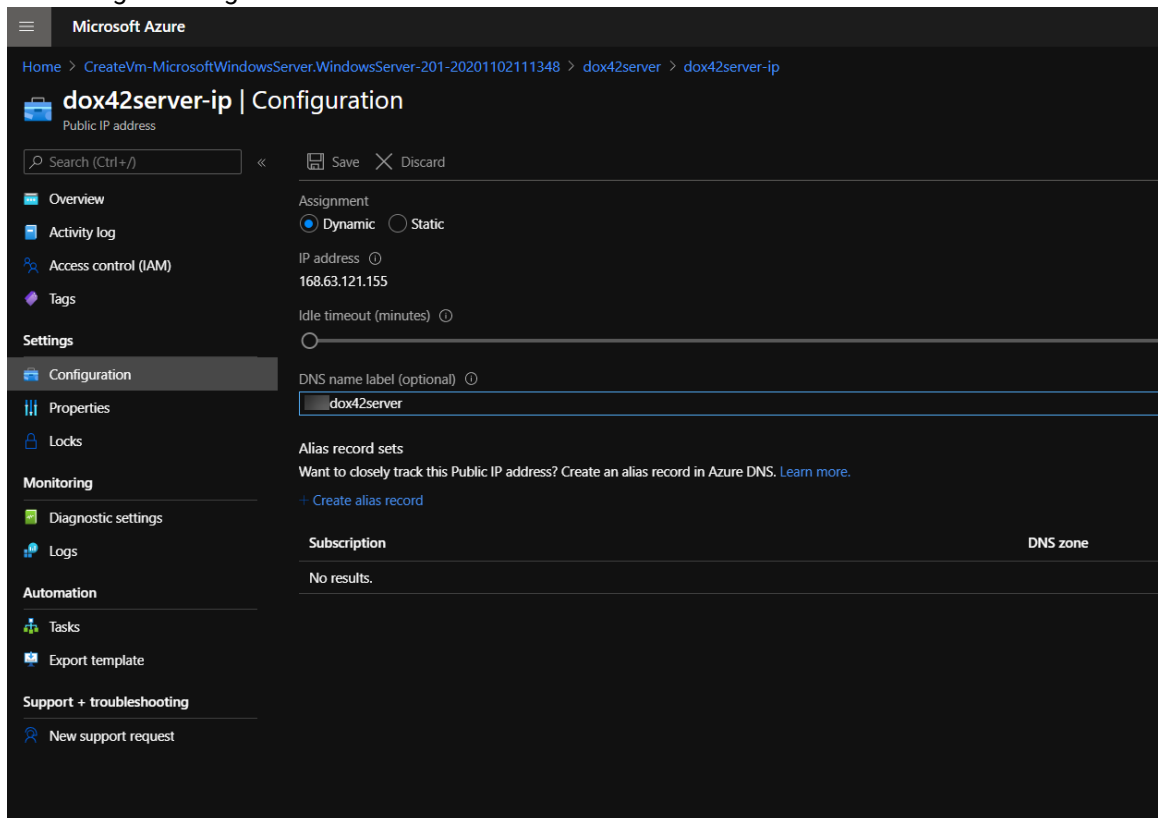
Boot diagnostics	Off
OS guest diagnostics	Off
Azure Security Center	Basic (free)
System assigned managed identity	Off
Auto-shutdown	Off
Backup	Disabled
Patch installation	OS-orchestrated patching: patches will be installed by OS

Advanced

Extensions	None
Cloud init	No
Proximity placement group	None

Create < Previous Next > Download a template for automation

2. Configure a DNS name for the virtual machine in the Public IP resource. This name will be used for generating an SSL certificate.



3. To use the Custom Data Sources for D365 FSCM on the dox42 Server, please copy the following Assemblies in the /Bin directory on the dox42 Server:

AX7DataEngine.dll
AX70DataEngine.dll

The new Custom Data Sources must be registered in the **web.config** of the server.

```
<customDataSources>
<add key="AX7DataEngine.AX7DataSourceParser" value="AX Custom
DS;c:\dox42Server\bin\AX7DataEngine.dll;"/>
<add key="AX70DataEngine.AX7DataSourceParser" value="AX OData Custom
DS;c:\dox42Server\bin\AX70DataEngine.dll;"/>
</customDataSources>
```

Furthermore, please insert the license keys in the **web.config**. You have to insert both values, one for *LicenseKey* (dox42 Server for Documents) and another for *dox42AXLicenseKey* (dox42 for Finance and Operations Server or dox42 for AX Server):

```
<appSettings>
<add key="LicenseFilePath" value="c:\dox42Server\License" />
<add key="LicenseKey" value="..." />
<add key="dox42AXLicenseKey" value="..." />
<add key="MailServer" value="smtp.1und1.de"/>
<add key="dox42ServerMail" value="mydox42server@dox42.com"/>
<add key="MailServerPassWord" value="..." />
<add key="SendErrorsToMail" value="mymonitoring@dox42.com"/>
<add key="Certificate" value="c:\ dox42Server\Certs\Certificate.pfx"/>
<add key="CertificatePassWord" value="..." />
<add key="CheckServiceHeader" value="true"/>
```

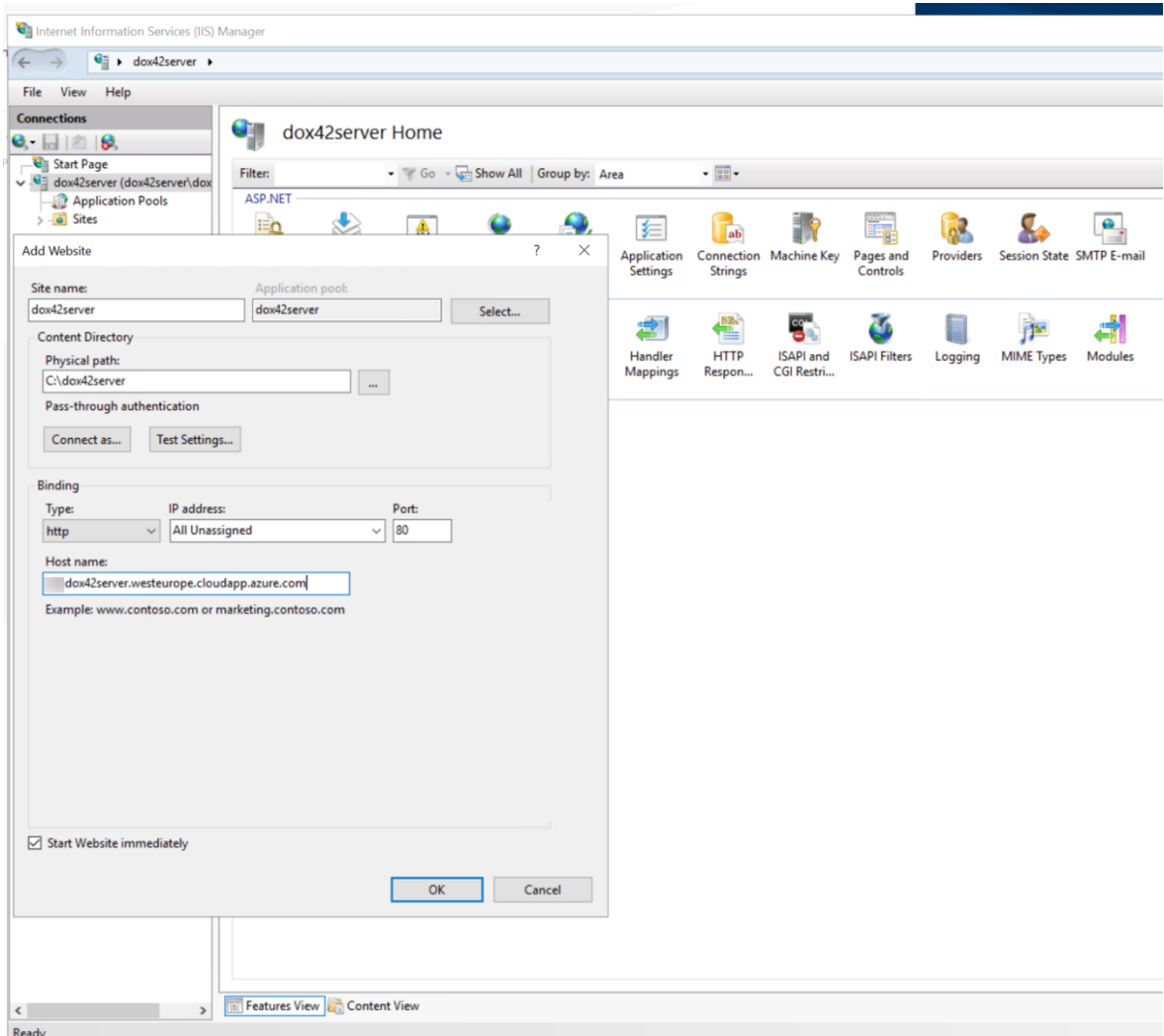
```

<add key="UserPermissionODBCConnectionString"
      value="Driver={SQL Server Native Client 10.0};Server=...;Database=...;Uid=...;Pwd=...;" />
<add key="CheckUserPermissionSQL"
      value="SELECT COUNT(*) FROM Users where Username =
            '%username%' and Password = '%password%'" />
<add key="ThrowExceptionOnError" value="false" />
</appSettings>

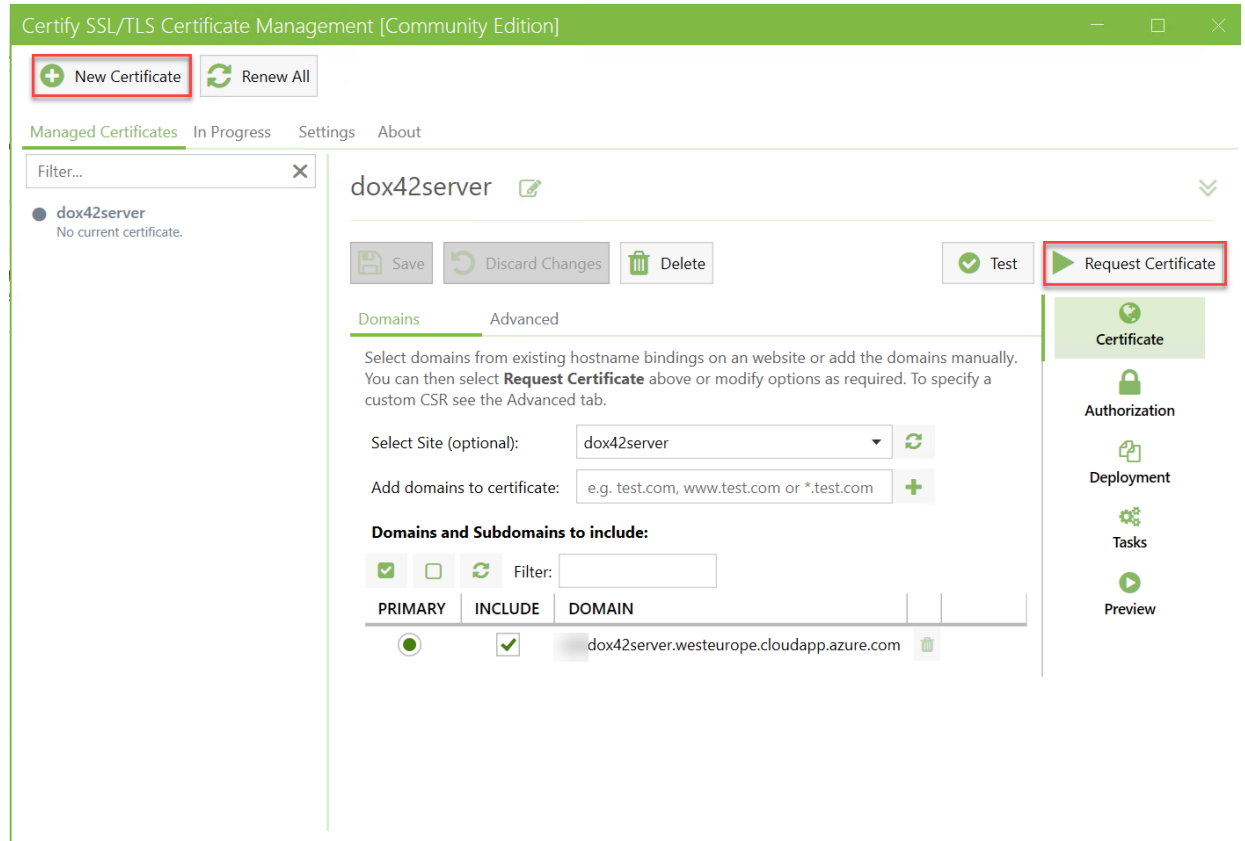
```

4. Create an Azure App registration, which allows access to receive data from D365 FSCM. It does not need any API permissions, however the Client ID has to be registered in the (System administration => Setup => Azure Active Directory applications) settings within D365 FSCM. Generate a secret for the app and take note of it. Both, the client id, as well as the client secret will be used to establish a data connection, when designing templates in Word with dox42.
5. Encrypt traffic using the HTTPS protocol
 In our example, we will acquire a certificate from [Let's Encrypt](#). The subject name of the certificate has to match the endpoint name of the dox42 Server.
 In case of a default Azure Virtual Machine, it is going to be something like ***.northeurope.cloudapp.azure.com**. When the dox42 Server is hosted on-premises, you will have to setup the domain endpoint according to your requirements.
 For receiving the certificate we are using the tool "[Certify the web](#)", which lets you issue certificate request within a nice user interface.

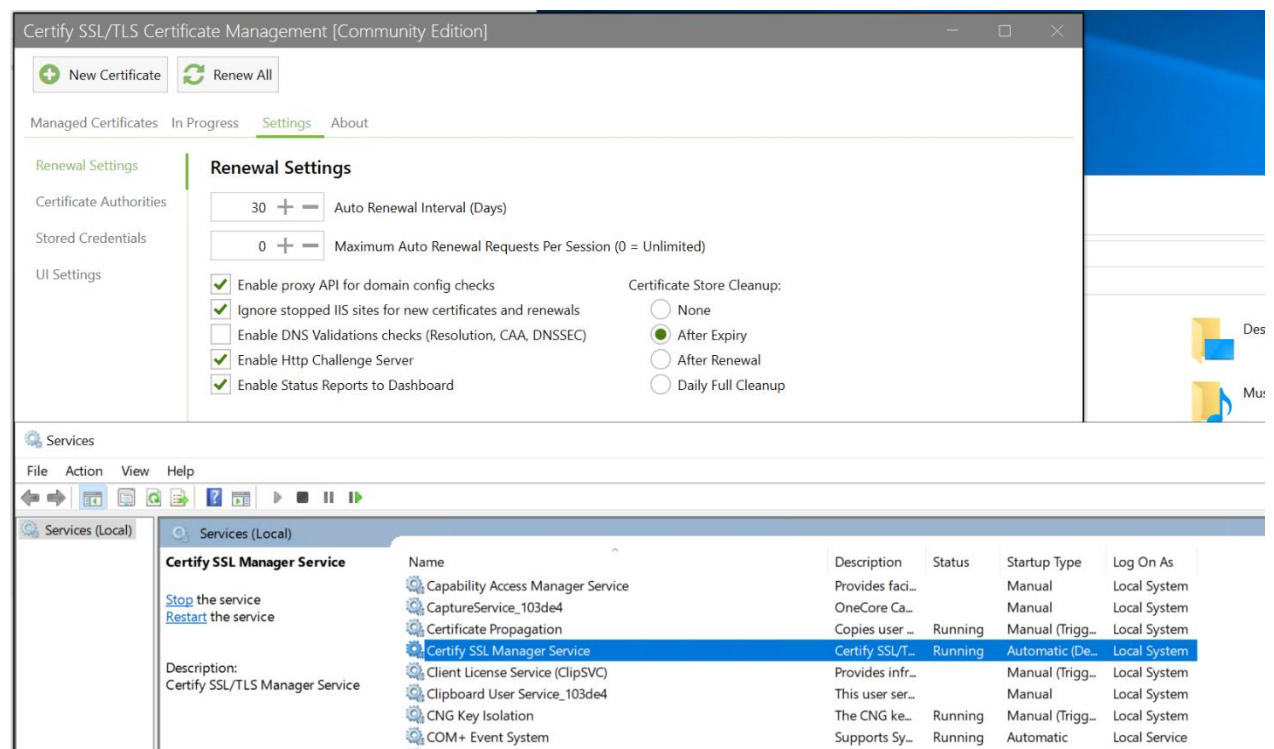
Change the hostname of the website:



When you request a new certificate, using the “Certify the web” tool, it will ask you for an e-mail to be used to notify about certificate expiration. So please enter a valid email to receive those notifications.

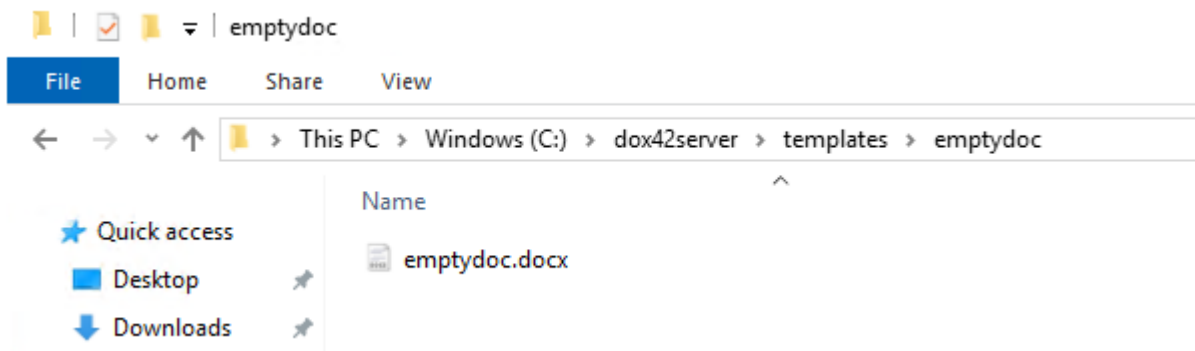


Once certificate is generated, you'll get a new service running in windows services – it will refresh a certificate after its expiration date:

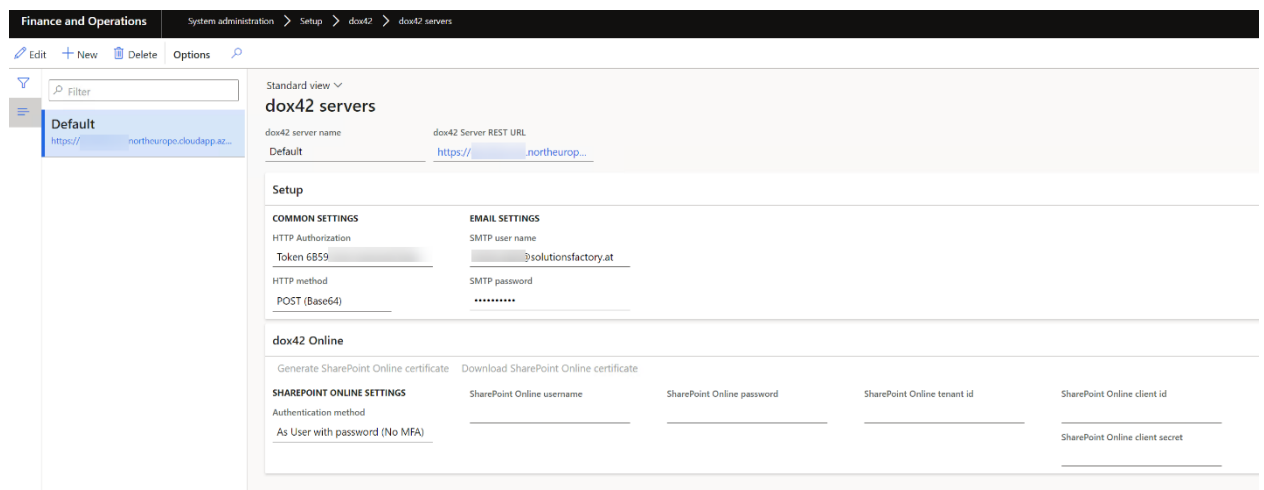


To check if you can reach the server from the test/dev D365 FSCM environment, do the following setup:

1. On dox42server create a new folder with and empty .docx file inside:

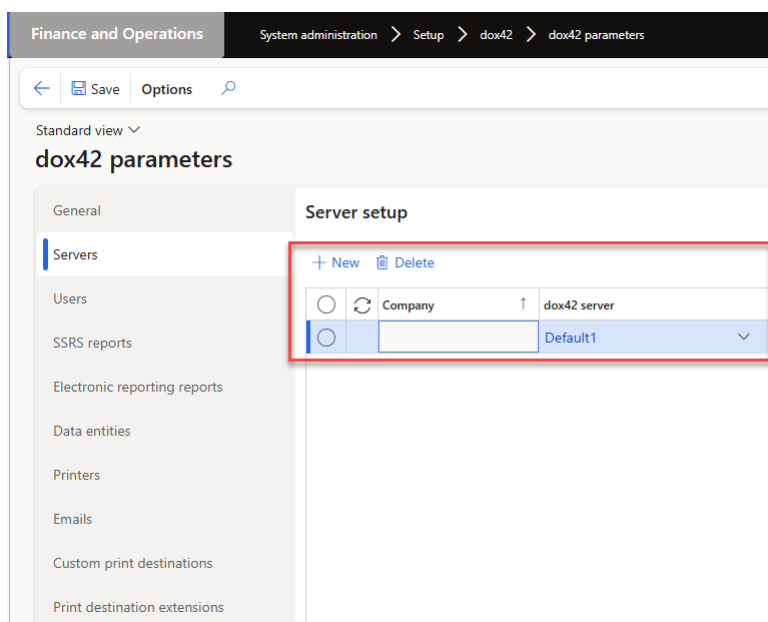


2. On test environment go to dox42 servers form and set up the dox42 server accordingly (it is recommended to use the "POST (Base64)" HTTP method):



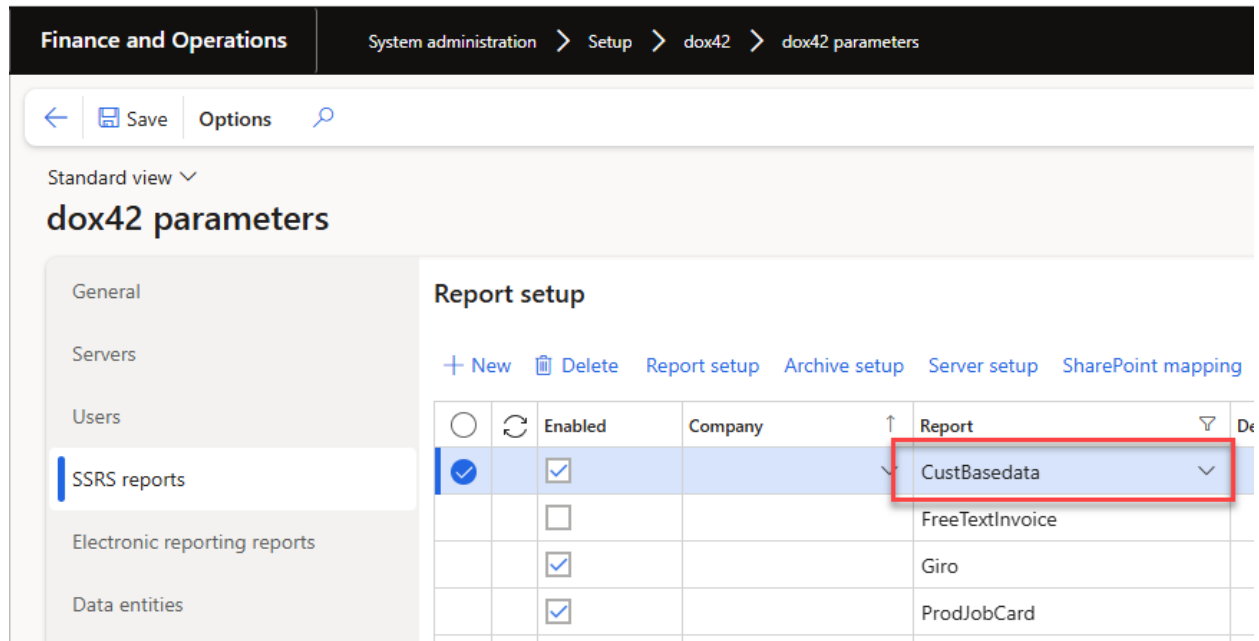
The screenshot shows the 'dox42 servers' configuration form. The breadcrumb trail is: Finance and Operations > System administration > Setup > dox42 > dox42 servers. The form has a left sidebar with a 'Filter' box and a 'Default' view. The main content area is titled 'dox42 servers' and contains several sections: 'Setup' with 'COMMON SETTINGS' (HTTP Authorization: Token 6859, HTTP method: POST (Base64)) and 'EMAIL SETTINGS' (SMTP user name: @solutionsfactory.at, SMTP password: *****). Below this is the 'dox42 Online' section with 'Generate SharePoint Online certificate' and 'Download SharePoint Online certificate' buttons. At the bottom is the 'SHAREPOINT ONLINE SETTINGS' section with fields for Authentication method (As User with password (No MFA)), SharePoint Online username, password, tenant id, client id, and client secret.

3. On test environment go to dox42 parameters form, tab "Servers" and set up the default dox42 server:



The screenshot shows the 'dox42 parameters' form. The breadcrumb trail is: Finance and Operations > System administration > Setup > dox42 > dox42 parameters. The form has a left sidebar with a 'Save' button and a 'Options' button. The main content area is titled 'dox42 parameters' and has a 'Standard view' dropdown. The 'Servers' tab is selected, showing a table with columns for 'Company' and 'dox42 server'. The table has two rows: one with 'Company' and 'dox42 server', and another with 'Default1'. A red box highlights the 'Default1' row.

- On "SRSS reports" tab create a new report setup for (e.g.) the "CustBasedata" report:



Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view ▾

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

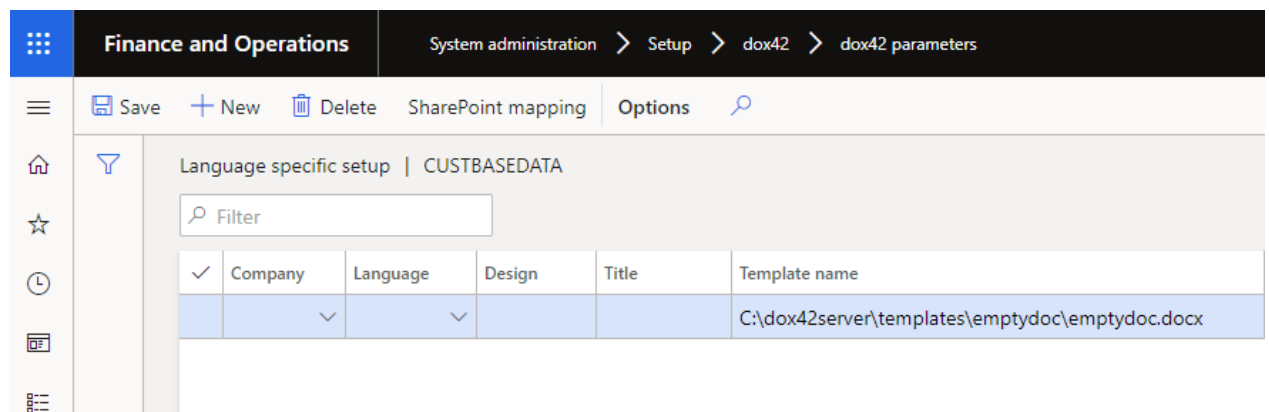
Data entities

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping

<input type="radio"/>	<input type="radio"/>	Enabled	Company	Report
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>			CustBasedata
<input type="radio"/>	<input type="checkbox"/>			FreeTextInvoice
<input type="radio"/>	<input checked="" type="checkbox"/>			Giro
<input type="radio"/>	<input checked="" type="checkbox"/>			ProdJobCard

- On the "Report setup" form specify the path to the template on the dox42server:



Finance and Operations | System administration > Setup > dox42 > dox42 parameters

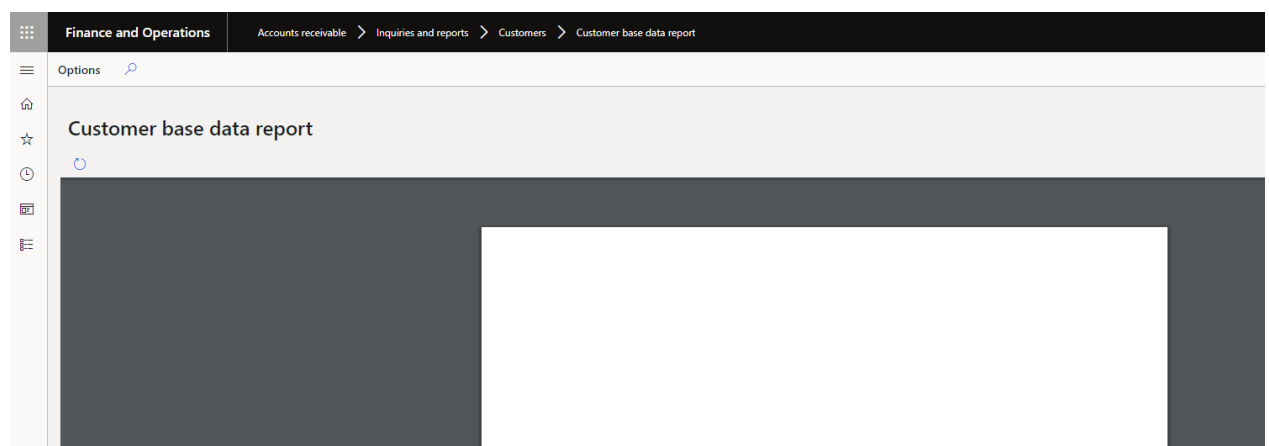
Save + New Delete SharePoint mapping Options

Language specific setup | CUSTBASEDATA

Filter

✓	Company	Language	Design	Title	Template name
					C:\dox42server\templates\emptydoc\emptydoc.docx

- Finally print the report (Accounts receivable => Inquiries and reports => Customers => Customer base data report) to see if the server is reachable and the connection is secure. If you get a blank page, then you can reach the server:



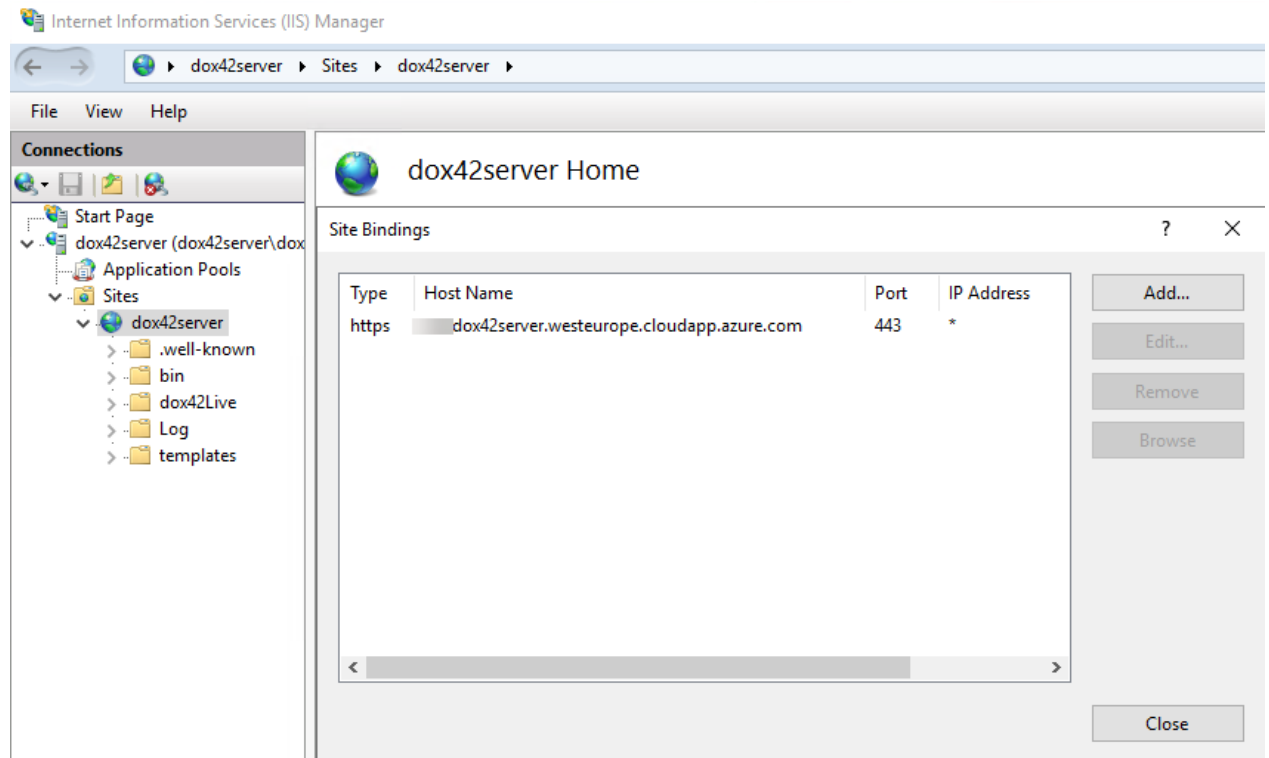
Finance and Operations | Accounts receivable > Inquiries and reports > Customers > Customer base data report

Options

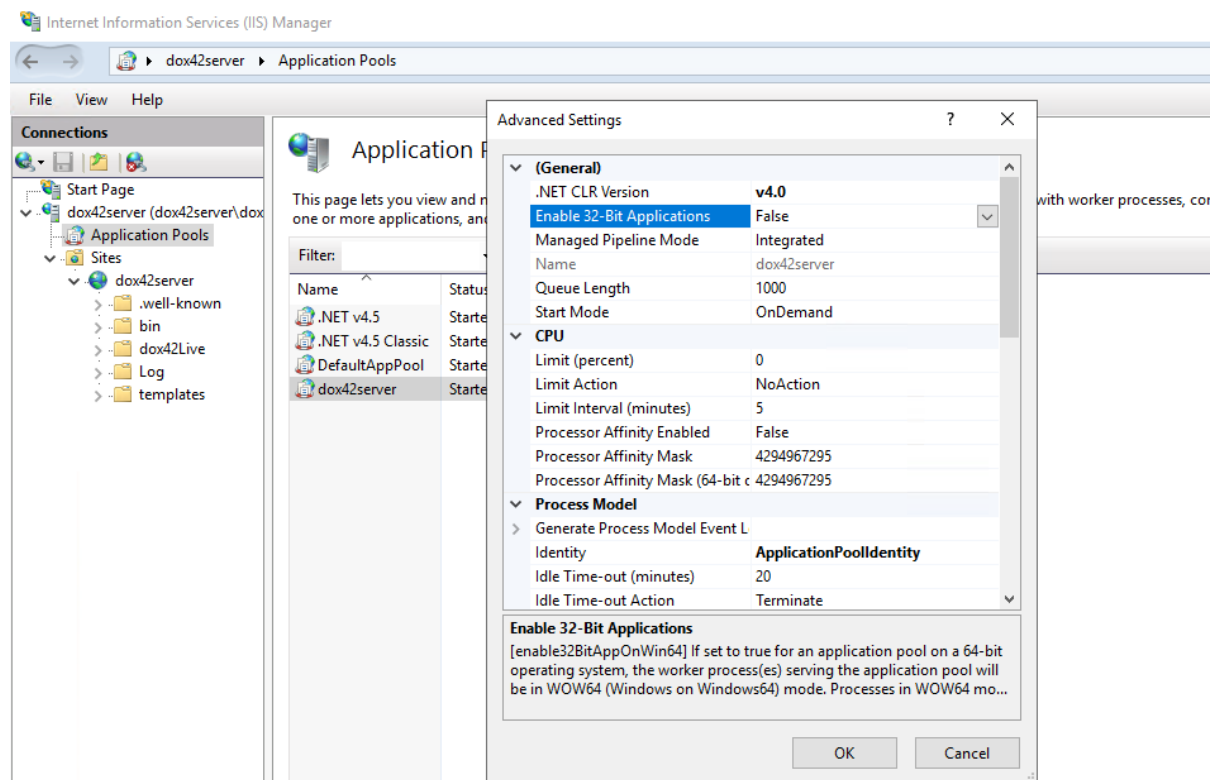
Customer base data report

Blank report area

7. Now you can remove http binding in IIS on the dox42server, leaving only https binding:



8. Finally check if the website is running as 64 bit process:



9. Configure a SharePoint site as a template resource for the dox42Server (for customers who will use SharePoint as a storage for templates).
10. The specific information about AzureAD setup you can find in the chapter [Azure Active Directory App Registration](#)

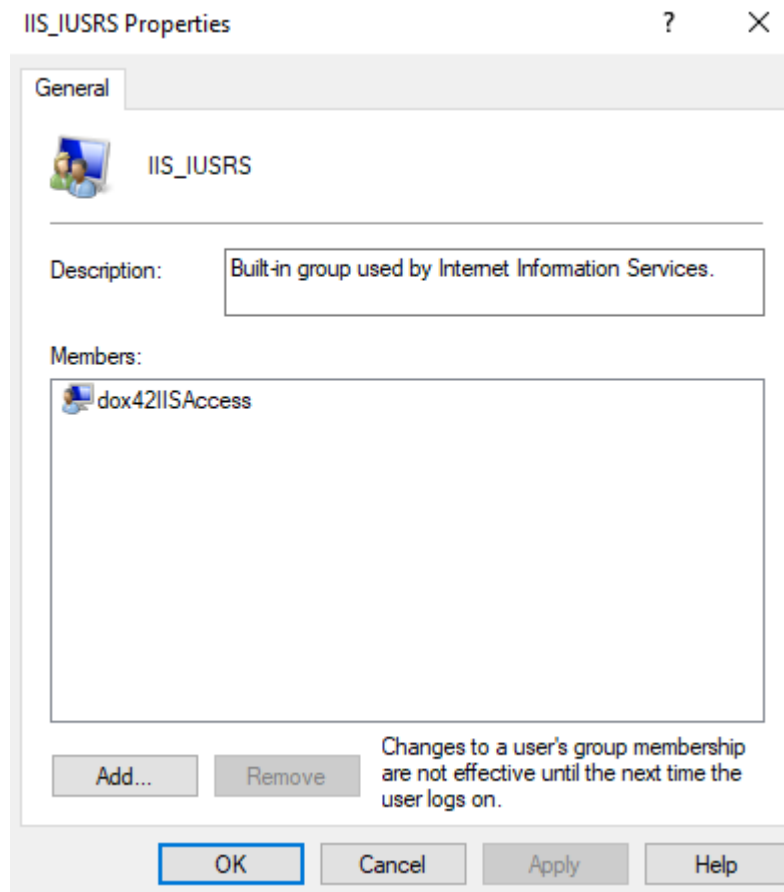
11. The specific information about SharePoint certificate setup you can find in the chapter [SharePoint Online certificate setup](#)

In Server Manager ensure that the next roles and features are installed for IIS:

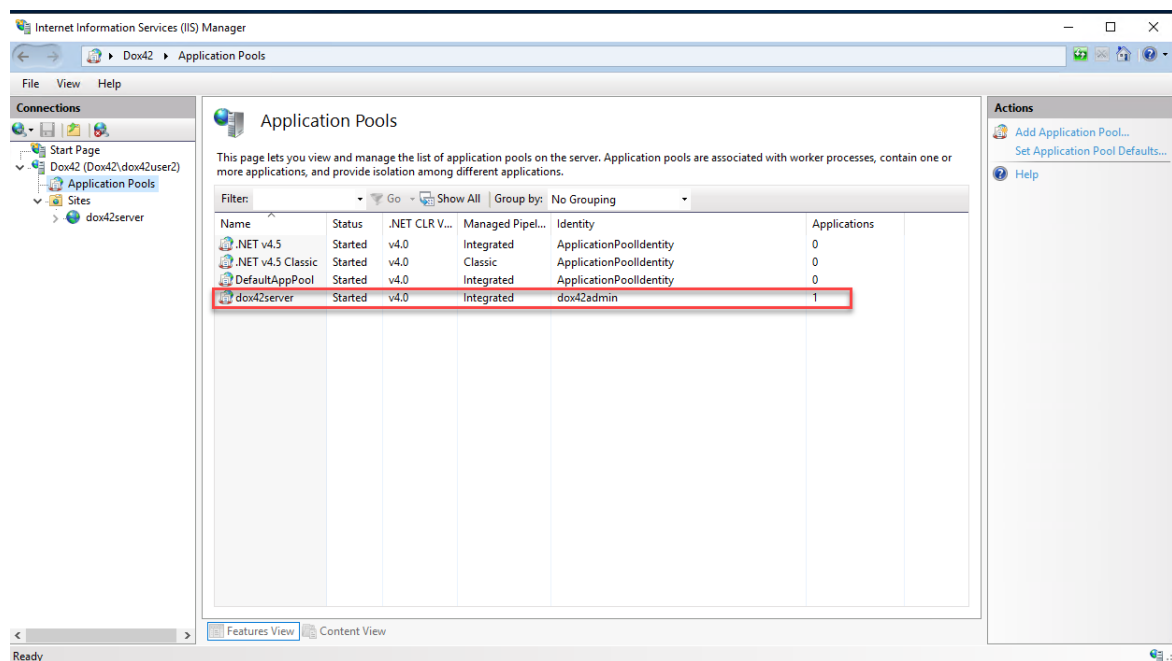
ROLES AND FEATURES			
All roles and features 20 total			
Filter			
Server Name	Name	Type	Path
dox42server	Web Server (IIS)	Role	Web Server (IIS)
dox42server	HTTP Logging	Role Service	Web Server (IIS)\Web Server\Health and Diagnostics\HTTP Logging
dox42server	Health and Diagnostics	Role Service	Web Server (IIS)\Web Server\Health and Diagnostics
dox42server	ISAPI Filters	Role Service	Web Server (IIS)\Web Server\Application Development\ISAPI Filters
dox42server	ISAPI Extensions	Role Service	Web Server (IIS)\Web Server\Application Development\ISAPI Extensions
dox42server	.NET Extensibility 4.7	Role Service	Web Server (IIS)\Web Server\Application Development\.NET Extensibility 4.7
dox42server	ASP.NET 4.7	Role Service	Web Server (IIS)\Web Server\Application Development\ASP.NET 4.7
dox42server	Application Development	Role Service	Web Server (IIS)\Web Server\Application Development
dox42server	HTTP Errors	Role Service	Web Server (IIS)\Web Server\Common HTTP Features\HTTP Errors
dox42server	Directory Browsing	Role Service	Web Server (IIS)\Web Server\Common HTTP Features\Directory Browsing
dox42server	Default Document	Role Service	Web Server (IIS)\Web Server\Common HTTP Features\Default Document
dox42server	Static Content	Role Service	Web Server (IIS)\Web Server\Common HTTP Features\Static Content
dox42server	Common HTTP Features	Role Service	Web Server (IIS)\Web Server\Common HTTP Features
dox42server	Static Content Compression	Role Service	Web Server (IIS)\Web Server\Performance\Static Content Compression
dox42server	Performance	Role Service	Web Server (IIS)\Web Server\Performance
dox42server	Web Server	Role Service	Web Server (IIS)\Web Server
dox42server	IIS Management Console	Role Service	Web Server (IIS)\Management Tools\IIS Management Console
dox42server	Management Tools	Role Service	Web Server (IIS)\Management Tools
dox42server	Security	Role Service	Web Server (IIS)\Web Server\Security
dox42server	Request Filtering	Role Service	Web Server (IIS)\Web Server\Security\Request Filtering

12. For customers who store templates NOT on Sharepoint (who already takes care of authentication) BUT on the dox42server itself, the dox42 server need to be set up in a different way – we need to ensure that only authenticated requests are allowed to generate documents out of templates.

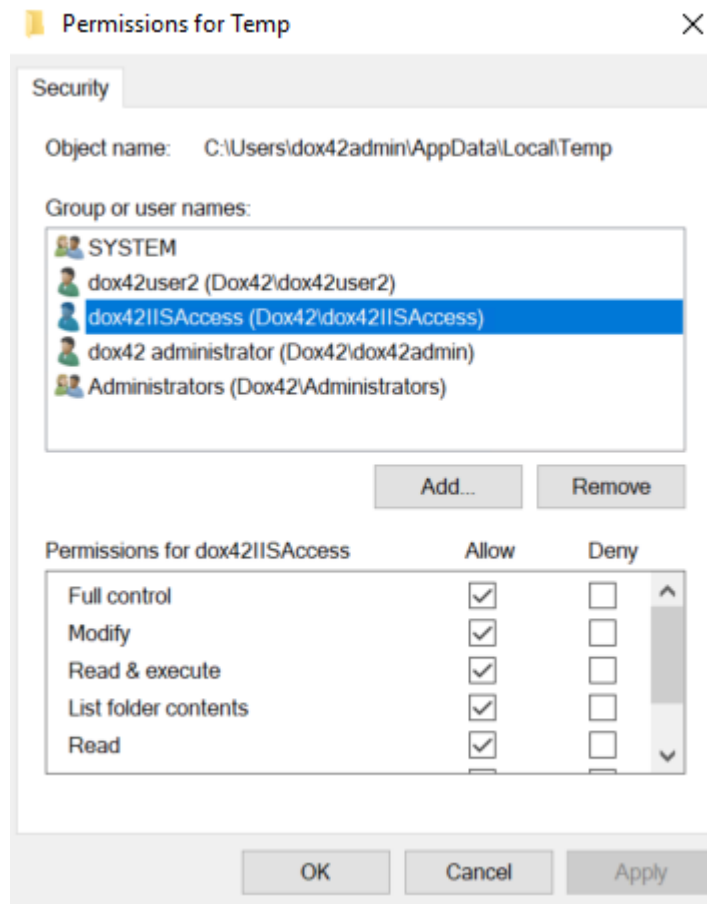
On dox42server, create a user called dox42IISAccess and place him in a group called IIS_IUSRS (create if doesn't exist), remove user from any other groups (if assigned):



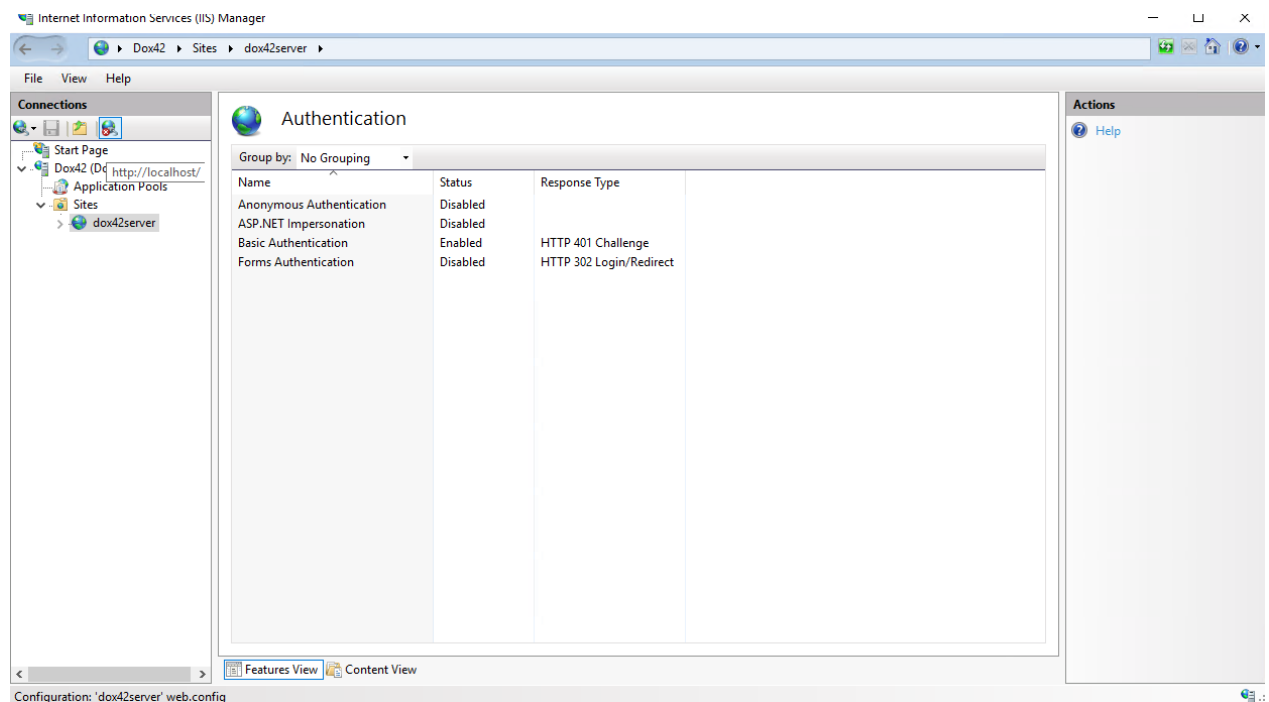
In IIS settings check the identity that dox42server web site is using (dox42admin on the screenshot):



You will need to provide full access to dox42IISAccess user for the Temp folder (path as on the screenshot, if identity is ApplicationPoolIdentity then the path would be C:\Temp):

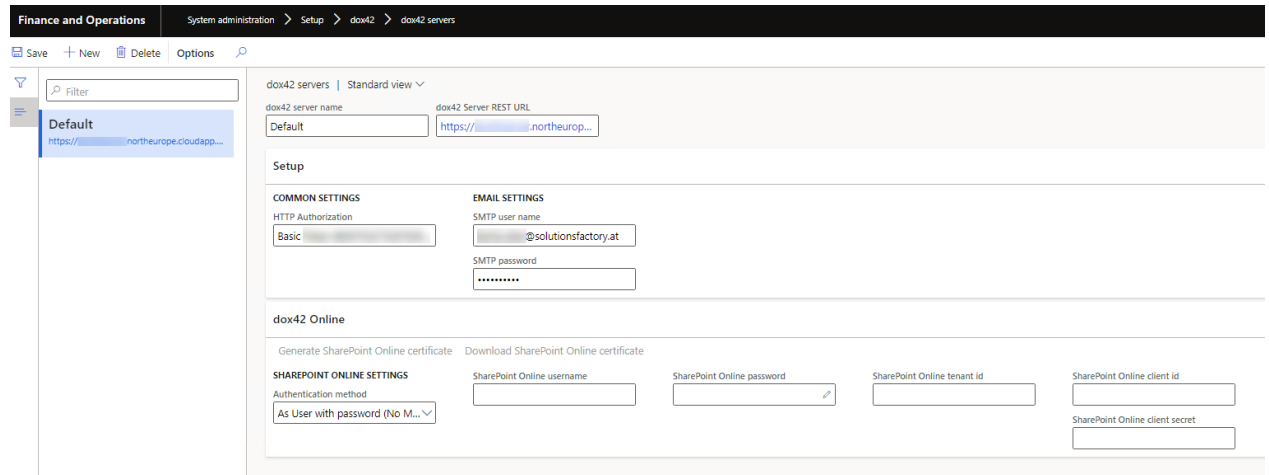


In Authentication settings of the web site, disable anonymous authentication, and enable basic authentication (you might need to install this feature first using Server Manager tool):



Finally encode username and password of the dox42IISAccess user. In order to encode you can use command line for instance with the following syntax: `$ echo -n "username:password" | base64`

Paste the encoded value into HTTP Authorization, field with the preceding "Basic" word on dox42 server page, set other fields accordingly as on the screenshot below (note that encoding is not encryption and credentials can be easily decoded but in pair with https protocol it makes connection secure and encrypted):



Now you can setup a report and try printing it.

In case you get any errors, you can troubleshoot using curl and logs on the dox42 server.

For further details also take a look at the dox42 Server Documentation:

www.dox42.com/dox42Server.aspx.

2.5 Installation of dox42 for Finance & SCM for dox42 Server (on-premises)

In general, on-premises installation of “dox42 for Finance and Supply Chain Management” for dox42 server is similar to its cloud approach, although there are several differences:

1. We need to register an application in Active Directory Federation Services (ADFS - an “onprem” analog of Azure Active Directory) to be able to link a new data source during report template setup to D365 FSCM instance.

In most cases application registration that allows users/apps to interact with Dynamics environments should already exist. In that case you only need to add a new native client application role by logging in to ADFS server and running the following PowerShell command:

```
Add-AdfsNativeClientApplication -Name Dox42 -Identifier "aeff3b71-25b8-4b4b-b7e5-3d13ab83c006" -RedirectUri http://dox42foroperations/ -PassThru
```

Note: you must use the same Identifier value as is provided in command (aeff3b71-25b8-4b4b-b7e5-3d13ab83c006)

Now we want to grant permission to the application, use the following PowerShell command:

```
Grant-AdfsApplicationPermission -ClientRoleIdentifier "aeff3b71-25b8-4b4b-b7e5-3d13ab83c006" -ServerRoleIdentifier "D365_Instance_URL_Here"
```

If an application, that allows interaction with D365 FSCM environment, is not registered in ADFS, the system administrator should create it first, in case you have to create it:

1. In ADFS expand Application Groups folder and open existing group. There you have to create a new Native Application with the properties as on the screenshot:

Microsoft Dynamics 365 for Operations On-premises - Dox42Service

General

Name:
Microsoft Dynamics 365 for Operations On-premises - Dox42Service

Client Id:
aeff3b71-25b8-4b4b-b7e5-3d13ab83c006

Redirect URI:
http://dox42foroperations/

Description:

OK Cancel Apply

2. Click “OK” - a new application is added:

Microsoft Dynamics 365 for Operations On-premises Properties

General

Name:
Microsoft Dynamics 365 for Operations On-premises

Description:

Applications:

Name	Description
Native application	
Microsoft Dynamics 365 for Operations On-premises - Dox42Service	
Microsoft Dynamics 365 for Operations On-premises - Native applica...	
Microsoft Dynamics 365 for Operations On-premises - Workflow - Na...	
Microsoft Dynamics 365 for Operations On-premises - Financial Rep...	
Web API	
Microsoft Dynamics 365 for Operations On-premises - Web application	
Microsoft Dynamics 365 for Operations On-premises - Web API	
Microsoft Dynamics 365 for Operations On-premises - Financial Rep...	

Add application... Edit... Remove

OK Cancel Apply

- Grant permission by running the following PowerShell script (as admin):

```
Grant-AdfsApplicationPermission -ClientRoleIdentifier "aeff3b71-25b8-4b4b-b7e5-3d13ab83c006" -ServerRoleIdentifier "Error! Hyperlink reference not valid."
```

- Now you have to properly set properties for the Web API app:

Double click Web API app from the existing applications list in ADFS group

Microsoft Dynamics 365 for Operations On-premises Properties

General

Name:
Microsoft Dynamics 365 for Operations On-premises

Description:

Applications:

Name	Description
Native application	
Microsoft Dynamics 365 for Operations On-premises - Dox42Service	
Microsoft Dynamics 365 for Operations On-premises - Native applica...	
Microsoft Dynamics 365 for Operations On-premises - Workflow - Na...	
Microsoft Dynamics 365 for Operations On-premises - Financial Rep...	
Web API	
Microsoft Dynamics 365 for Operations On-premises - Web application	
Microsoft Dynamics 365 for Operations On-premises - Web API	
Microsoft Dynamics 365 for Operations On-premises - Financial Rep...	

Add application... Edit... Remove

OK Cancel Apply

On the "Access control policy" tab choose "Permit everyone" policy:

Microsoft Dynamics 365 for Operations On-premises - Web API Properties

Identifiers Notes Access control policy Issuance Transform Rules Client Permissions

Choose an access control policy:

Name	Description
Permit everyone	Grant access to everyone.
Permit everyone and require MFA	Grant access to everyone and requir...
Permit everyone and require MFA for specific g...	Grant access to everyone and requir...
Permit everyone and require MFA from extranet...	Grant access to the intranet users an...
Permit everyone and require MFA from unauth...	Grant access to everyone and requir...
Permit everyone and require MFA, allow autom...	Grant access to everyone and requir...
Permit everyone for intranet access	Grant access to the intranet users.
Permit specific group	Grant access to users of one or more...

Policy

Permit everyone

OK Cancel Apply

On the “Client permissions” tab check the same permitted scopes as are set for the Workflow app:

The screenshot shows the 'Client Permissions' tab of the 'Microsoft Dynamics 365 for Operations On-premises - Web API Properties' dialog. The 'Client application (caller):' list contains three entries, with 'Microsoft Dynamics 365 for Operations On-premises - Dox42S...' selected. Below this are 'Add...' and 'Remove' buttons. The 'Permitted scopes:' section contains a table with the following data:

Scope Name	Description
<input checked="" type="checkbox"/> allatclaims	Requests the access token claims in the identity token.
<input checked="" type="checkbox"/> aza	Scope allows broker client to request primary refresh token.
<input checked="" type="checkbox"/> email	Request the email claim for the signed in user.
<input type="checkbox"/> logon_cert	The logon_cert scope allows an application to request logo...
<input checked="" type="checkbox"/> openid	Request use of the OpenID Connect authorization protocol.
<input type="checkbox"/> profile	Request profile related claims for the signed in user.
<input checked="" type="checkbox"/> user_imperso...	Request permission for the application to access the resour...

At the bottom of the 'Permitted scopes:' section is a 'New scope...' button. The main dialog has 'OK', 'Cancel', and 'Apply' buttons at the bottom.

Microsoft Dynamics 365 for Operations On-premises - Web API Properties

Identifiers Notes Access control policy Issuance Transform Rules Client Permissions

Configure application permissions to enable client applications to access this Web API

Client application (caller):

Name	Description
Microsoft Dynamics 365 for Operations On-premises - Workflo...	
Microsoft Dynamics 365 for Operations On-premises - Dox42S...	
Microsoft Dynamics 365 for Operations On-premises - Native a...	

Add... Remove

Permitted scopes:

Scope Name	Description
<input checked="" type="checkbox"/> email	Request the email claim for the signed in user.
<input type="checkbox"/> logon_cert	The logon_cert scope allows an application to request logo...
<input checked="" type="checkbox"/> openid	Request use of the OpenID Connect authorization protocol.
<input type="checkbox"/> profile	Request profile related claims for the signed in user.
<input checked="" type="checkbox"/> user_imperso...	Request permission for the application to access the resour...
<input type="checkbox"/> vpn_cert	The vpn_cert scope allows an application to request VPN ...
<input type="checkbox"/> winhello_cert	The winhello_cert scope allows an application to request ...

New scope...

OK Cancel Apply

5. Click "OK" to apply and save changes.

Once the app is created and set up and PowerShell commands were successfully executed, we can connect data source. On connection tab select "On-premise installer" checkbox:

D365 FSCM Report Data Source

Name: ERReportData

D365 FSCM Report Connection License

D365 FSCM URL: ...

User credentials

Username/Client id: ...

Password/Secret: ... Show ...

☒ On-premise installer

Connect

OK Cancel

Connected to: https://fiopevfp212a44a5e04d6200b5devaos.cloudax.dynamics.com

Now populate field values taking into consideration the following descriptions:

D365 FSCM URL – URL of the target Dynamics environment

Username/Client id – e-mail address of the user that has access and is enabled in D365 FSCM instance that we are connecting to

Password/Secret - password of that valid user

Authority – ADFS server URL (normally is <https://hostname/adfs/> can be taken from user settings page in D365 FSCM: System administration => Users => any valid user settings)

2.6 Installation of dox42 for D365 Finance & SCM for dox42 Online

Using dox42 with AAD and/or with **dox42 Online** (Saas), requires the following properties:

- **Application ID / Client ID** > is provided after the app registration in the Microsoft Admin Center
- **Redirect URL**
- **Tenant ID**
- **Client Secret for dox42 Online**

For the AAD integration, you have to configure a few settings in the Microsoft **admin center** and in dox42 Online.

Please note: for some of the following steps you need (global-) Admin rights:

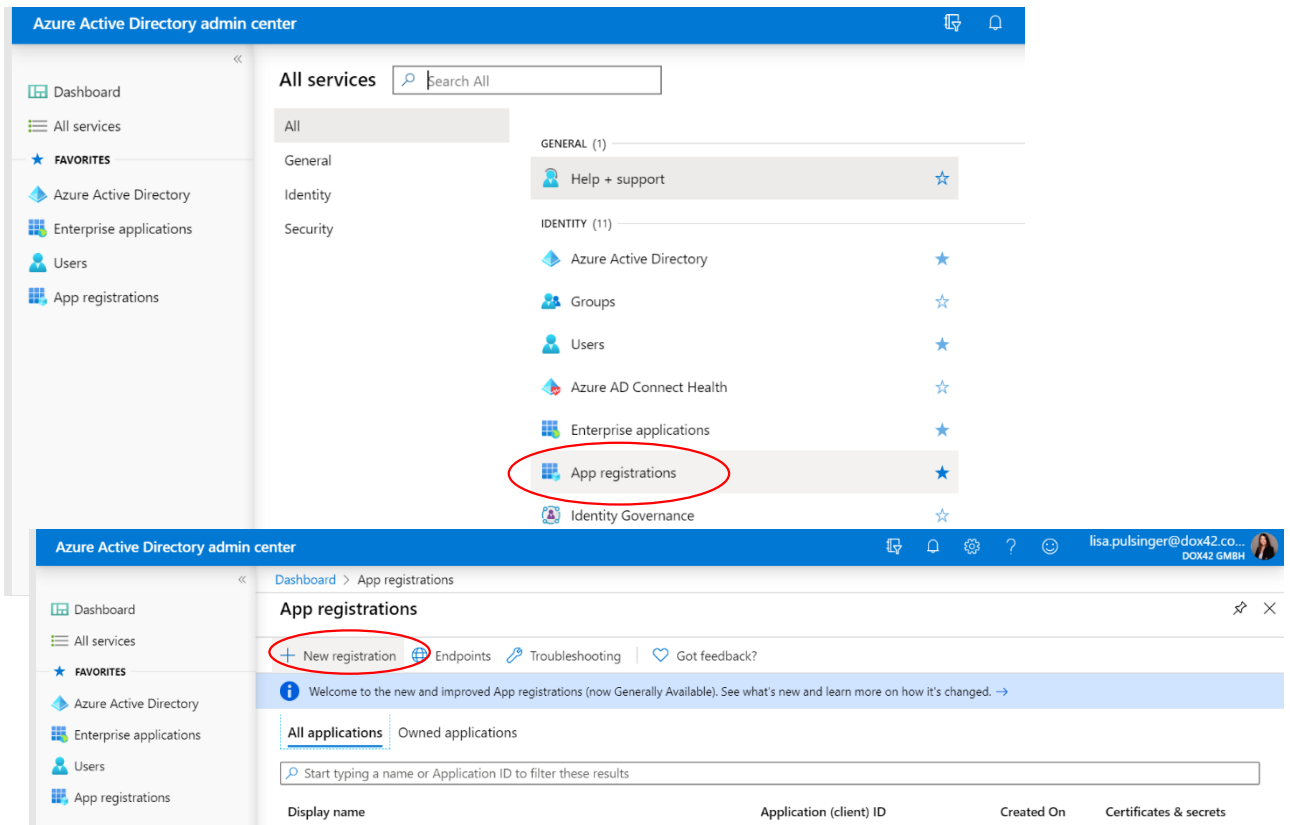
- App Registration
- Enabling required permissions
- Entering Redirect URL(s)

2.6.1 Azure Active Directory App Registration

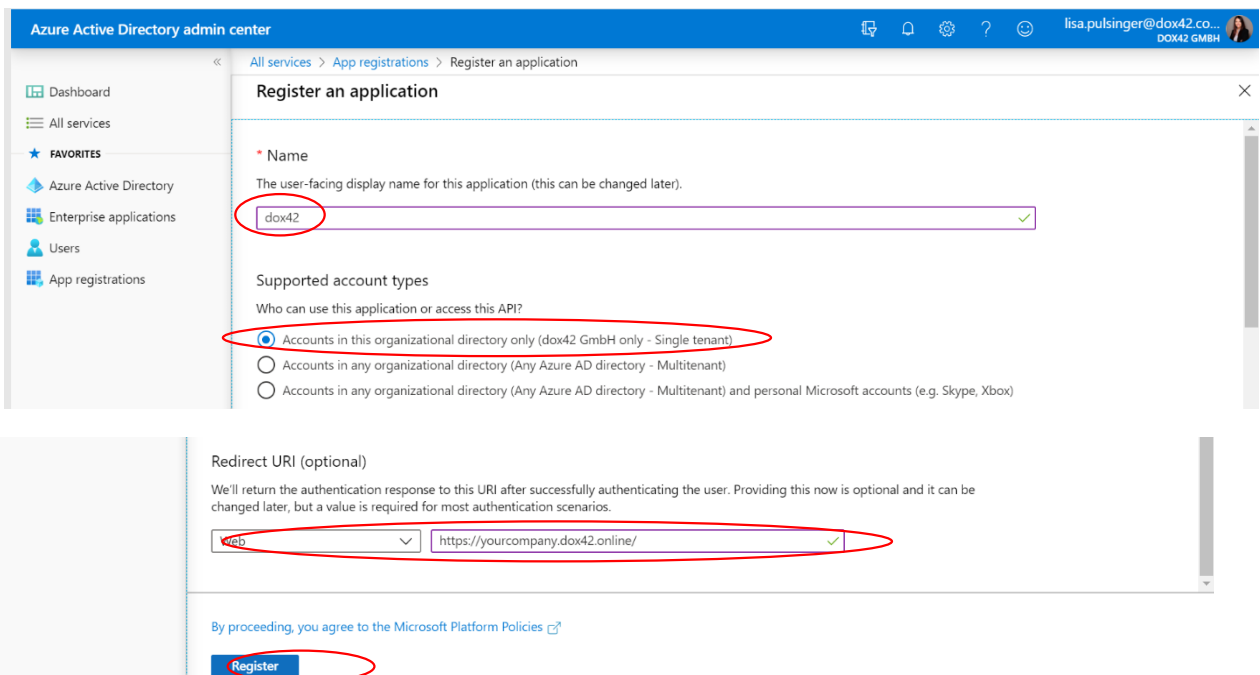
Firstly, you need to create an application in the Microsoft Azure AD admin center to set the AAD permissions for the dox42 Add-in and Server.

- Open the Office 365 Admin Center
- Go to -> **Admin centers** -> **Azure AD**, or click here in order to log in immediately: <https://aad.portal.azure.com>
- Click on **All services** -> **App registrations**

- Click on New Registration



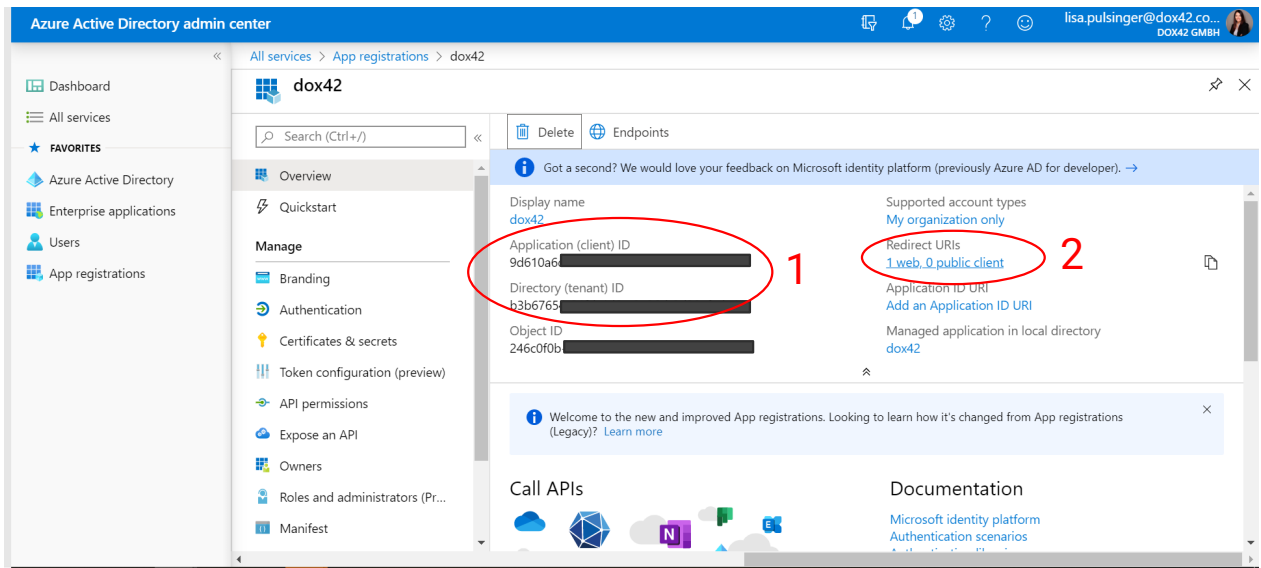
Name your application accordingly and choose which accounts should have access to your application. Also add a Web Redirect URI containing the link to your dox42 Server instance and click



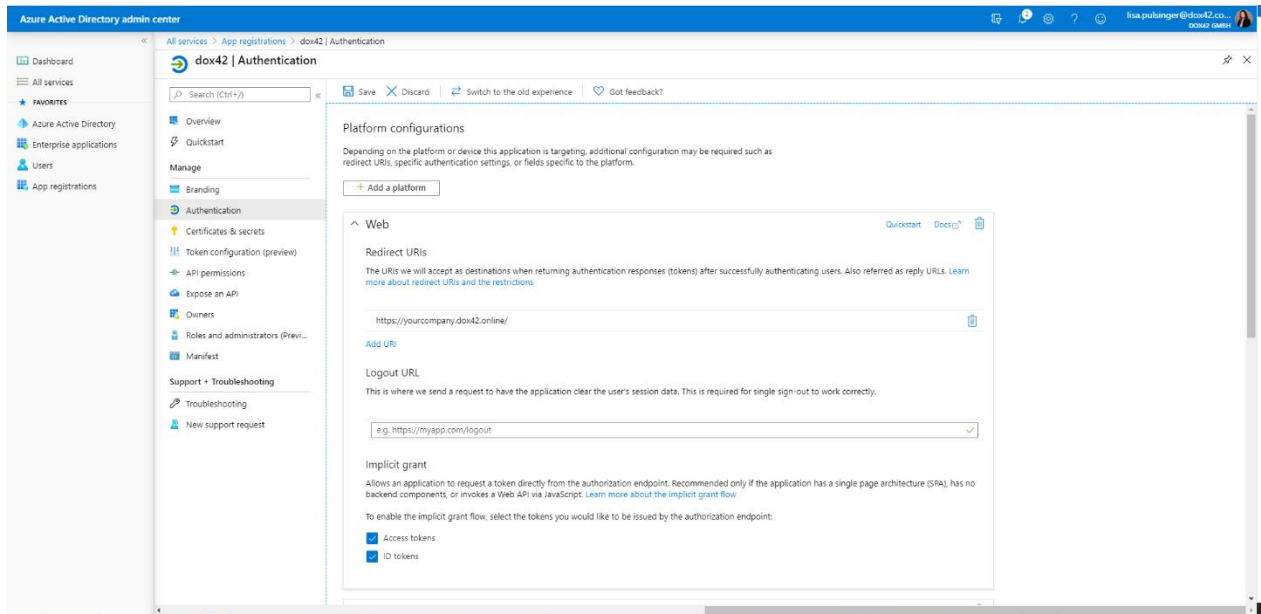
on Register:

Token Permissions

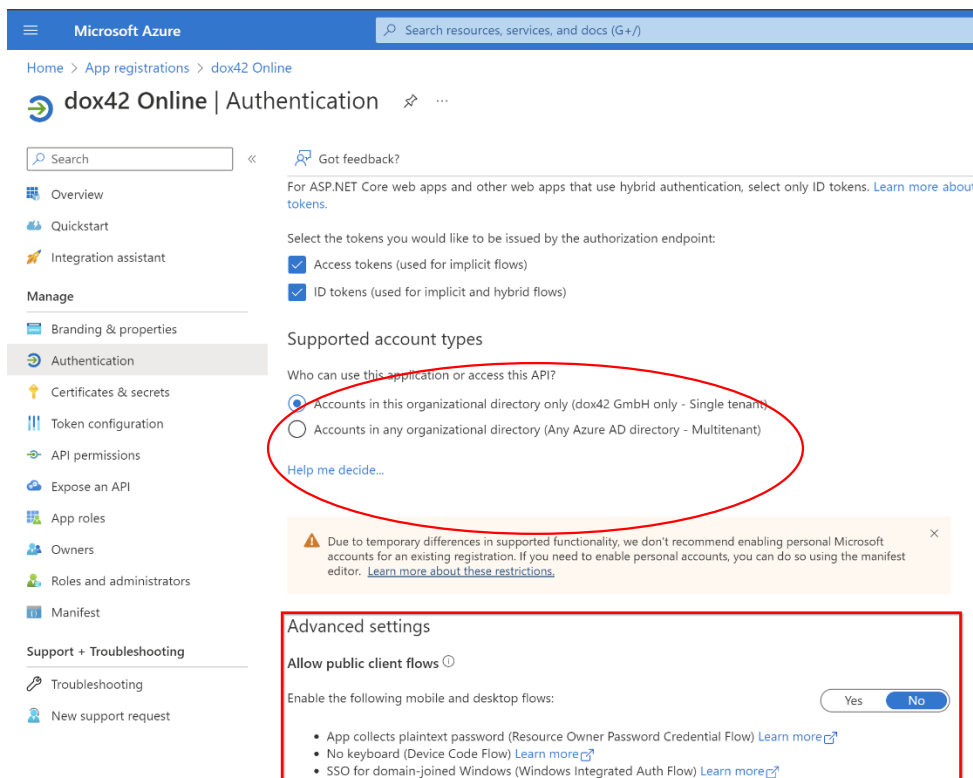
Next, you need to grant token permissions for your app. Within your newly added application, click on Redirect URIs (2).



Now, on the In the Implicit grants section of the Authentication register, tick both “Access tokens” and “ID tokens”:



Scroll down further to find additional settings. Under Advanced Settings keep “Allow public client flows” set on No.



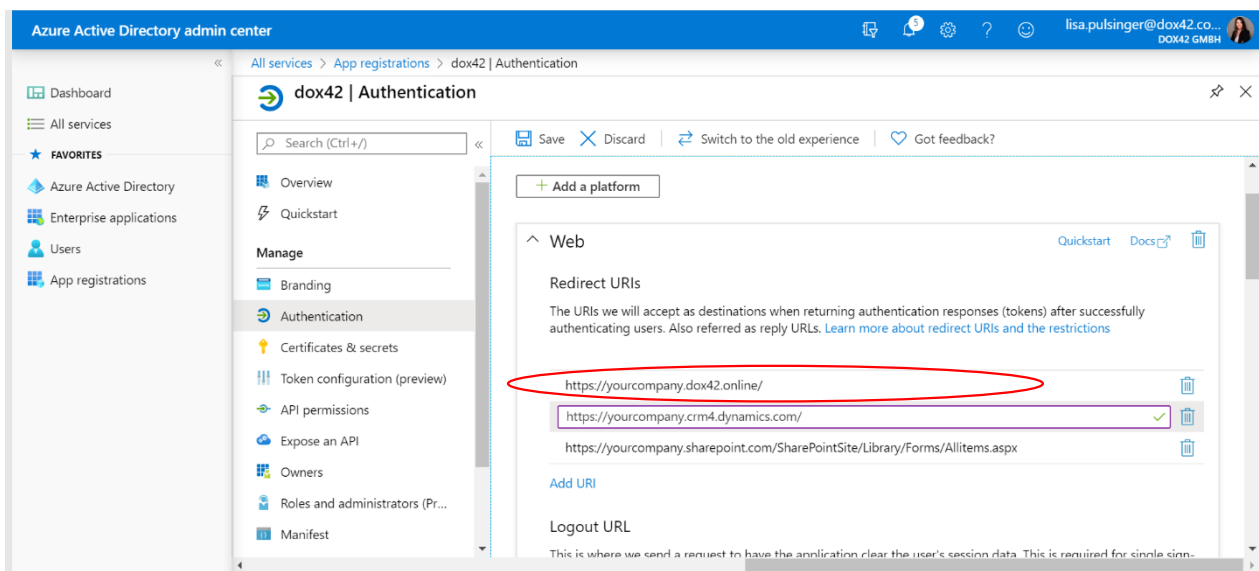
Enter Redirect URIs

Now scroll up again to the beginning of your Authentication page. You need to add Redirect URIs next. Please specify the following:

- your dox42 Online URL:
<https://yourcompany.dox42.online/>
- any additional URLs for applications you want to call the dox42 server from, e.g. Dynamics 365 CE/CRM. Please add the exact URLs where the dox42 Server will be called from. (e.g. <https://Yourcompany.crm4.dynamics.com/> for CRM or <https://global.consent.azure-apim.net/redirect> for Power Automate).

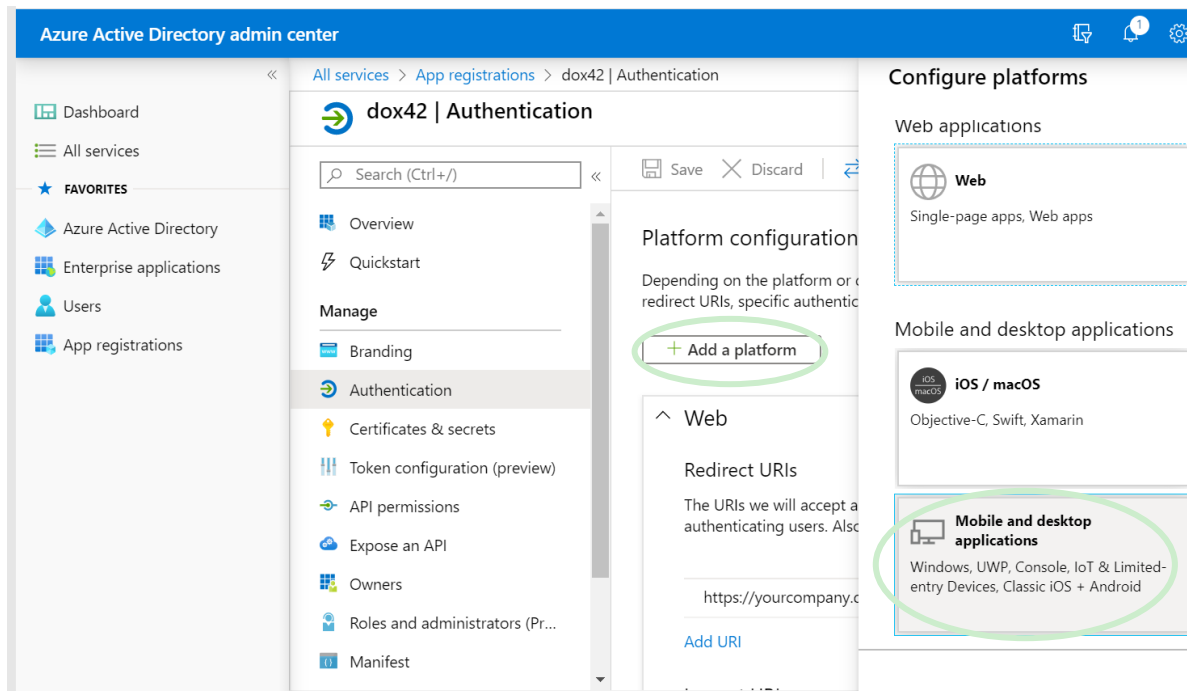
Note: You may NOT use wildcards (*). Microsoft changed this behavior during 2018, so you may find older working App registrations using wildcards, but new App registrations will not work with wildcards.

To use dox42 Online with D365 FSCM you will only need the dox42 Online URL like indicated in the red circle below:

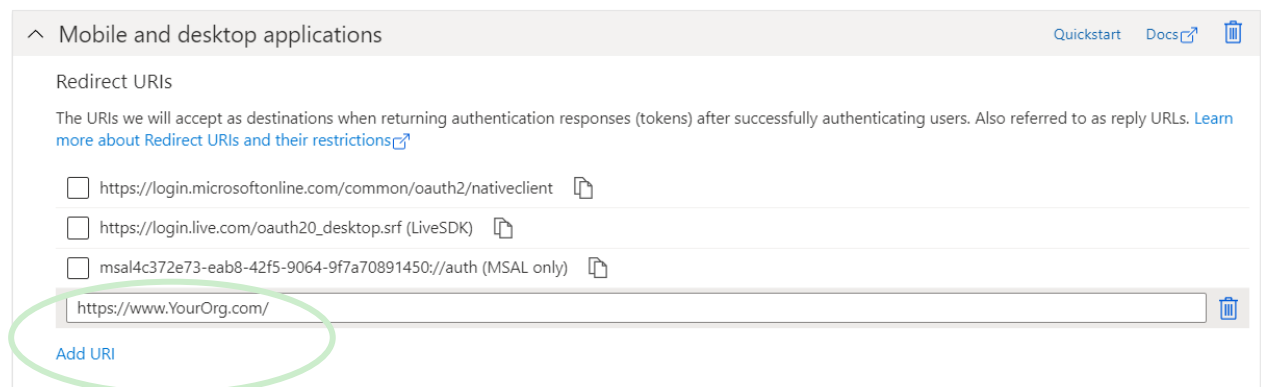


Add a mobile and desktop application for your dox42 Add-In

Now you need to add your dox42 Add-in as a “mobile and desktop application” to your app. On the top of the Authentication page, click on “Add a platform” and then on “Mobile and desktop application”.

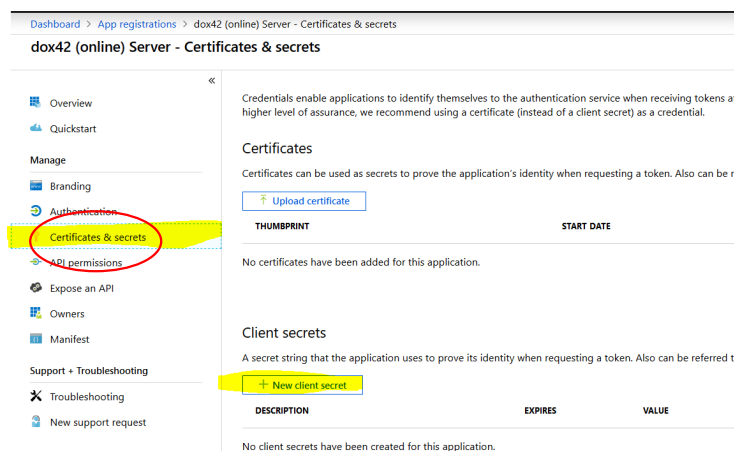


Add a custom redirect URI for your dox42 Add-in – we are using <https://www.YourOrg.com>. Then click on “Configure”.

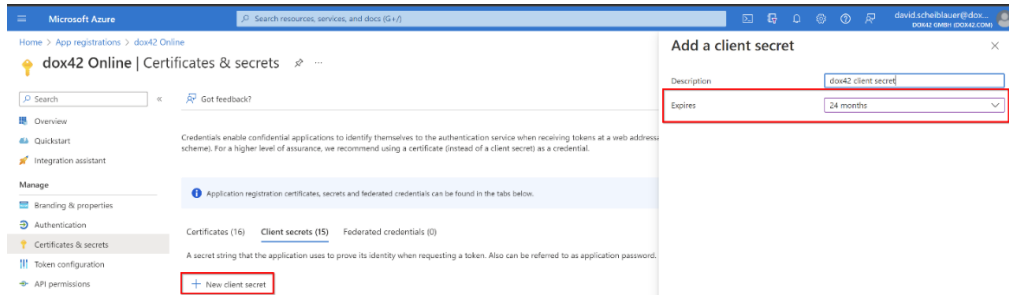


Add a Client Secret

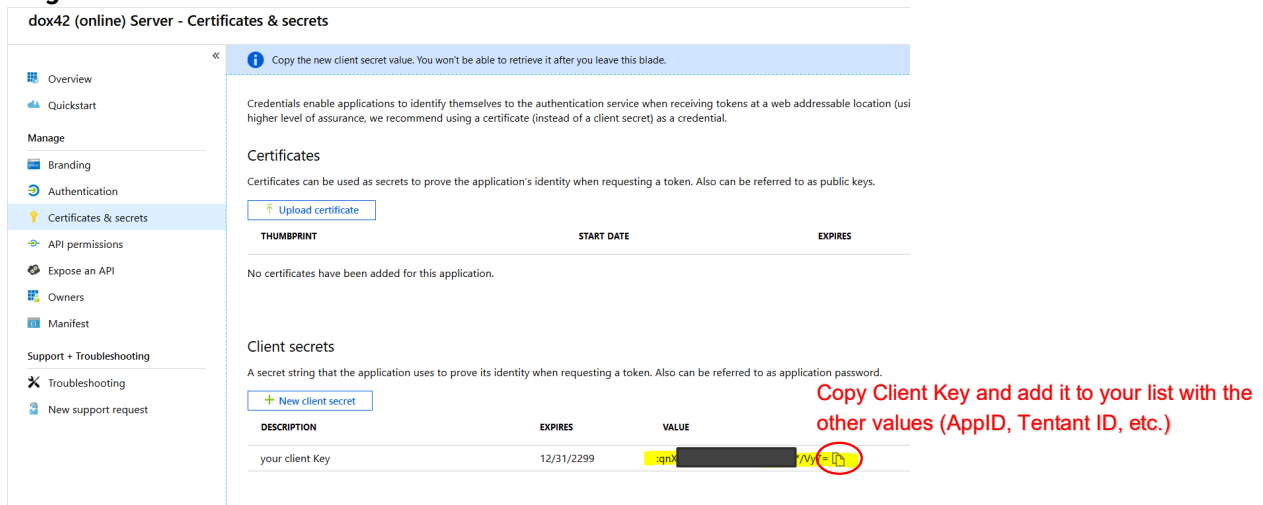
In the register **Certificates & secrets**, you need to add a new client secret.



Select your required expiry date (we recommend using “2 years”) and click Add. It is best practice to setup a reminder when the client secret will expire. That way you can create a new client secret and replace an old one before it expires.



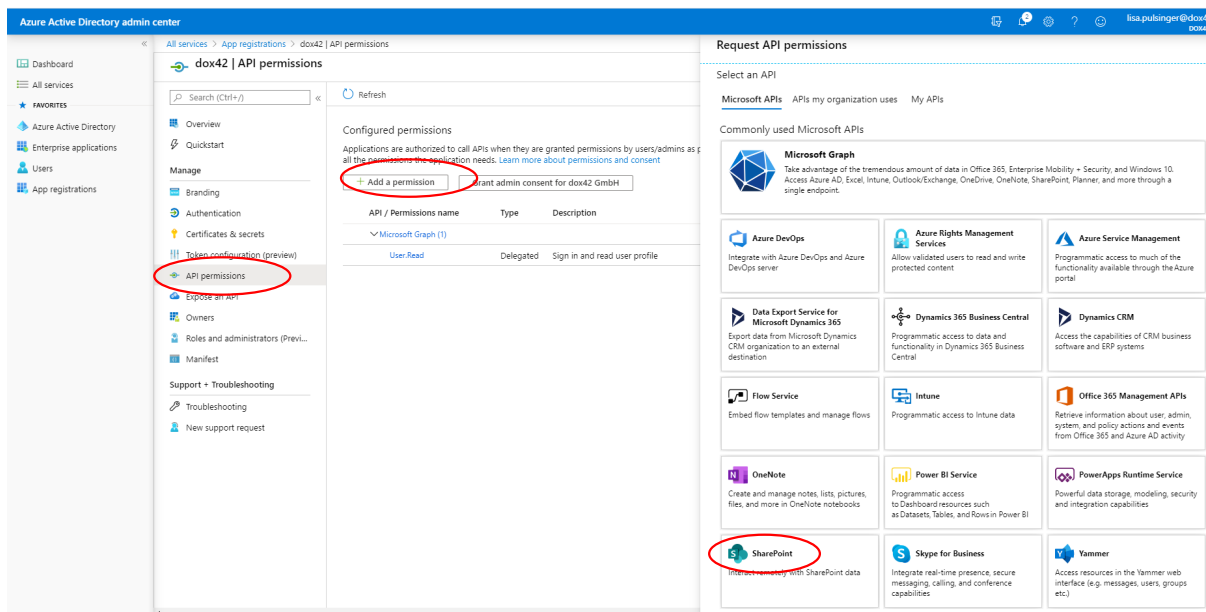
Make sure to **COPY** the Client Key, as it will be hidden afterwards and you will not be able to retrieve it again:



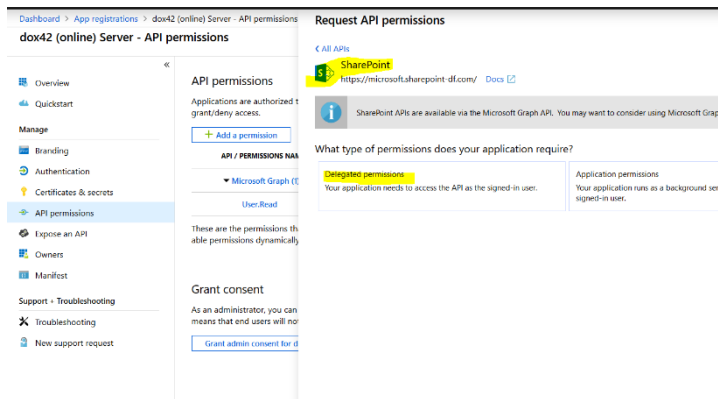
We will need the client secret in the dox42 Finance and Operations Configuration later on.

Add API Permissions

Move to the register API Permissions and click “Add a permission”. You need to grant delegated permissions for Sharepoint with AllSites.Write and AllSites.Read and application permissions for Sharepoint using Sites.ReadWrite.All.



More permissions might be necessary depending on your scenario. Please refer to the dox42 documentations of your additional modules (like CRM use the dox42 CRM documentation).



Next click on “Grant Admin Consent” for your company, to give your application the defined permissions (Alternatively, you can also later on click on “Consent” within the dox42 Add-in AAD connection):

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for dox42 GmbH

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for dox42 GmbH
SharePoint (3)				
AllSites.Read	Delegated	Read items in all site collections	No	✓ Granted for dox42 GmbH
AllSites.Write	Delegated	Read and write items in all site collections	No	✓ Granted for dox42 GmbH
Sites.ReadWrite.All	Application	Read and write items in all site collections	Yes	✓ Granted for dox42 GmbH

If you don't want to set the Application permissions to Sites.All, you can define specific Sites with Sites.Selected. For more information please refer to this MS article: <https://devblogs.microsoft.com/microsoft365dev/updates-on-controlling-app-specific-access-on-specific-sharepoint-sites-sites-selected/>

Your app registration is complete now, next you need to configure your dox42 Online accordingly.

2.6.2 dox42 Online Configuration

Once your set-up for your AAD app is finalized, you need to complete the configurations in your dox42 Server. If you work with dox42 Online, follow this chapter.

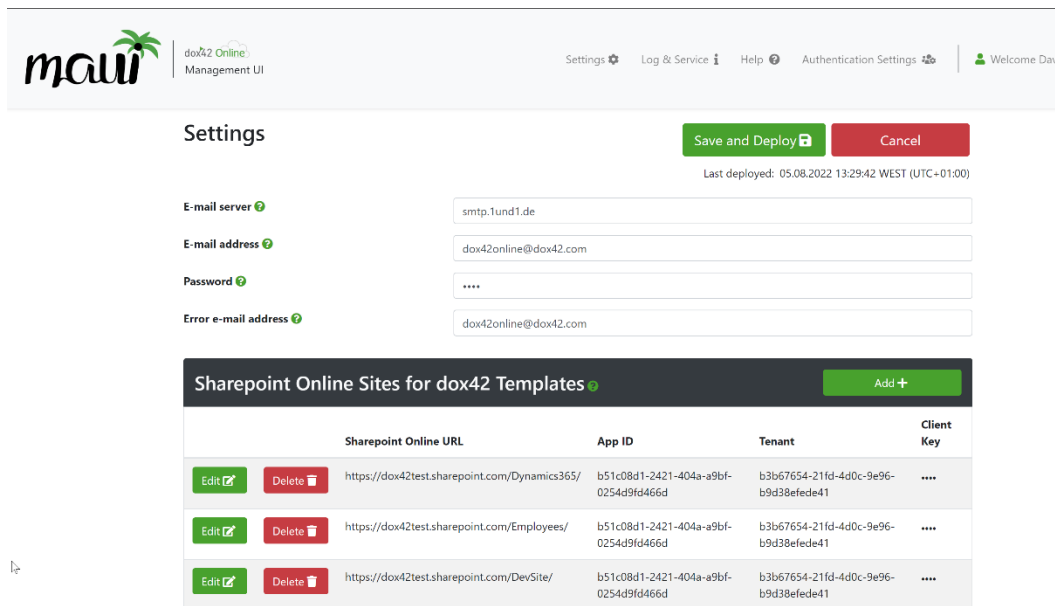
Please log into your dox42 Online Management UI (MAUI) with the user name and password received from dox42. The URL for your management app look similar to this:

<https://yourcompany.dox42.online/maui>



Add your AAD registration settings

1. Click on "Add" next to the "Sharepoint Online Sites for dox42 Templates" list and enter your SharePoint Online URL in this format: <https://yourcompany.sharepoint.com/site/> Each URL needs to be added with the App ID, Tenant ID and the generated Client Secret of the App registered in the Azure AD Admin Center like in this documentation above.
2. Configure your trusted template locations (Your templates have to be stored on SharePoint Online, the necessary links are again the Sharepoint Site URLs as defined in the above table)
3. Upload your Aspose license (not applicable for trial installations)
4. Click on "Save and Deploy" at the top of the page



Settings Save and Deploy Cancel

Last deployed: 05.08.2022 13:29:42 WEST (UTC+01:00)

E-mail server

E-mail address

Password

Error e-mail address

Sharepoint Online Sites for dox42 Templates Add +

	Sharepoint Online URL	App ID	Tenant	Client Key
Edit Delete	https://dox42test.sharepoint.com/Dynamics365/	b51c08d1-2421-404a-a9bf-0254d9fd466d	b3b67654-21fd-4d0c-9e96-b9d38efede41
Edit Delete	https://dox42test.sharepoint.com/Employees/	b51c08d1-2421-404a-a9bf-0254d9fd466d	b3b67654-21fd-4d0c-9e96-b9d38efede41
Edit Delete	https://dox42test.sharepoint.com/DevSite/	b51c08d1-2421-404a-a9bf-0254d9fd466d	b3b67654-21fd-4d0c-9e96-b9d38efede41

For more information regarding the MAUI, please refer to the tutorial video introducing MAUI on the dox42 Resource page: [https://www.dox42.com/de/Resources?filter\[\]=tutorialvideo&search=/maui/i&](https://www.dox42.com/de/Resources?filter[]=tutorialvideo&search=/maui/i&)

2.7 Installation of dox42 in D365 FSCM

dox42 for Finance and Operations adds a “dox42” package to D365 FSCM. The package contains all the integration components needed to seamlessly create documents directly from the Dynamics web client.

You could either install the Deployable Package or the Source Code (available on request from support@dox42.com). The Deployable Package contains the binaries only, the Source Code can be useful in case you want to develop your own extensions or if you want to debug something.

Regardless of which option you chose, we recommend integrating the solution into your Azure Dev Ops Repository. This allows to deploy the dox42 package as part of your regular build and release process.

You will find further information on <https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/deployment/apply-deployable-package-system> as well as <https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/dev-tools/manage-runtime-packages>.

After successfully installing the deployable package, the next step is to configure D365 FSCM to work with the dox42 Server.

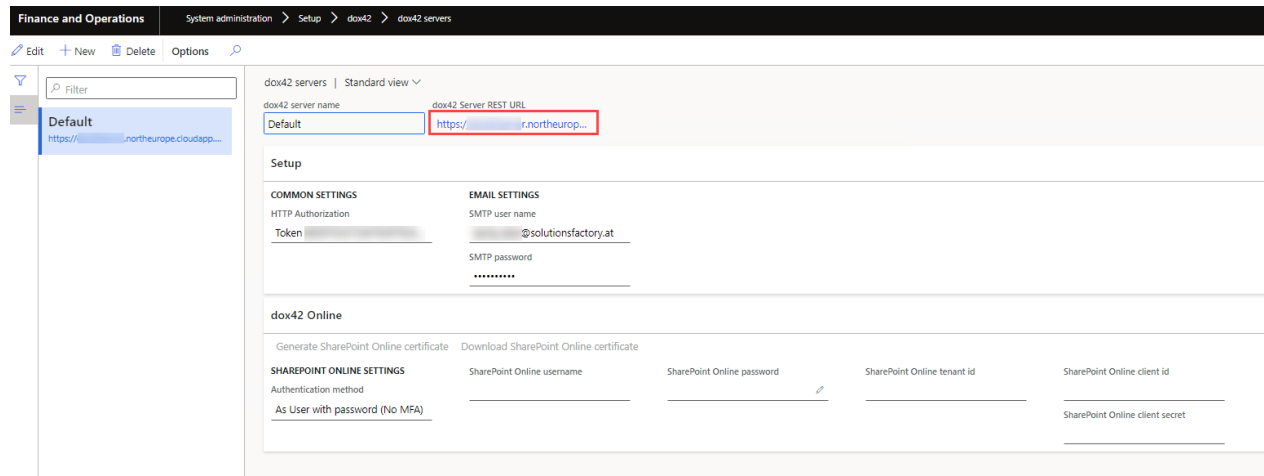
Under **System administration > Setup > dox42 > dox42 servers**, setup the dox42 server settings.

Under **System administration > Setup > dox42 > dox42 parameters**, select the **General** tab page.

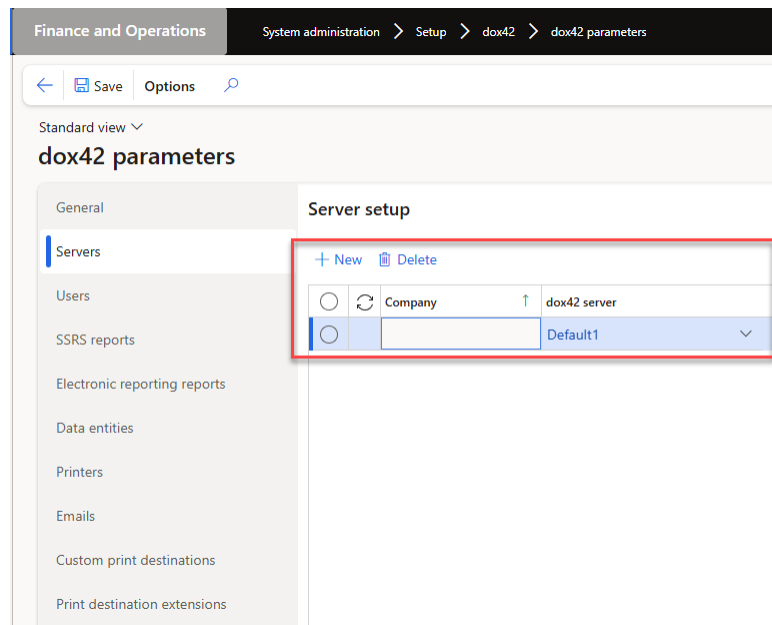
Create a new default server setup record by clicking on **New**.

2.7.1 Installation for dox42 Server

Enter the path to the dox42 server service to the field **dox42 Server REST URL**.



Set up default dox42 server.



2.7.2 Installation for dox42 Online

Go to dox42 Online MAUI> Log & Service and copy the dox42 REST service.

Log & Service

Service data

dox42 Server Version: 4.6.4.0

Service valid until: NA

Domain: <https://dox42demo.dox42.online/> 🖨

SOAP: <https://dox42demo.dox42.online/dox42Service.asmx> 🖨

REST: <https://dox42demo.dox42.online/dox42RestService.ashx> 🖨

Your dox42 additional modules

✓ dox42 D365 FO (Version 1.2.16)

✓ dox42 D365 CE (Version 4.4.4.3)

✓ dox42 D365 BC

✓ dox42 SAP (Version 4.1.1.0)

Include all previously configured parameters in the dox42 servers (it is recommended to use the "POST (Base64)" HTTP method):

- REST URL
- dox42 Online Username / Password > The Microsoft 365 User that has access to the template
- dox42 Online Tenant ID
- dox42 Online Client ID
- dox42 Online Client Secret

Finance and Operations | System administration > Setup > dox42 > dox42 servers

Save + New Delete Options

Filter

Default

Standard view

dox42 servers

dox42 server name: Default dox42 Server REST URL: [redacted]

Setup

COMMON SETTINGS	EMAIL SETTINGS
HTTP Authorization: [redacted]	SMTP user name: [redacted]
HTTP method: POST (Base64) ▼	SMTP password: [redacted]

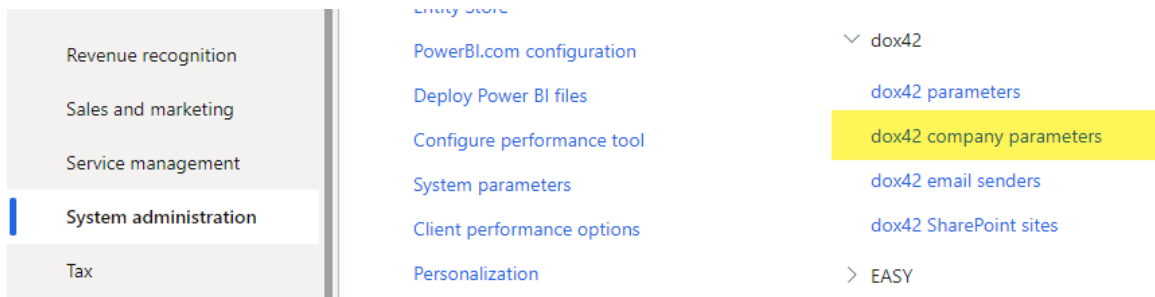
dox42 Online

Generate SharePoint Online certificate Download SharePoint Online certificate Restore SharePoint Online certificate

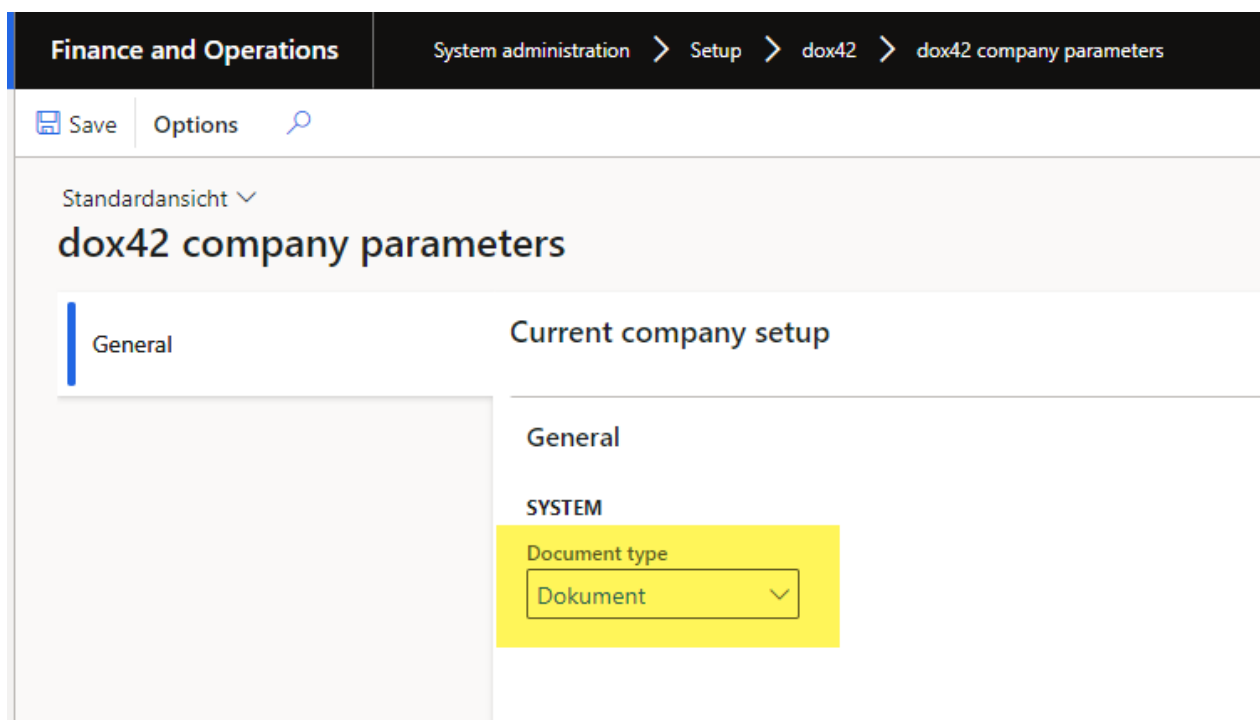
SHAREPOINT ONLINE SETTINGS	SharePoint Online username	SharePoint Online tenant id	SharePoint Online client id
Authentication method: As User with password (No M... ▼)	[redacted]	[redacted]	[redacted]
	SharePoint Online password: [redacted]		SharePoint Online client secret: [redacted]

2.7.3 Document type

For registration the document type, which dox42 should use, a setup in the “dox42 company parameters” is needed.



In the drop down menu, which displays all needed document types are available.



We recommend using type MS Azure blob storage for the document type.

2.7.4 SharePoint Online certificate setup

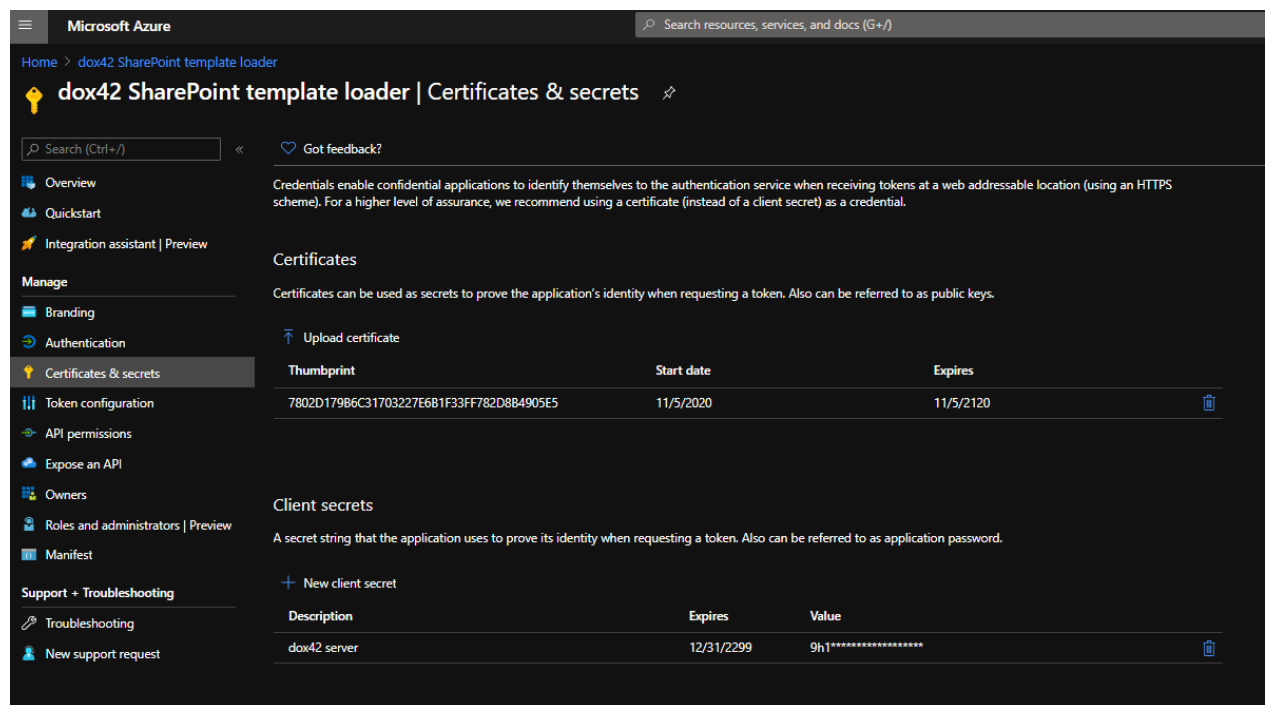
Fill the values in the order provided below using application registration parameters (take 6 and 7 from the created app registration):

Once you got the certificate downloaded (step 4 in the screenshot above), upload it to Azure AD application registration certificates.

Thumbprint	Start date	Expires
7802D179B6C31703227E681F33FF782D8B4905E5	11/5/2020	11/5/2120

Name	Date modified	Type	Size
dox42Cert.cer	05-Nov-20 09:30 AM	Security Certificate	1 KB

Here's how it should look like:



Microsoft Azure | dox42 SharePoint template loader | Certificates & secrets

Search (Ctrl+/) | Got feedback?

Overview
Quickstart
Integration assistant | Preview

Manage
Branding
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
Owners
Roles and administrators | Preview
Manifest

Support + Troubleshooting
Troubleshooting
New support request

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Certificates
Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

Thumbprint	Start date	Expires
7802D179B6C31703227E681F33FF782D8B4905E5	11/5/2020	11/5/2120

Client secrets
A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

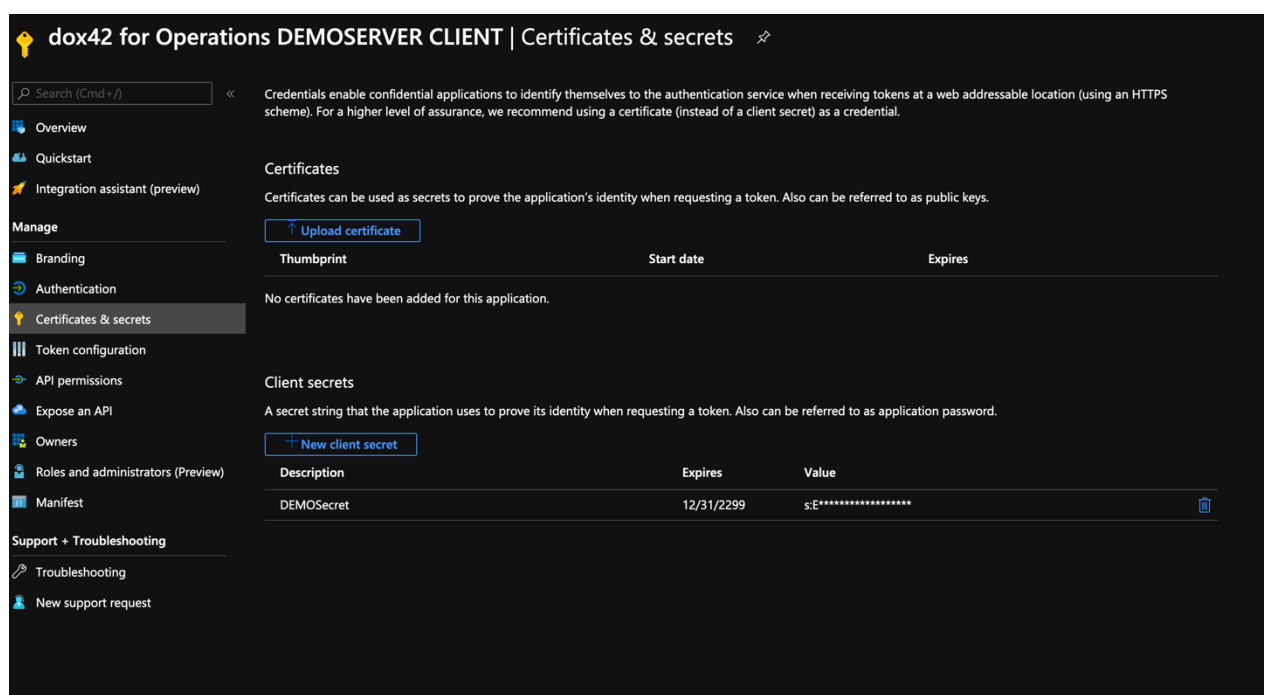
New client secret

Description	Expires	Value
dox42 server	12/31/2299	9h1*****

2.8 Reading data with Service User or AzureAD App (required for multifactor authentication)

For the multifactor authentication a new app in Azure is necessary. You can also use your dox42 Online app. The app will be mapped inside D365 FSCM to a specific (service) user and claim its roles and rights.

Create a new App Registration and Secret like in the dox42 Online Setup. These will be your sign-in credentials in the Word Add-in.



dox42 for Operations DEMOSERVER CLIENT | Certificates & secrets

Search (Cmd+/) | Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Overview
Quickstart
Integration assistant (preview)

Manage
Branding
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
Owners
Roles and administrators (Preview)
Manifest

Support + Troubleshooting
Troubleshooting
New support request

Certificates
Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

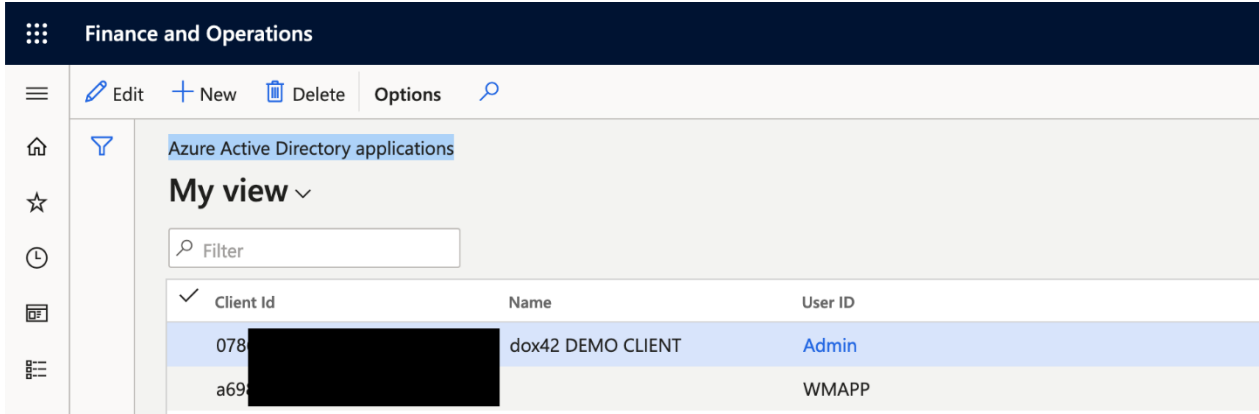
No certificates have been added for this application.

Client secrets
A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

New client secret

Description	Expires	Value
DEMOSecret	12/31/2299	s:E*****

Next, add your Client ID to the D365 FSCM mapping configuration. The table can be found under System Administration -> Setup -> Azure Active Directory applications. Fill in your Client ID, give it a name optionally and map it to a specific (service) user inside of D365 FSCM.

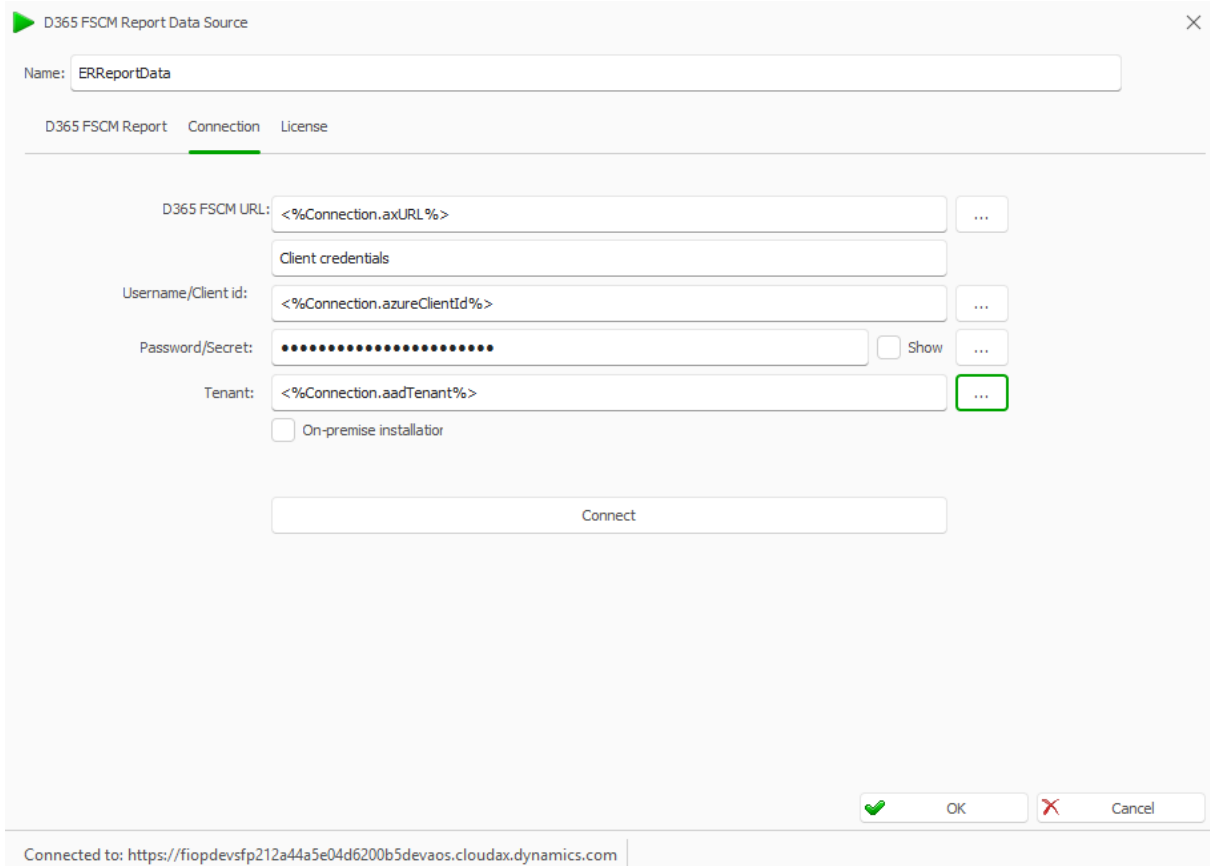


Client Id	Name	User ID
078...	dox42 DEMO CLIENT	Admin
a69...		WMAPP

A connection Excel file with the following components should then be created. For more details on this please see the chapter Creating a dox42 report below.

- URL
- Client ID
- Secret from the azure app
- TenantId

Use those newly created credentials to connect to your D365 FSCM instance, by either filling them in directly, or - the more recommended approach – by using your created Credentials Excel sheet.



D365 FSCM Report Data Source

Name: ERReportData

D365 FSCM Report Connection License

D365 FSCM URL: <%Connection.axURL%>

Client credentials

Username/Client id: <%Connection.azureClientId%>

Password/Secret: Show

Tenant: <%Connection.aadTenant%>

☐ On-premise installation

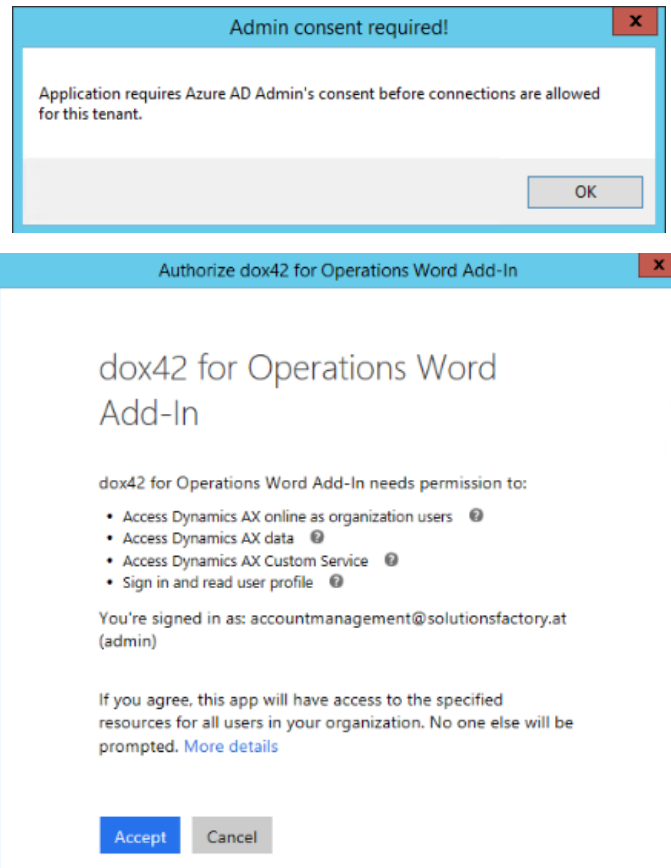
Connect

Connected to: https://fiopdevsp212a44a5e04d6200b5devaos.cloudax.dynamics.com

2.9 dox42 for D365 Finance & SCM Setup Connection to D365 FSCM

2.9.1 Establishing connection

To establish a new connection to your dox42 for Finance & SCM instance, simply fill out the form in the "Connection" tab. Please note, that on the first run through of the authentication process, an Azure AD Admin must approve/consent the application, to allow the sign in of users and access to the data.



You can use data fields of another data source for every value in the "Connections" tab. This way, you can enter username and password once in a central place and use it for different connection, more is

described in later chapters. If a multi factor authentication is setup the “Connection” tab contains additional information, therefore the created excel from the chapter above must be used.

The screenshot shows a dialog box titled "D365 FSCM Report Data Source" with a close button (X) in the top right corner. Below the title bar, there is a "Name:" field containing the text "PurchPurchOrder". Below this, there are three tabs: "D365 FSCM Report", "Connection" (which is selected and highlighted with a blue underline), and "License". The "Connection" tab contains several input fields and a "Connect" button. The fields are: "D365 FSCM URL:" with a text box and a dropdown arrow; "Client credentials" with a text box; "Username/Client id:" with a text box and a dropdown arrow; "Password/Secret:" with a text box, a "Show" checkbox, and a dropdown arrow; "Tenant:" with a text box and a dropdown arrow; "Authority:" with a checked checkbox labeled "On-premise installer" and a text box with a dropdown arrow. At the bottom of the dialog box, there are "OK" and "Cancel" buttons with a green checkmark icon next to the "OK" button.

2.9.2 Testing setup with empty template

It is recommended at the beginning to test the needed connection setup for your new template and then start with the design of it. Here is a brief plan of how to do that:

- Setup the connection for your template
- Try to generate empty document
- If succeeded, then can continue with the design

3 Working with dox42 reports

3.1 Basic setup

3.1.1 Creating a folder structure for efficient working

- 1 Create one folder for each environment

This PC ► Local Disk (C:) ► dox42Server ► templates ►

Name	Date modified
Live	5/30/2019 8:02 AM
Test	5/30/2019 8:02 AM

- 2 Create a folder for each report which should be designed in dox42

View

PC ► Local Disk (C:) ► dox42Server ► templates ► Test ►

Name	Date modified	Type
PackingSlip	5/30/2019 7:58 AM	File folder
SalesConfirm	5/30/2019 7:58 AM	File folder
SalesInvoice	5/30/2019 7:58 AM	File folder

- 3 Insert a Word document into the report folder which will be used as a template to design the report.
- 4 Create an Excel document and save it on the root folder above the system folder, this file will be used for saving the connection information (in this case it is named "Connection")

This PC ► Local Disk (C:) ► dox42Server ► templates ► Test ►

Name	Date modified
PackingSlip	4/2/2020 4:08 PM
SalesConfirm	5/30/2019 8:50 AM
SalesInvoice	4/2/2020 4:08 PM
Connection	1/22/2019 2:42 PM

3.1.2 Components of a report

A report consists of the following components:

- Word document with a Add In
This Word document shows the basic structure of the report, it contains all design components which are later represented in the finished report.
- Connection Excel file:
The connection file stores all the information which are needed to create a connection to the D365 FSCM

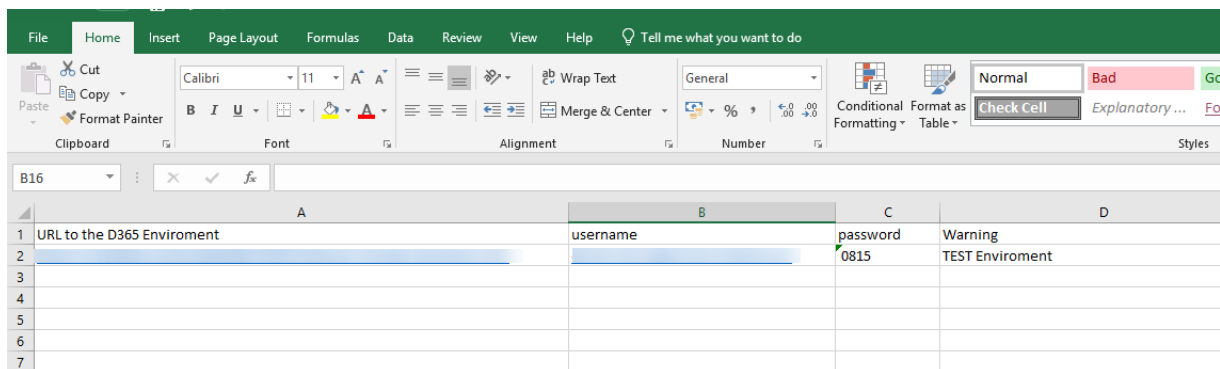
- **Data Map**
The Data Map is necessary to get access to all required information like the connection Excel file or the data sources.

3.1.3 Setup of the connection Excel file

The connection Excel file is a file which stores all needed information to create a connection to D365 FSCM environment. How to use it will be described in the chapter below.

Setup the connection Excel file with the columns. If you decide to go for AzureAD App Login please use the same configuration and just name the parameters accordingly (URL, Client ID, Secret, Tenant ID).

- **URL:** D365 FSCM URL
- **Username:** The AAD User
- **Password:** password (we recommend using an encrypted password as described later in the document)
- **Warning message:** warning message (will be shown as a watermark).
Usage: e.g. if the sales invoice is printed from the test environment, to clearly show it is not an original sales invoice from a live environment



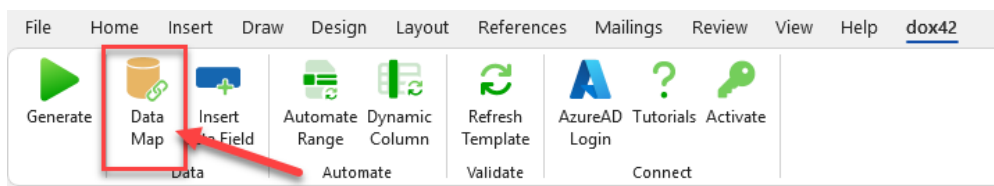
	A	B	C	D
1	URL to the D365 Enviroment	username	password	Warning
2			0815	TEST Enviroment
3				
4				
5				
6				
7				

3.1.4 Creating a standard Data Map

The advantage of having a standard Data Map is that it can be copied and used for other reports with minimal effort.

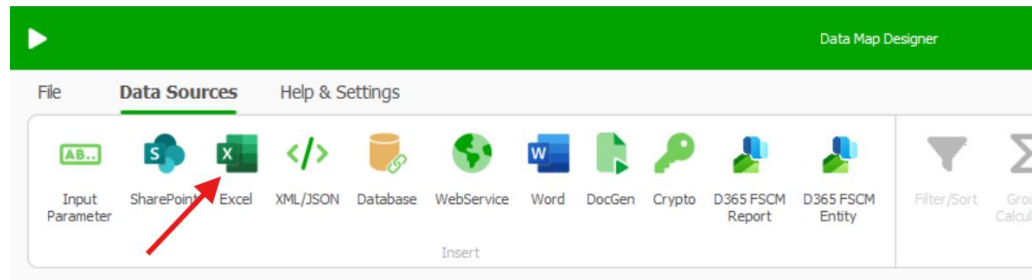
Please make sure to save your Word document on your computer before adding Data Map to it. It is recommended to have the template named the same as the Data map.

Open the Data Map of a template by going to the tab “dox42” and clicking on the button “Data Map”.

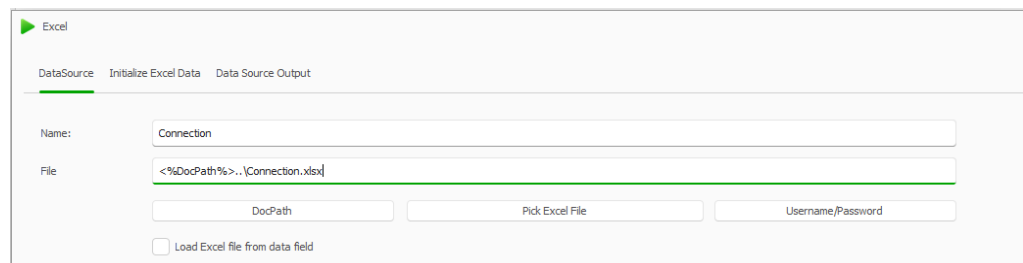


1 Setting up the connection Excel file

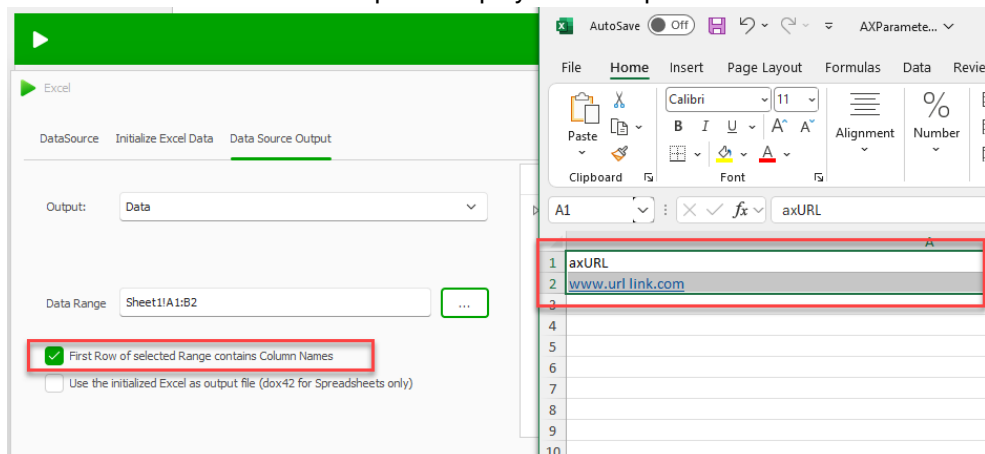
- Click on the “Excel”



- Insert a name for the connection file
- Insert the path from the connection file, always using the “<%DocPath%>”. The “..\” tells the system to look a level above in the folder structure and there it will find an Excel file named “Connection.xlsx”. Using the “DocPath” makes it possible to copy the data map and insert it to another report folder without the need of changing the path.



- Mark the checkbox “First Row of selected Range contains Column Names”
Click on the button with the three dots to select the fields from the Excel file. Mark the area with all the data. An example is displayed on the picture below.

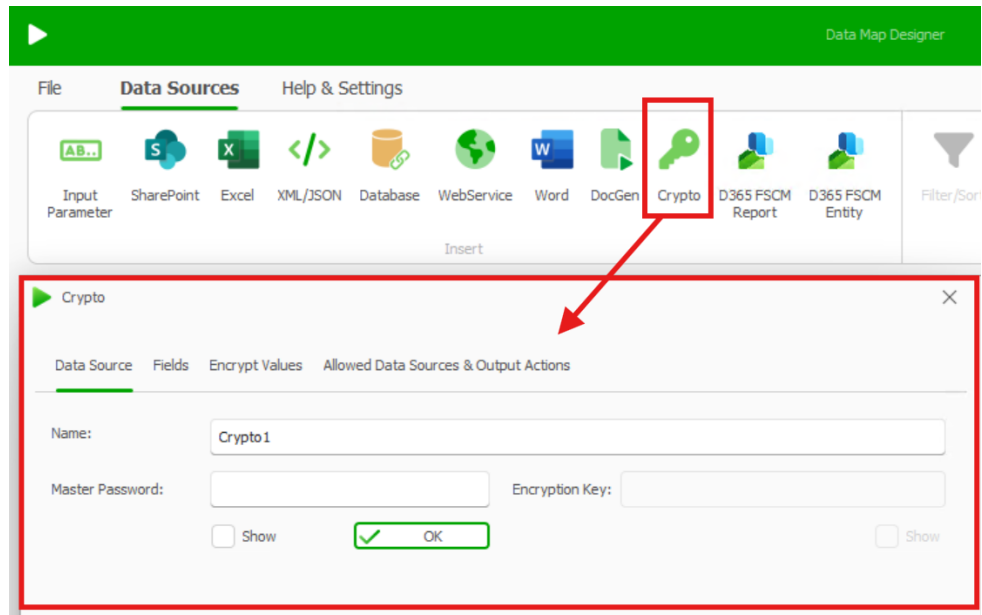


- Click the button “ok”, now the connection file is setup.

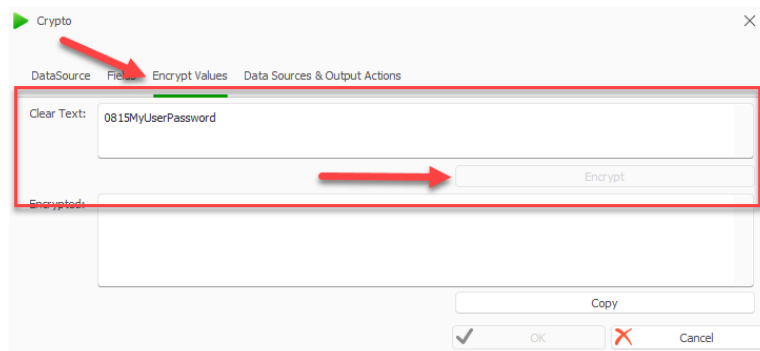
2 Creating a **Crypto Data Source**

- Click on the button “Crypto Data Source” in the Data Map
- Insert a name for the Crypto Data Source

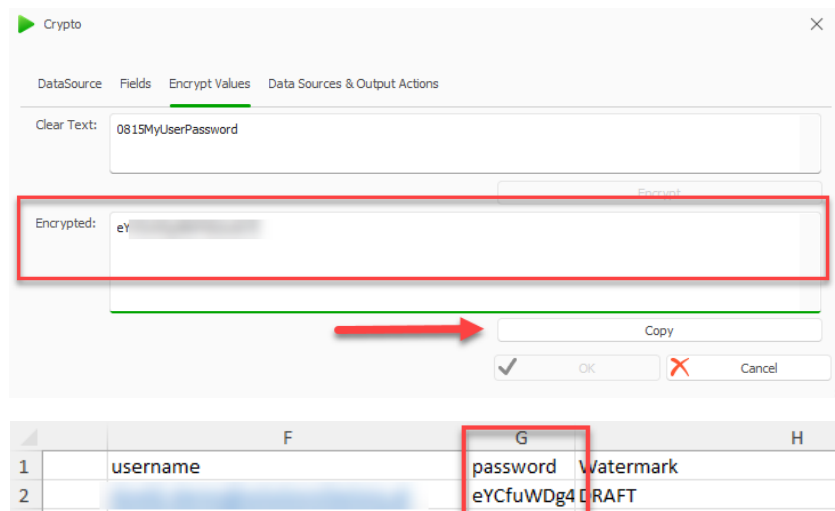
- c. Enter a “Master Password” and an “Encryption Key”, which will be used to encrypt the password



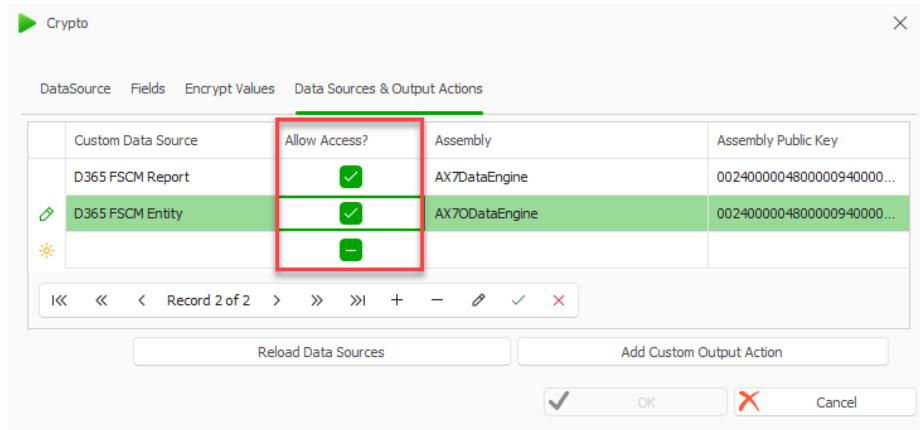
- d. Click on the tab “Encrypt Values” and insert the password from the ADD User inside the field “Clear Text”.



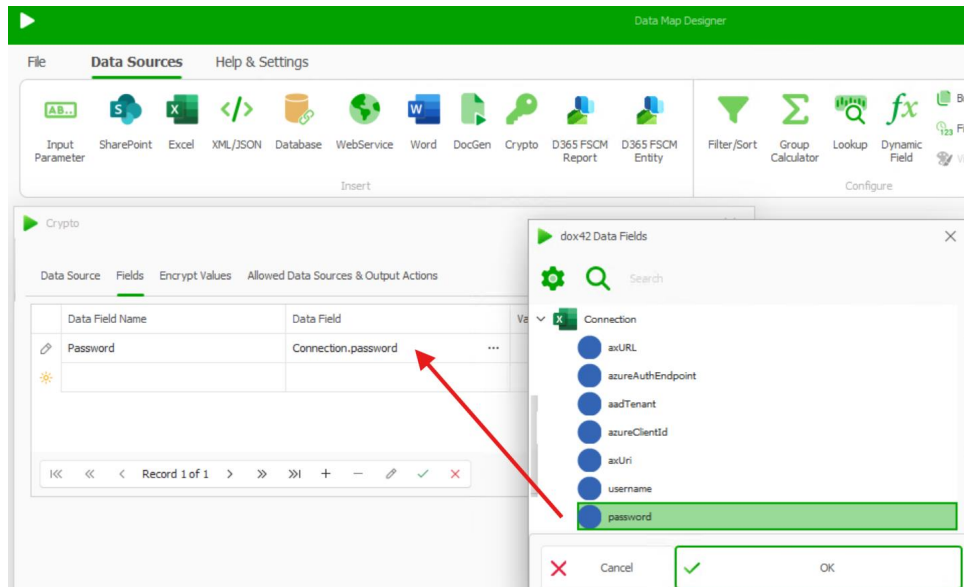
- e. Click on the button “Encrypt”
- f. Copy the displayed result in the area “Encrypted” and insert it in the connection Excel file instead of the cleartext password



- g. Click on the tab “Data Sources&Output Actions” and allow access to the Customer Data Sources like in the picture below.





- h. Click the button “OK”
- i. Open the new Crypto Data Source and click on the tab “Fields”
- j. Insert a password field, with a double click on the field “Data Field”, a lookup window will appear, illustrated in the picture below. Select the password field from the connection Excel file.



- k. With a click on the button “ok” the Crypto Data Source is setup

Save the Data Map in the same folder as the template. This Data Map can be copied and used in every template which works with the same D365 FSCM environment. Each report needs a Data Map. Copy the standard Data Map and insert it into each report folder.

PC ► Local Disk (C:) ► dox42Server ► templates ► Test ► SalesConfirm		
Name	Date modified	Type
 datamap.dm	5/23/2019 8:17 AM	DM File
 SalesConfirm	5/23/2019 8:12 AM	Microsoft Word D...

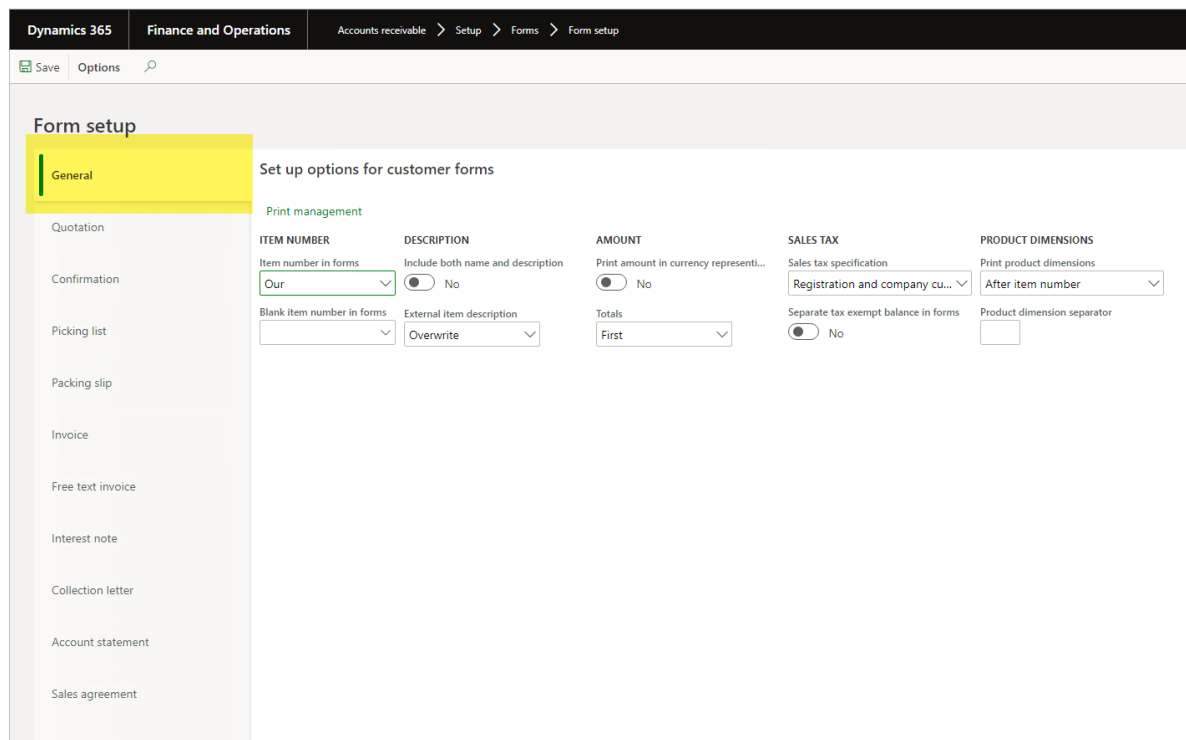
3.2 Create your first dox42 report

This chapter will describe how to setup a report from copying the standard Data Map to display it in D365 FSCM.

3.2.1 General facts about the DataProvider of dox42

dox42 uses the same DataProvider as a SSRS report, therefore all the necessary setup which are influencing the DataProvider from the D365 FSCM side are also influencing the DataProvider of dox42. An example would be the form setup in the "Accounts receivable". (Accounts receivable > Setup > Forms > Form setup).

The form setup contains the general setup (Tab "General") of a report as well as a specific one.



Dynamics 365 Finance and Operations Accounts receivable > Setup > Forms > Form setup

Save Options

Form setup

General | Set up options for customer forms

Print management

ITEM NUMBER

Item number in forms: ☐ No

Blank item number in forms: ☐ No

DESCRIPTION

Include both name and description: ☒ Yes ☐ No

External item description:

AMOUNT

Print amount in currency represent...: ☒ No

Totals:

SALES TAX

Sales tax specification:

Separate tax exempt balance in forms: ☒ No

PRODUCT DIMENSIONS

Print product dimensions:

Product dimension separator:

Quotation

Confirmation

Picking list

Packing slip

Invoice

Free text invoice

Interest note

Collection letter

Account statement

Sales agreement

Dynamics 365

Finance and Operations

Accounts receivable > Setup > Forms > Form setup

Save

Options

Form setup

General

Quotation

Confirmation

Picking list

Packing slip

Invoice

Free text invoice

Interest note

Collection letter

Account statement

Sales agreement

Set up options for customer invoices

LAYOUT

Paper format

Blank paper

Blank paper

☐ Print packing slip specifications

☐ Print tax exempt number on inv...

NOTE

Include document on sheets

None

Include documents of type

SHOW IN SHEET

☐ Configuration

☐ Size

☐ Color

☐ Style

☐ Site

☐ Warehouse

☐ Inventory status

☐ Location

☐ License plate

☐ Batch number

☐ Serial number

☐ Owner

BACKORDER

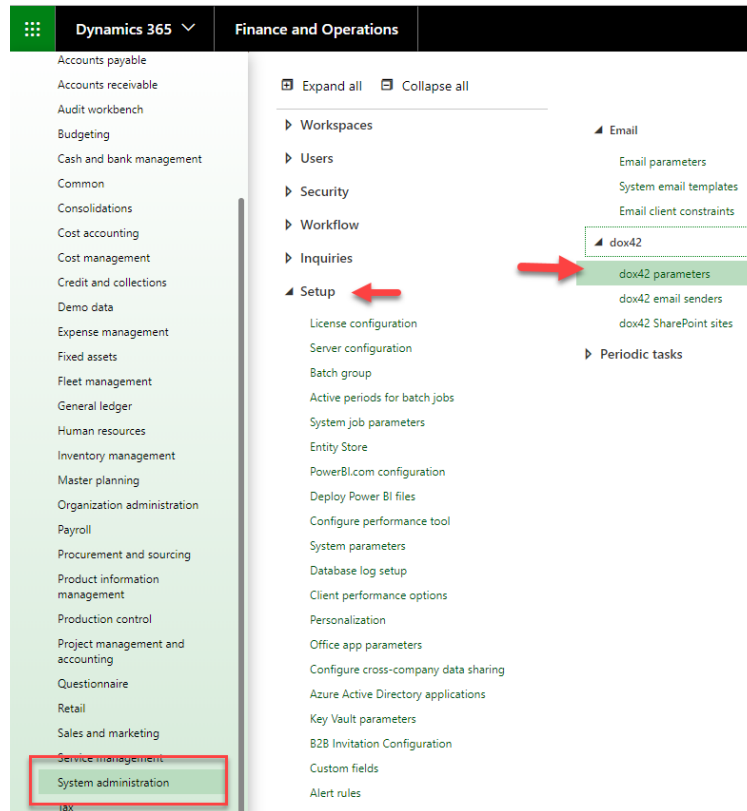
Backorder tracking

No tracking

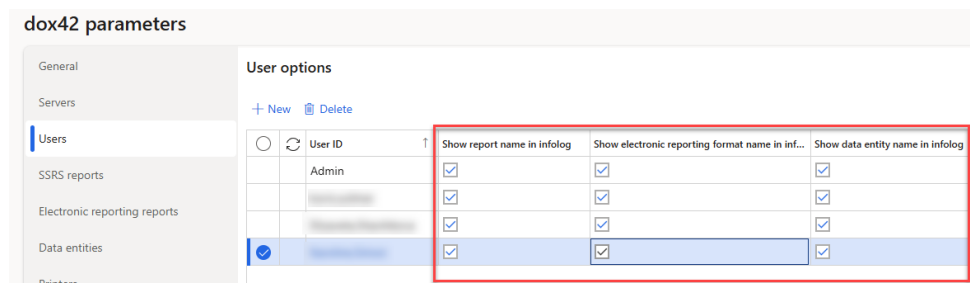
3.2.2 The basic steps for creating any dox42 report in D365 FSCM

This chapter describes the presetting which are required for designing a new dox42 report, in the D365 FSCM environment.

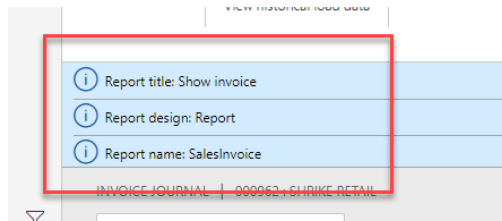
- 1 Get to know which report is called
 - a. Go to **System administration > Setup > Business intelligence > dox42 > dox42 parameters**



- b. In the tab “Users” add a new entry with the currently signed in User ID and check the **“Show report name in Infolog”**, **“Show electronic reporting format name in Infolog”** and **“Show data entity name in Infolog”** checkbox.

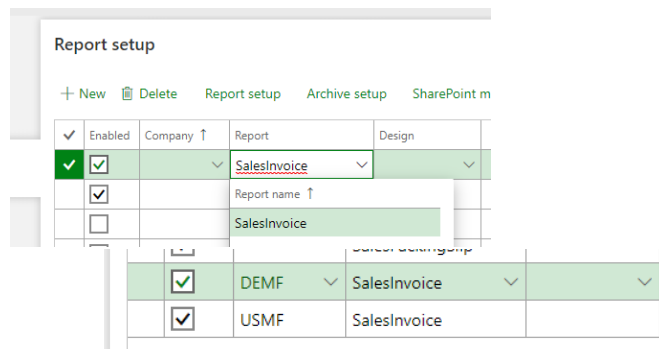


- c. Switch back to the report (in D365 FSCM) which should be designed in dox42 and print the report. An Infolog will appear with the name and the design name of the report. This information will be needed in the next step.

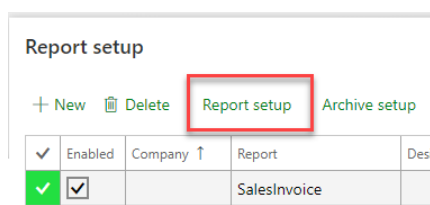


2 Setup the report

- a. In the **dox42 parameters**, select the tab “Reports”
- b. Create a new record.
- c. Select the report name which was displayed in the first step. D365 FSCM provides to possibility to set up the same report multiple times and divide it by the company like in the second picture below.



- d. The “Serialization type” parameter defines how the report data will be serialized during the report execution:
 - i. “Web service” – recommended value (by default, since version 1.3.1)
 - ii. “Web service (compatibility mode)” – this value is used to provide a backward compatibility with the older version report templates. Be careful changing this parameter for the existing templates, because the linked report templates may stop working after that. To restore functionality, you must set back the original value of the serialization type or regenerate the report metadata and recreate the data sources in the report template data map.
- e. Mark the report and click on the button “Report setup” and create a new record



- f. Insert the path of the template e.g.
C:\dox42Server\templates\Test\SalesInvoice\SalesInvoice.docx

Company	Language	Design	Title	Template name

It is possible to create more than one template for the same report and divide it by company and/or by language.

Language	Design	Title	Template name
en-us			C:\dox42Server\templates\Test\SalesInvoice\SalesInvoice_EN.docx
de-at			C:\dox42Server\templates\Test\SalesInvoice\SalesInvoice_DE.docx

3 Get the Metadata for the report

- a. Print the report
- b. Check if the checkboxes by the report setup are marked like in the picture below, the system will automatically synchronize the report.

Enabled	Co.	Report	Design	Operation	Maximum nest...	Cleanup	Show SSRS pr...	Metadata exists	Synchronized	Sender t
<input checked="" type="checkbox"/>		FreeTextInvoice		Generate...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		Giro		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		ProdJobCard		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		ProdPicklist		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		PurchPackingSlip		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		RetailLabel		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		RetailLabel	A4Landscape3X5...	GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		RouteOpr		GenerateDocu...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Now the report is available for the templates on the dox42 Server, which are needed below.

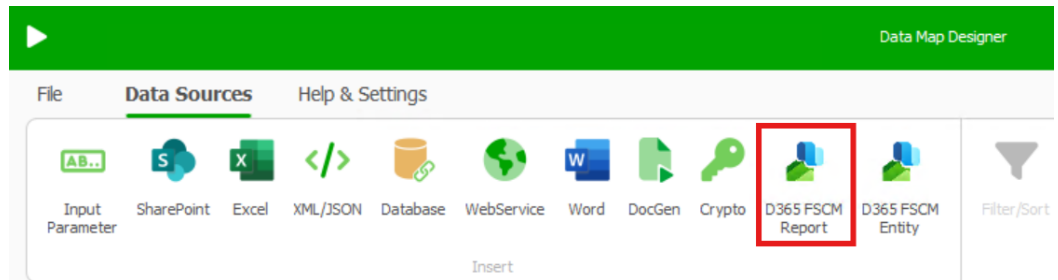
3.2.3 Setup the Data Source

This chapter will describe the basic steps to setup a Data Source as well as the first steps of designing a report. Data Sources are always setup the same way. For each table of the report is a new Data Source needed. In a chapter before a standard Data Map was created and copied into the folder of the reports.

1 Setting up the Data Source

- a. Open the standard Data Map of the template which should be designed

- b. Choose the “D365 FSCM Report” (“Dynamics 365 for Finance and Operations Data Source” or “D365 FO Report” in previous versions)



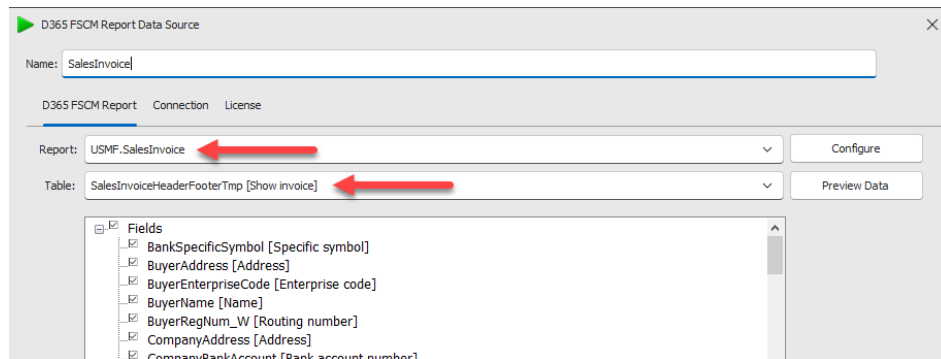
- c. Choose the tab “Connection”. Click on the button with the three dots and choose the fields from the connection file for URL and Username, for the password choose the

Crypto Data Source as illustrated in the picture below. It is recommended to use “Client credentials” while setting up the connection.

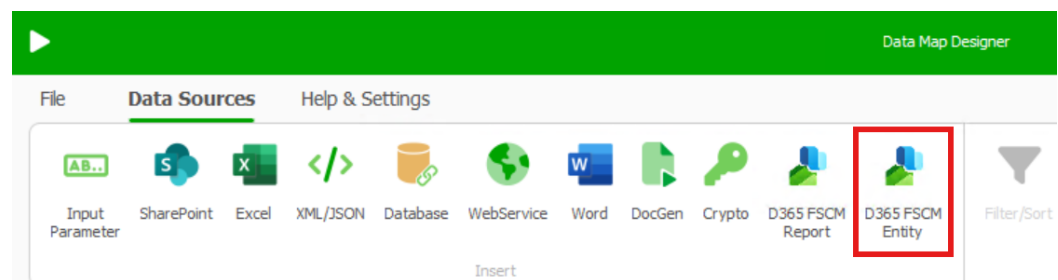
- d. Check the connection by clicking on the button “Connect”, the connected D365 FSCM environment will be displayed at the end of the form.

- e. Click on the tab “D365 FSCM Report” (“D365 FO Report” or “Dynamics 365 for Finance and Operations Data Source” in previous versions) and choose the desired report. Select the needed table and mark all the fields as displayed in the picture below. The fields of the table will be displayed in the box “dox42 Data Fields”, described in the third step.

Note: a report contains often more than one table, e.g. a SalesInvoice has a SalesInvoiceHeader table and SalesInvoiceLines table, for each table is a new Data Source needed.



- 2 Getting always the last transaction ID, if the generate button is clicked (the generate button is described in the chapter below).
 - a. Create an Entity Data Source by clicking on the Data Source “D365 FSCM Entity” (“D365 FO Entity” or “Dynamics 365 for Finance and Operations OData Source” in previous versions)



- b. Insert a name and click on the tab “Connection”, setup the connection like before by the “D365 FSCM Report” data source.
 - c. Search in the entity drop-down menu for the entity “Dox42ReportStorageLastRecordsV3_SF” (Dox42ReportStorageLastRecordsV2_SF)

and Dox42ReportStorageLastRecords_SF entities are obsolete, and their use since the product version 1.4.0 is no longer recommended)

D365 FSCM Entity Data Source

Name: Dox42ReportStorageLastRecordsV3_SF

D365 FSCM Entity Connection License

Entity: Dox42ReportStorageLastRecordsV3_SF Preview Data

Ext. filter: ...

Field List Filter: Clear Show selected only

- d. Setup the fields and filters. Filters should correspond to the report selected in the D365 FSCM Report Data Source to match with the metadata properly. For example, if:

1. Company "USMF", Report "SalesInvoice" (no design):

D365 FSCM Report Data Source

Name: SalesInvoiceHeader

D365 FSCM Report Connection License

Report: USMF.SalesInvoice Configure

Table: SalesInvoiceHeaderFooterTmp [Show invoice] Preview Data

D365 FSCM Entity Data Source

Name: Dox42ReportStorageLastRecordsV3_SF

D365 FSCM Entity Connection License

Entity: Dox42ReportStorageLastRecordsV3_SF Preview Data

Ext. filter: ...

Field List Filter: Clear Show selected only

Enabled	Field Name	Filter	Filter Value	Filter Data Field	Field Type
<input checked="" type="checkbox"/>	ConfigurationId				
<input checked="" type="checkbox"/>	DesignName	=			String
<input checked="" type="checkbox"/>	RefCompanyId	=	USMF		String
<input checked="" type="checkbox"/>	ReportCreatedDateTime				
<input checked="" type="checkbox"/>	ReportCreatedTransactionId				
<input checked="" type="checkbox"/>	ReportName	=	SalesInvoice		String

2. Company "USMF", Report "SalesInvoice", Design "Report":

D365 FSCM Report Data Source

Name: SalesInvoiceHeader

D365 FSCM Report Connection License

Report: USMF.SalesInvoice.Report Configure

Table: SalesInvoiceHeaderFooterTmp [Show invoice] Preview Data

D365 FSCM Entity Data Source

Name: Dox42ReportStorageLastRecordsV3_SF

D365 FSCM Entity Connection License

Entity: Dox42ReportStorageLastRecordsV3_SF Preview Data

Ext. filter: ...

Field List Filter: Clear Show selected only

Enabled	Field Name	Filter	Filter Value	Filter Data Field	Field Type
<input checked="" type="checkbox"/>	ConfigurationId				
<input checked="" type="checkbox"/>	DesignName	=	Report		String
<input checked="" type="checkbox"/>	RefCompanyId	=	USMF		String
<input checked="" type="checkbox"/>	ReportCreatedDateTime				
<input checked="" type="checkbox"/>	ReportCreatedTransactionId				
<input checked="" type="checkbox"/>	ReportName	=	SalesInvoice		String

3. Report "SalesInvoice" (no company and no design):

D365 FSCM Report Data Source

Name: SalesInvoiceHeader

D365 FSCM Report Connection License

Report: SalesInvoice Configure

Table: SalesInvoiceHeaderFooterTmp [Show invoice] Preview Data

D365 FSCM Entity Data Source

Name: Dox42ReportStorageLastRecordsV3_SF

D365 FSCM Entity Connection License

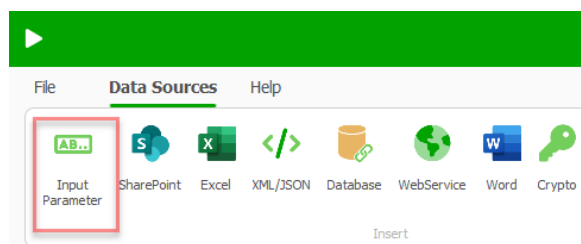
Entity: Dox42ReportStorageLastRecordsV3_SF Preview Data

Ext. filter: ...

Field List Filter: Clear Show selected only

Enabled	Field Name	Filter	Filter Value	Filter Data Field	Field Type
<input checked="" type="checkbox"/>	ConfigurationId				
<input checked="" type="checkbox"/>	DesignName	=			String
<input checked="" type="checkbox"/>	RefCompanyId	=			String
<input checked="" type="checkbox"/>	ReportCreatedDateTime				
<input checked="" type="checkbox"/>	ReportCreatedTransactionId				
<input checked="" type="checkbox"/>	ReportName	=	SalesInvoice		String

e. Click on the button "Input Parameter"

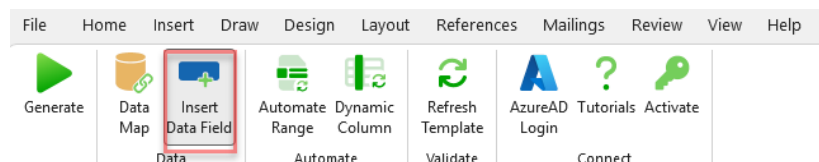


f. Insert a name. Click on the button "Insert Data Field" and choose from the "D365 FSCM Report" Source the field "ReportCreatedTransactionId". The result is displayed in the "Default Value" field.

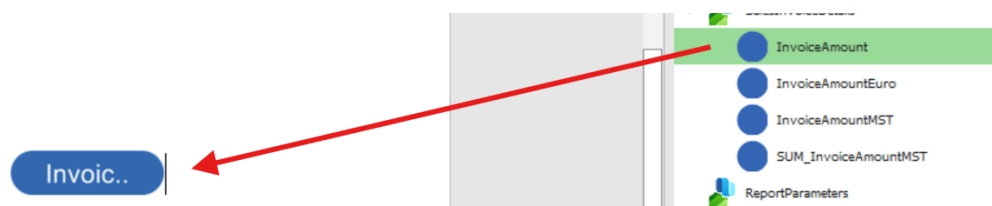
3 Insert placeholders into the template with the button “Insert Data Field”

Those placeholders represent the data fields which were marked in the first step while creating the “D365 FSCM Report” (“Dynamics 365 for Finance and Operations Data Source” or “D365 FO Report” in previous versions).

- Create e.g. a simple table in the template.
- Click on the button “Insert Data Field”, a data box will appear with all the components of the Data Map.



- Choose one field and drag it to the desired place.



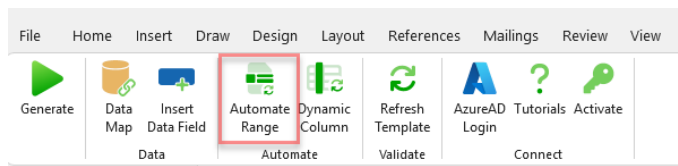
- Select the desired data format for the selected field, further details are described in the “Data formats” chapter.

4 Setting an automatic range to show e.g. invoice lines in a table

- Mark the field with the placeholder, which should be in the range.

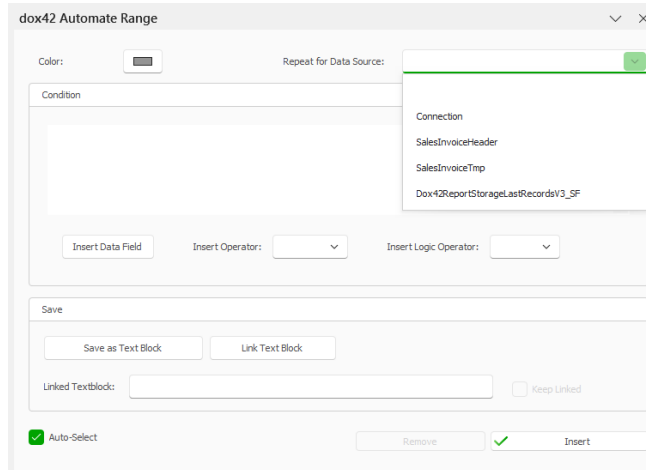
DESCRIPTION	QTY	UNIT	PRICE	TOTAL PRICE
Name LineHeade..	Qty	SalesUnit..	CurrencyS.. SalesPric..	CurrencyS.. LineAmount..

- b. Click on the button “Automate Range”



- c. Select the required data source from the drop-down menu “Repeat for Data Source”

If only one condition is required and no loop with condition, no data source needs to be selected.



- d. Click on the button “Insert Data Field” and choose the field which are required for the condition.

- e. Select an operator from the drop-down menu “Insert Operator”.

If more than one condition is need, it is possible to combine the condition with the operators from the drop-down menu “Insert Logic Operator”.

The picture below is an example for a condition loop in a SalesInvoice template, which has the meaning “as long as the ItemId is not empty, print the next line”.

A finished SalesInvoice template could look like the image below:

- 5 Switch to the D365 FSCM and print the report to the screen.
 - a. Go to the report which should be printed for example the sales invoice
 - b. Mark the sales invoice which should be posted

- c. D365 FSCM will automatically choose the dox42 report, if it is setup and activate in the dox42 parameters.

LOGO **SALES INVOICE**

Cave Wholesales
456 White Road
Abbeville, GA 31001
USA

Invoice number	CIV-00000776
Invoice Date	19/07/2019
Sales Order	000990
Invoice Account	US-004

Invoice

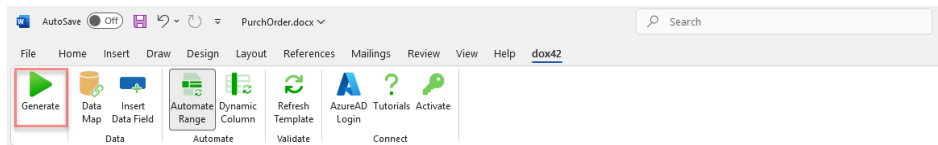
ITEM	DESCRIPTION	QUANTITY	UNIT	SALES PRICE	TOTAL
L0001	MidRangeSpeaker2	1	ea	\$500.00	\$500.00

Net amount	\$500.00
Tax amount	\$20.00
Gross Amount	\$520.00

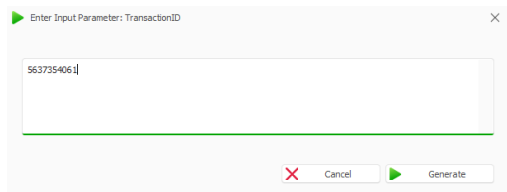
3.2.4 The button “Generate”

Word as many design tools that makes is easy to design a perfectly looking report, but it is necessary that changes are shown as quickly as possible to save time while for example testing a new layout.

Therefore, dox42 provides the generate button, which will demonstrate how the report will look like in D365 FSCM.

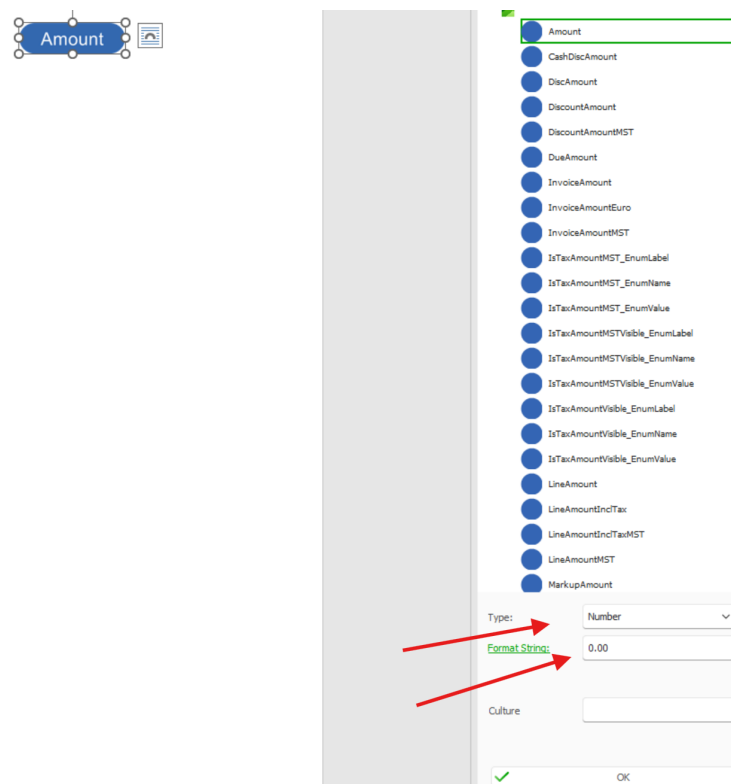


If the generate button was clicked a transaction Id appears, in this case it is the last transaction id because of the setup in the chapter before. The data from the last printed report can be reused, which allows to check changes to the layout with the same data.



3.2.5 Data formats

There are different types and formats you can select for the placeholder. The picture below illustrates where the format of the placeholder is determined.



The “Format String” is colored blue, because it is a link to a website which describes all available data formats.

Define a format

1. Choose the type which the placeholder should have by selecting it from the drop-down menu “Type”
 - a. If the placeholder is a simple text, there is no need for a type

2. Decide in which format the placeholder should be displayed
 - a. Hard-coded like "0.00" or "dd/MM/yyyy"
 - b. Predefined formats like "C", it is used to format a currency field. A detailed description can be found in the link above.

3.2.6 Handling culture formatting based on Report Rendering Culture/ AX_RenderingCultureParameter

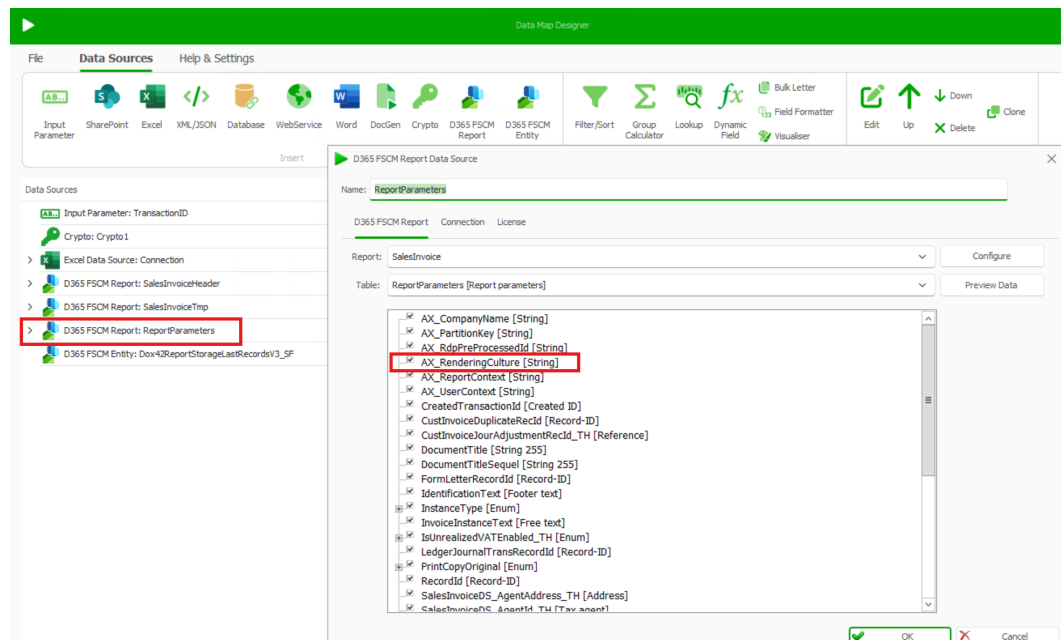
There is a special parameter for different formatting preferences for example the English format with a dot and the German format with a comma, it called "AX_RenderingCulture". Possible values are en-us, de-at,

The rendering culture can be used to format data fields according to the report language. To do so, it is necessary to include the ReportParameter table in the Data Map.

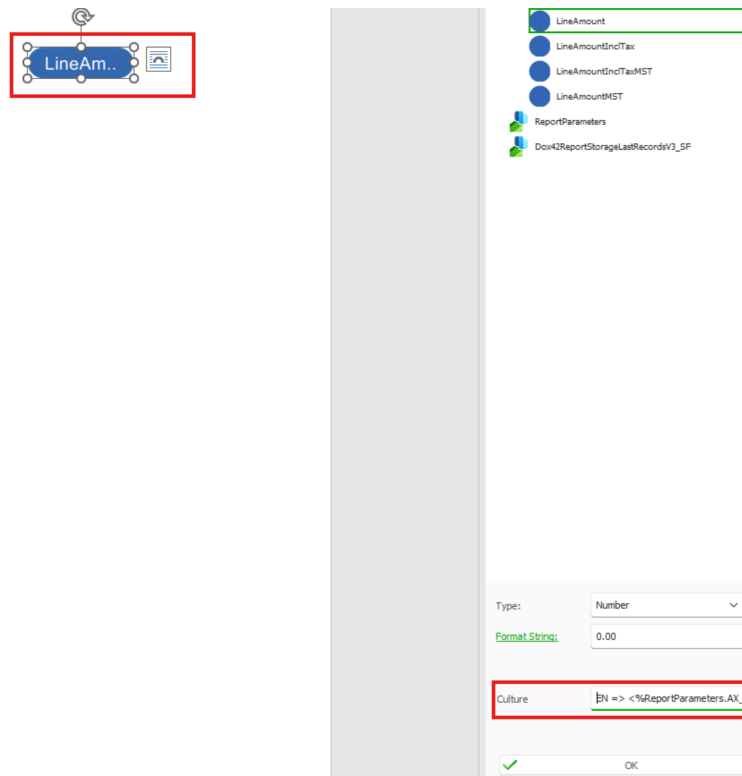
The best way is to clone one of the data sources, because there is no need to fill out the connection setup again.

Clone a Data Source (e.g the SalesInvoice)

- a. Mark the Data Source and click on the button "Clone" (on the right side of the Data Map)
- b. Rename the Data Source and search in the drop-down menu "Table" for the ReportParameter.
- c. Mark the field "AX_RenderingCultureParameter".



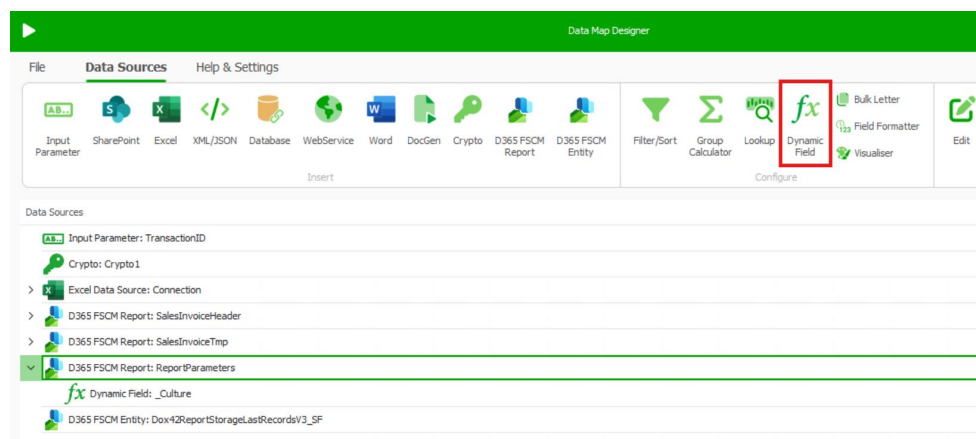
- d. Mark a placeholder with the format "Number" and insert into the field "Culture" the following text: "EN => <%ReportParameters.AX_RenderingCulture%>". The picture below illustrates it.



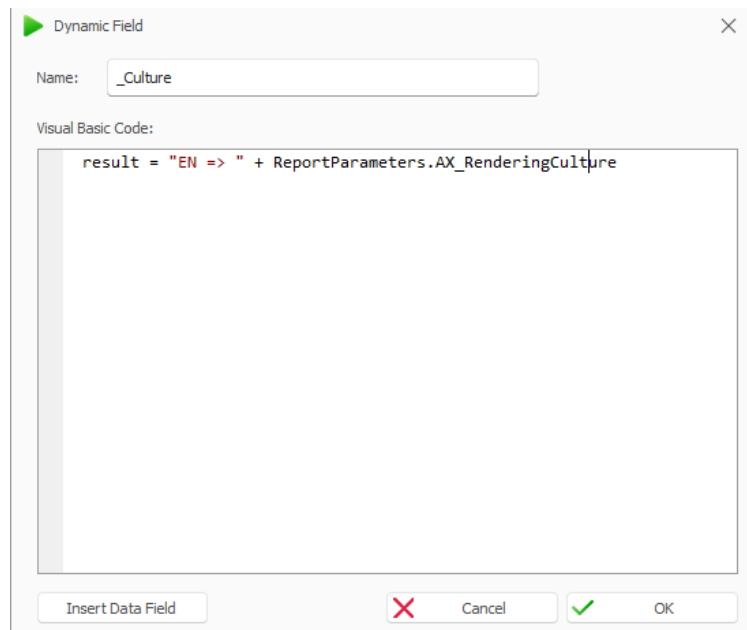
- e. Make sure you click the button “OK”, because only then the parameter gets activated.

The best practice shows that it can be useful to create a separate dynamic field for “Culture” in the data source “ReportParameters” and further use this dynamic field in all other places of a template. Therefore, if you need to make any changes in the format of data fields, you will need to modify only one field.

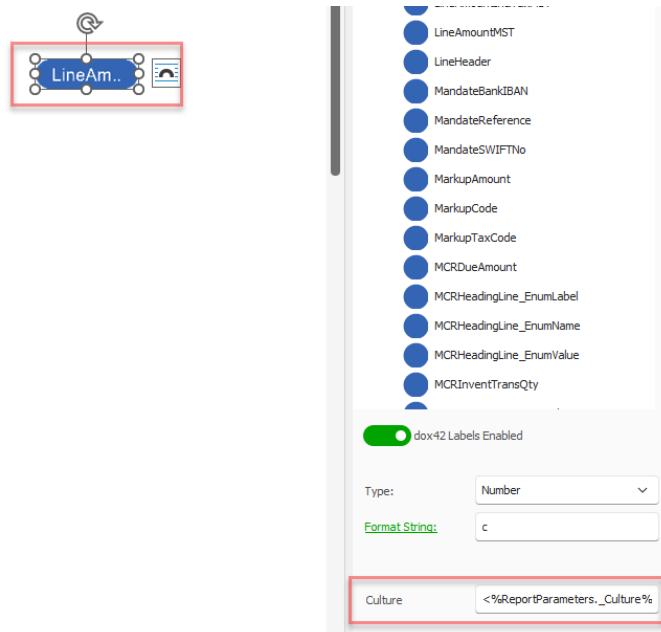
- a. In the Data Map click on the button “Dynamic Field”. How to create a dynamic field is described in the chapter “Advanced dox42 features”.



- b. Write the name of the field and insert into the field “Visual Basic Code” the following text: “result = “EN => ” + ReportParameters.AX_RenderingCulture””. The picture below illustrates it.



- c. Mark a placeholder with the format “Number” and insert into the field “Culture” the following text: “<%ReportParameters._Culture%>”. The picture below illustrates it.



- d. Make sure you click the button “OK”, because only then the parameter gets activated.

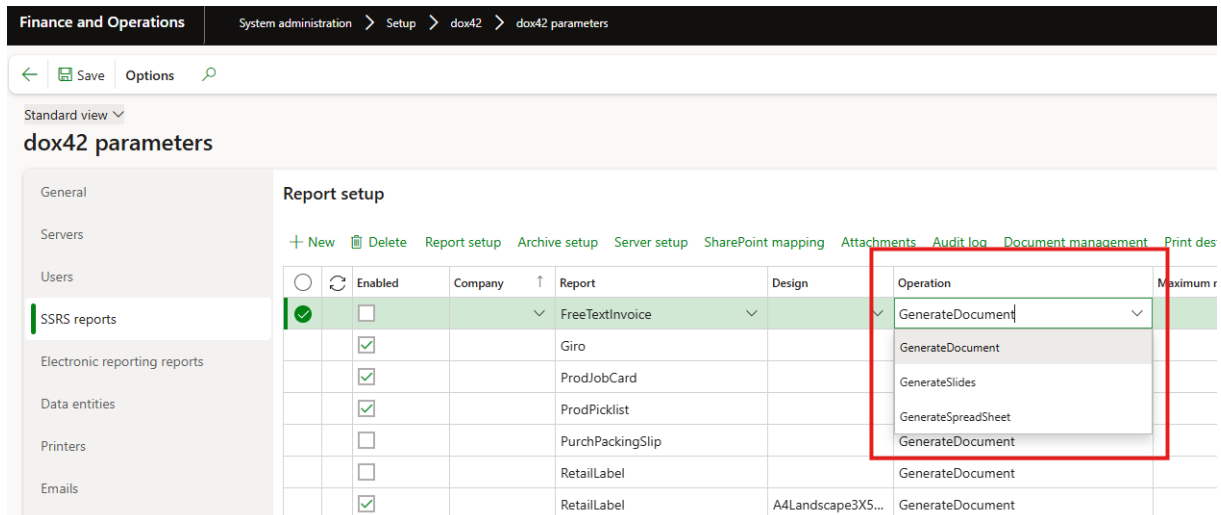
3.3 Creating Word, Excel and PowerPoint templates

There is a possibility to choose an operation while creating a template:

- GenerateDocument – for Word template
- GenerateSlides – for PowerPoint template
- GenerateSpreadSheet – for Excel template

You can setup the operation in “General” tab (System administration > Setup > dox42 > dox42 parameters), “Reports” tab or in “Report setup”. By default, the value is set to “GenerateDocument”.

For the operation “GenerateSpreadSheet” you should put in a “Template name” in Report setup the path to the DataMap of your Excel template.



For every type of a report template, you can add an email body template in a Word format only.

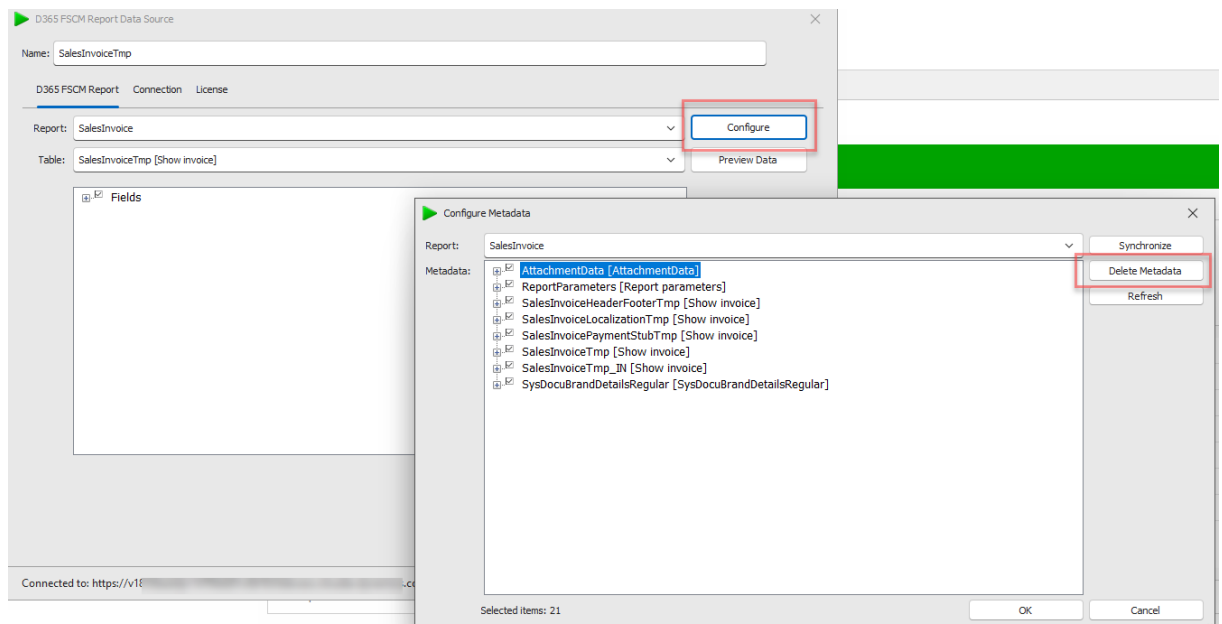
3.4 Handling changes to the DataProvider and transferring the report to production

3.4.1 Handling new adjustments in the DataProvider

If e.g. a new field was added to the DataProvider the following steps are required:

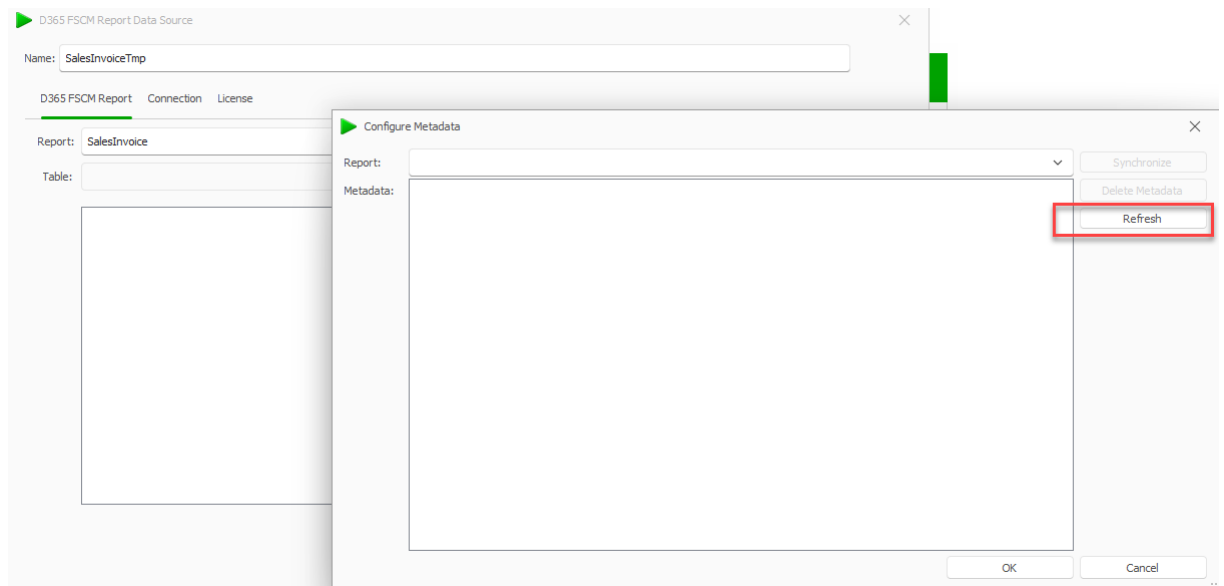
1. Deleting old metadata

The configuration setup of a DataSource in the DataMap contains the button “Delete Metadata”, which will delete the metadata of the report.



2. Creating new metadata

For creating new metadata, the report must be reprinted in the D365 FSCM. After printing the report in the D365 FSCM System, the button “Refresh” must be clicked for refreshing the metadata.

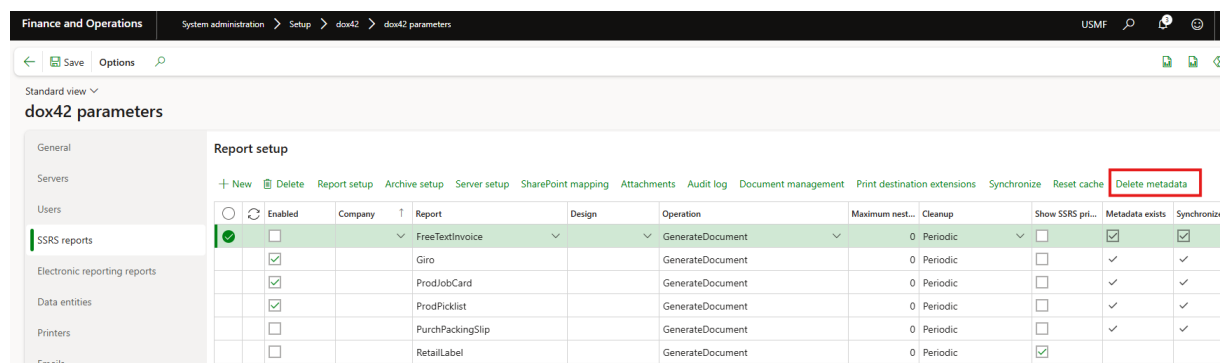


3. The last step is to click the button “Synchronize” (optional) and closing the configure setup.

The new fields or adjustments are now available in the DataProvider.

Alternative variant of deleting metadata is a bottom “Delete metadata” in dox42 parameters in D365.

If you want to refresh the metadata for the report after adding new data source or a new field for it, you need to click the button “Delete metadata” in the dox42 parameters (Tab “Reports”) and then print the report. This button in dox42 parameters is created for the developers and for the maintenance in the scenarios when the metadata changed, and it is needed to be regenerated. For the users it is recommended to delete metadata in a Word template.



3.4.2 Transferring the report from the test environment to the productive environment

For transferring a report from the test environment to the productive environment the following steps are required:

1. Saving the current productive environment DataMap and Word template in an archive (could be a simple folder), to provide a certain kind of traceability.
2. Replace the currently used DataMap and Word template in the productive environment with the new versions from the test environment.
3. Export the needed dox42 setup from the test environment and import it to the productive environment.
 - a. Go to **System administration > Periodic tasks > dox42 > Export dox42 data** in the test environment and run the export of the needed dox42 setup to a file. Important, that the report metadata (metadata is set up in the template) is saved and exported together with the report settings (tab page "Reports" of the dox42 parameters form), therefore the checkbox "Reports" should be set to "Yes" if the report metadata has been changed or newly created. If you need to export only specific parameters to a file, use filters to define export parameters.

Export dox42 data

Parameters

DOX42 PARAMETERS General <input type="radio"/> No Users <input type="radio"/> No Printers <input type="radio"/> No Emails <input type="radio"/> No Custom print destinations <input checked="" type="checkbox"/> Yes Custom print destinations translations <input checked="" type="checkbox"/> Yes Print destination extensions <input checked="" type="checkbox"/> Yes	DOX42 PARAMETERS (SSRS REPORTS) SSRS reports <input checked="" type="checkbox"/> Yes SSRS reports setup <input checked="" type="checkbox"/> Yes SSRS reports archive setup <input checked="" type="checkbox"/> Yes SSRS reports server setup <input checked="" type="checkbox"/> Yes SSRS reports attachment setup <input checked="" type="checkbox"/> Yes SSRS reports audit log setup <input checked="" type="checkbox"/> Yes	SSRS reports document management ... <input checked="" type="checkbox"/> Yes SSRS reports print destination extensi... <input checked="" type="checkbox"/> Yes DOX42 PARAMETERS (ELECTRONIC REPORTING REPORTS) Electronic reporting reports <input checked="" type="checkbox"/> Yes Electronic reporting reports setup <input checked="" type="checkbox"/> Yes Electronic reporting reports archive se... <input checked="" type="checkbox"/> Yes Electronic reporting reports server set... <input checked="" type="checkbox"/> Yes Electronic reporting reports print desti... <input checked="" type="checkbox"/> Yes	DOX42 PARAMETERS (DATA ENTITIES) Data entities <input checked="" type="checkbox"/> Yes Data entities setup <input checked="" type="checkbox"/> Yes Data entities translations <input checked="" type="checkbox"/> Yes Data entities print destination extensi... <input checked="" type="checkbox"/> Yes DOX42 COMPANY PARAMETERS General <input type="radio"/> No MISCELLANEOUS Servers <input checked="" type="checkbox"/> Yes	Email senders <input checked="" type="checkbox"/> Yes Email senders translations <input checked="" type="checkbox"/> Yes SharePoint parameters <input checked="" type="checkbox"/> Yes SharePoint mapping <input checked="" type="checkbox"/> Yes Output actions <input checked="" type="checkbox"/> Yes Custom output actions <input checked="" type="checkbox"/> Yes
---	--	---	---	---

i. dox42 parameters: **System administration > Setup > dox42 > dox42 parameters**

1. Checkbox "General" – tab page "General"
2. Checkbox "Users" – tab page "Users"
3. Checkbox "Printers" – tab page "Printers"
4. Checkbox "Emails" – tab page "Emails"
5. Checkbox "Custom print destinations" – tab page "Custom print destinations"
6. Checkbox "Custom print destinations translations" – tab page "Custom print destinations" - > button "Translations"
7. Checkbox "Print destination extensions" – tab page "Print destination extensions"
8. Checkbox "SharePoint mapping" (checkbox "SharePoint parameters" should be activated)

- a. tab page "Reports" > button "SharePoint mapping"
 - b. tab page "Reports" > button "Report setup" > button "SharePoint mapping"
 - c. tab page "Data entities" > button "SharePoint mapping"
 - d. tab page "Data entities" > button "Data entity setup" > button "SharePoint mapping"
- ii. dox42 parameters (SRSS reports): **System administration > Setup > dox42 > dox42 parameters**
 1. Checkbox "SRSS Reports" – tab page "Reports"
 2. Checkbox "SRSS Reports setup" – tab page "SRSS Reports" > button "Report setup"
 3. Checkbox "SRSS Reports archive setup" – tab page "SRSS Reports" > button "Archive setup"
 4. Checkbox "SRSS Reports server setup" – tab page "SRSS Reports" > button "Server setup"
 5. Checkbox "SRSS Reports attachment setup" – tab page "SRSS Reports" > button "Attachments"
 6. Checkbox "SRSS Reports audit log setup" – tab page "SRSS Reports" > button "Audit log"
 7. Checkbox "SRSS Reports Document management" – tab page "SRSS Reports" > button "Document management"
 8. Checkbox "SRSS Reports print destination extensions setup" – tab page "SRSS Reports" > button "Print destination extensions"
- iii. dox42 parameters (Electronic reporting reports): **System administration > Setup > dox42 > dox42 parameters**
 1. Checkbox "Electronic reporting reports" – tab page "Electronic reporting reports"
 2. Checkbox "Electronic reporting reports setup" – tab page "Electronic reporting reports" > button "Report setup"
 3. Checkbox "Electronic reporting reports archive setup" – tab page "Electronic reporting reports" > button "Archive setup"
 4. Checkbox "Electronic reporting reports server setup" – tab page "Electronic reporting reports" > button "Server setup"
 5. Checkbox "Electronic reporting reports print destination extensions" – tab page "Electronic reporting reports" > button "print destination extensions"
- iv. dox42 parameters (Data entities): **System administration > Setup > dox42 > dox42 parameters**
 1. Checkbox "Data entities" – tab page "Data entities"
 2. Checkbox "Data entities setup" – tab page "Data entities" > button "Data entity setup"

3. Checkbox "Data entities translations" – tab page "Data entities" > button "Translations"
4. Checkbox "Data entities print destination extensions" – tab page "Data entities" > button "Print destination extensions"
- v. dox42 company parameters: **System administration > Setup > dox42 > dox42 company parameters**
 1. Checkbox "General" – tab page "General"
- vi. dox42 servers: **System administration > Setup > dox42 > dox42 servers**
 1. Checkbox "Servers" – form data
- vii. dox42 email senders: **System administration > Setup > dox42 > dox42 email senders**
 1. Checkbox "Email senders" – form data
 2. Checkbox "Email senders translations" – button "Translations"
- viii. dox42 SharePoint sites: **System administration > Setup > dox42 > dox42 SharePoint sites**
 1. Checkbox "SharePoint parameters" – form data
- ix. Output actions: **System administration > Setup > dox42 > dox42 output actions**
 1. Checkbox "output actions" – form data
- x. Custom output actions: **System administration > Setup > dox42 > dox42 custom output actions**
 1. Checkbox "custom output actions" – form data
- b. Go to **System administration > Periodic tasks > dox42 > Import dox42 data** in the productive environment and run the import of the previously exported file.

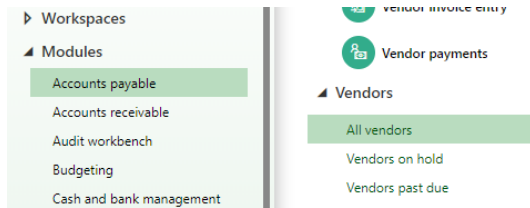
Note: During this process the report cannot be printed in the productive system.

3.5 Create your first Data Entity based (OData) report

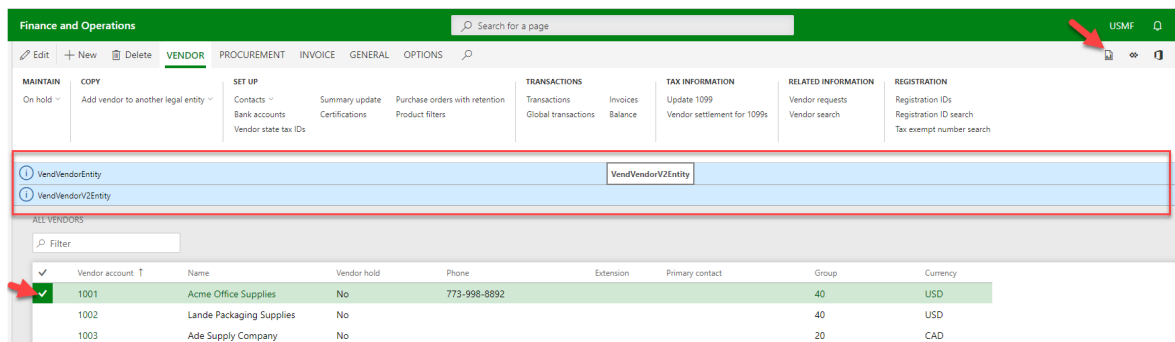
The difference between a "D365 FSCM report" based report and a "D365 FSCM entity" report is that the latter is built up by data entities retrieved via OData. Setting up an "D365 FSCM entity" based report is like setting up a "normal" report. A "Data Source" report can use all data which is sent to SSRS. If you require additional information you can extend the data source. However, you can also use an "D365 FSCM entity" data source to add information without changing the SSRS data provider. It is possible to mix data from "D365 FSCM entity" (OData) and SSRS data sources and use them in one template. On the other hand, for some reports it is not required to create the SSRS data source, you can just use a data entity to create a report without SSRS data provider.

Setup the “D365 FSCM entity” (OData) report in D365 FSCM

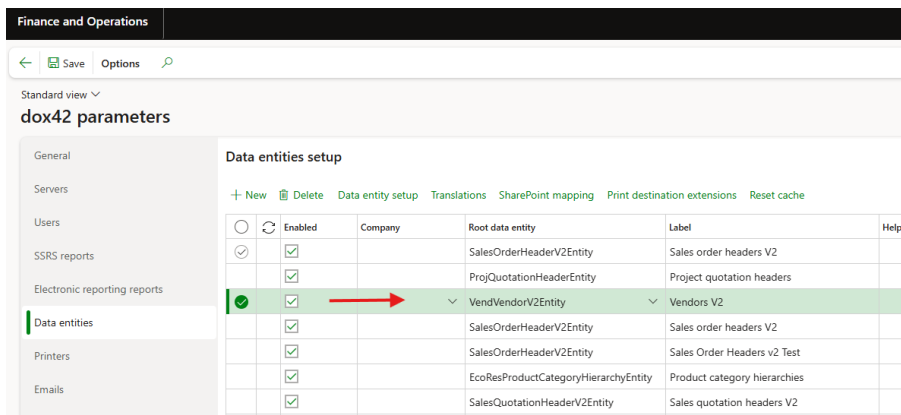
1. Switch to the desired information like “All vendors”



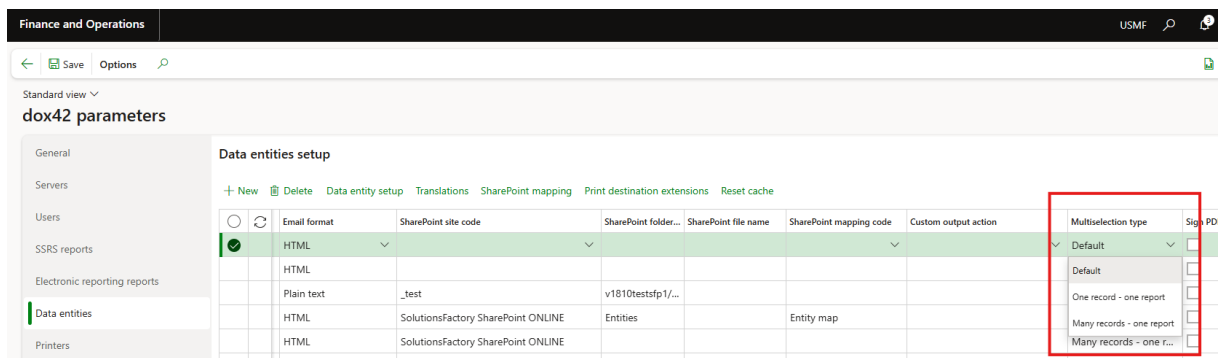
2. Mark one vendor and click the button “dox42” (on the right side), shown on the picture below. The name of the entity will be shown also illustrated on the picture below.



3. Switch to the dox42 parameters
4. Click on the tab “Data entities”
5. Choose the Root data entity (which was shown before)



6. Choose the desired report behavior in the field “Multiselection type”:



- a. “Default” – global setup applied.

Finance and Operations

Standard view

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Global parameters

TEMPLATES

Operation

GenerateDocument

REPORT ARCHIVE

Enable asynchronous archiving

Yes

DATA ENTITIES

Multiselection type

Many records - one report

DOCUMENT ROUTING

Document routing mode

TIFF to EMF

EMAILS

Email format

HTML

- b. "One record – one report" – one report is printed for each selected record.
- c. "Many records – one report" – one report is printed for all selected records.

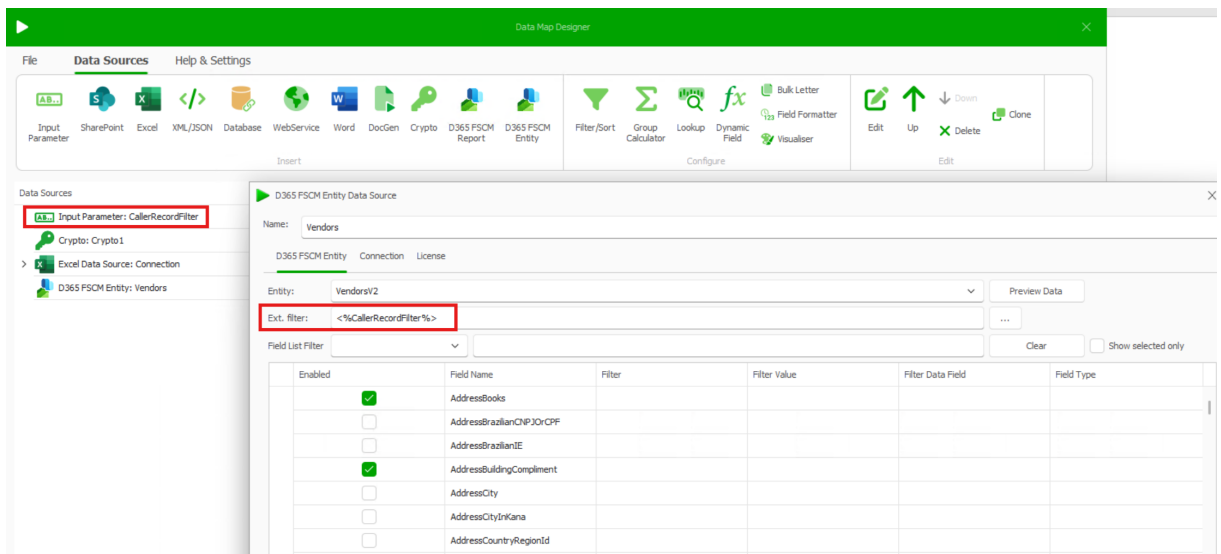
When using this option, the entity key data of the selected records is packed into the html request string used to call dox42. This is a limiting factor in the number of records that can be selected and sent - especially if the key data for each record is large in size.

7. Click on the button "Data entity setup" and insert the path to the template.

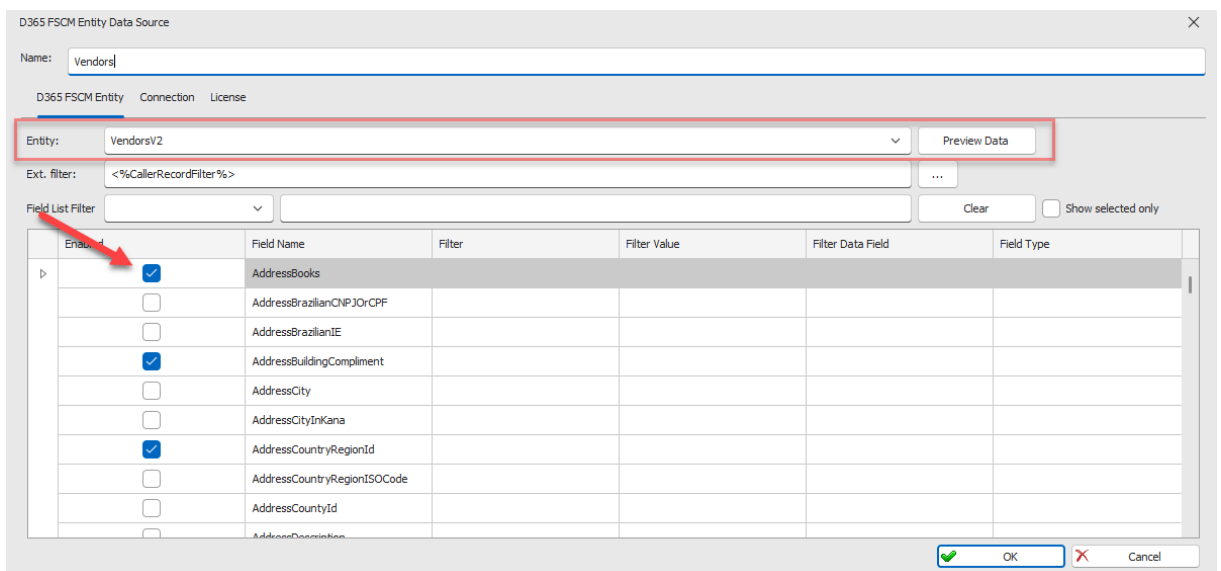
Building a D365 FSCM Entity vendor factsheet

1. Create a new Word template and insert into it the Data Map a "D365 FSCM Entity" data source ("Dynamics 365 for Finance and Operations OData Source" or "D365 FO Entity" in previous versions).

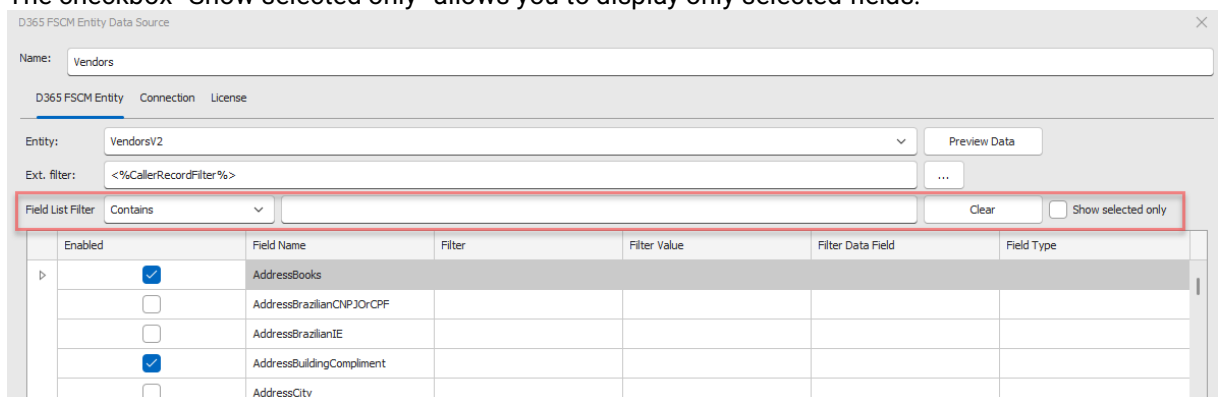
2. Insert a filter for the ODataSource.



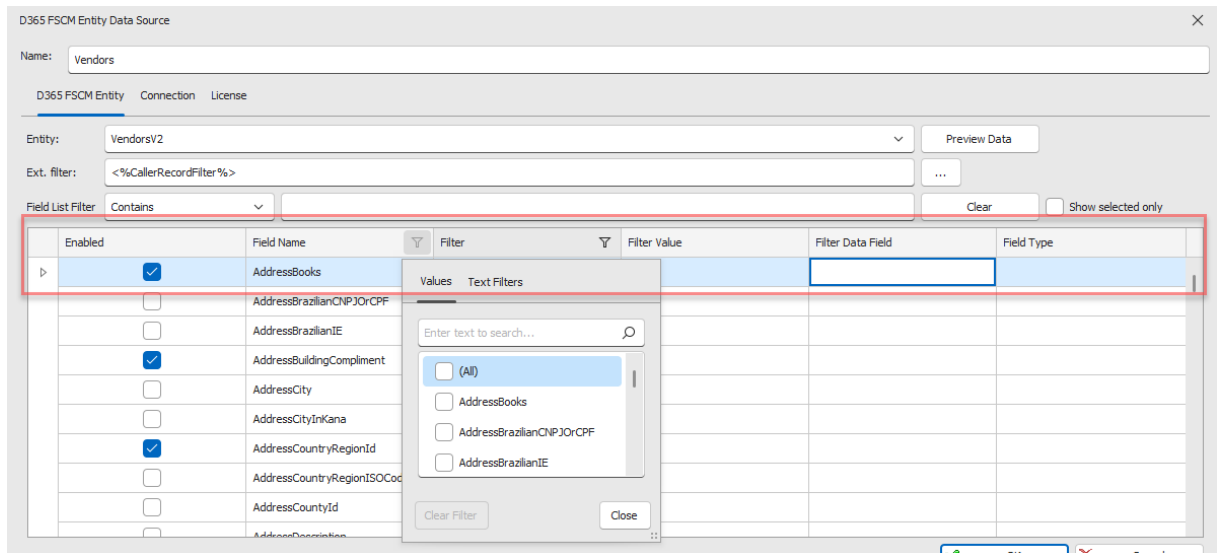
3. Select from the drop-down menu the entity "Vendor2", in the D365 FSCM Entity data source and mark the fields which are required for the report.



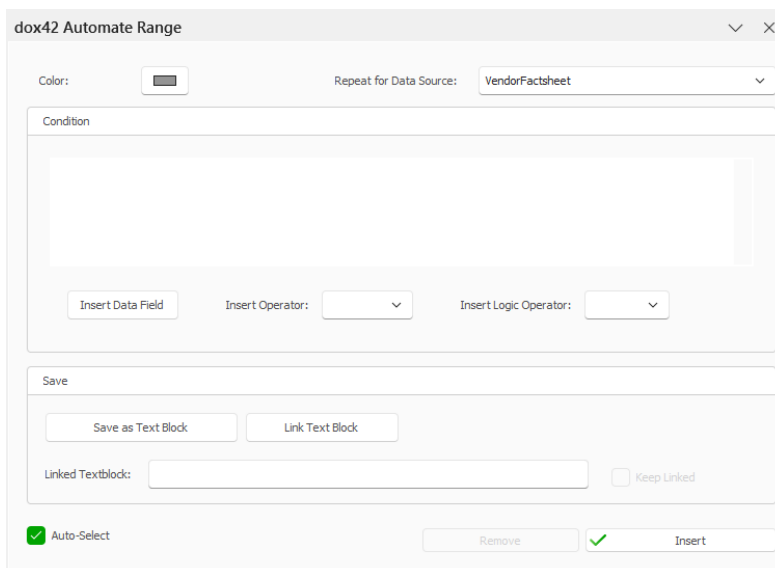
There is special Field list filter which allows you to filter the fields in your Entity data source. You can clear all the text in the text field by clicking the button "Clear". The checkbox "Show selected only" allows you to display only selected fields.



You can also use filters on the grid:



- Design the template and define a loop like in the picture below.



Complete the template by inserting all required placeholders.

Supplier Master Data

¶

This supplier master data sheet confirms legally-binding information such as address, bank and tax master data of the supplier. ¶

Contact address for master data management: VendorOrg. ¶

¶

Your vendor number (with us): → VendorAcc. → ¶
 Company: → VendorOrg. ¶
 Address: → AddressSt. ¶
 → AddressCl. , AddressZl. ¶
 → AddressCo. ¶
 E-Mail: → PrimaryEm. ¶
 Telephone: → PrimaryPh. ¶
 ¶

In case of questions concerning this supplier master data sheet please contact us under the above-mentioned contact data. ¶

Address¶		¶
Street¶	AddressSt. ¶	¶
Location¶	AddressCl. ¶	¶
Zip code¶	AddressZl. ¶	¶
Country¶	AddressCo. ¶	¶
¶		¶
Banking information¶		¶
Currency¶	CurrencyC. ¶	¶
Payment terms¶	DefaultPa. ¶	¶
Method of payment¶	DefaultVe. ¶	¶
Discount¶	CashDisco. ¶	¶

- Call the report from the D365 FSCM environment, the picture below illustrates it.

The screenshot shows the Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Dynamics 365', 'Finance and Operations', and 'Accounts payable > Vendors > All vendors'. The 'VENDOR' tab is selected, and the 'DOX42 TEMPLATES' dropdown menu is open, showing 'Vendors' as an option. A red arrow points to the 'Vendors' option in the dropdown. Below the dropdown, a table of vendors is displayed with columns: Vendor account, Name, Vendor hold, Phone, Extension, Primary contact, Group, and Currency. The vendor 'JULIAF' is highlighted with a blue row and a red arrow pointing to its 'Vendor account' field.

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency
1001	Acme Office Supplies	No	773-998-8892			40	USD
1002	Lande Packaging Supplies	No				40	USD
1003	Ade Supply Company	No				20	CAD
104	Best Supplier - Europe	No				10	EUR
AirCarrier	Air Cargo Carrier	No				40	USD
CN-001	Contoso Asia	No	80123] 4567 8901			40	CNY
CompanyCC	CompanyCC	No				40	USD
JP-001	Contoso Chemicals Japan	No				10	JPY
JULIAF	Julia Funderburk	No	425-555-5053	5053		40	USD
LTL Vendor	LTL Vendor	No				40	USD
TIME	Time Vendor	No				40	USD

For entity-based reports, the dox42 consumer security role is sufficient.

4 Maintain print destinations in D365 FSCM

Seamless integration – Regular Report, Data Entity Based report

4.1 Configure report destinations

If e.g. a sales invoice is posted there is the possibility to select different print destinations, by clicking on the button “Printer setup” as displayed in the picture below.

Posting invoice

Arrange Select **Printer setup** ▼

Parameters

PARAMETER

Quantity

All

Posting

No

COMPLIANCE DOCUMENTS

Prevent sales pack slip/invoice posting

No

Print product safety data sheet

No

PRINT OPTIONS

Print

Current

Print invoice

Yes

Print destination settings

dox42

Save in print archive?

No

Print medium

Screen

Screen

Printer

File

Email

File server

SharePoint

The behavior of the different print medium options is described below.

4.1.1 Screen

The report will be printed on the screen. This option will always be selected, if no other setup is done.

4.1.2 Printer

This option sends the document to the printer if the following printer setup was performed. As a prerequisite for using physical printers, the Document Routing Agent (DRA) is required. The setup is documented on a Microsoft docs site.

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/analytics/install-document-routing-agent>

Additional steps to setup the document routing for dox42

- Setup the document routing mode:
 - **PDF** – the system will generate a pdf document on the dox42 server and send it to the document routing agent (in this case the DRA capabilities can be limited, for example the DRA cannot be used as a service)
 - **PDF V2** – the same as PDF, but the system does not send separate PDF files to a printer for each document copy if number of copies is greater than one, it sends one PDF with all requested document copies in it. For example, it might be helpful in case of printing labels to print the label and its copies in one printing job.
 - **TIFF to EMF** – the system will generate a tiff document on the dox42 server, then convert it to the emf format in D365 F & SCM and send the emf to the document routing agent.
 - **EMF (recommended)** – the system will generate a document in the emf format on the dox42 server and send it to the document routing agent.

The screenshot displays the 'dox42 parameters' configuration page in Dynamics 365. The breadcrumb trail at the top indicates the path: Finance and Operations > System administration > Setup > dox42 > dox42 parameters. The left sidebar shows a navigation menu with 'General' selected. The main content area is titled 'dox42 parameters' and contains several sections: 'Global parameters', 'TEMPLATES' (with 'GenerateDocument' selected), 'REPORT ARCHIVE' (with 'Enable asynchronous archiving' toggled on), 'DATA ENTITIES' (with 'Multiselection type' set to 'Many records - one report'), and 'DOCUMENT ROUTING'. The 'DOCUMENT ROUTING' section is highlighted with a red box, showing 'Document routing mode' set to 'TIFF to EMF'.

- Register the printer in the tab "Printers", which were defined during the setup of the document routing agent:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Printer setup

+ New Delete

	Company	Printer name	Destination	Document Routing Agent active
<input type="radio"/>		P001SFA01	P001SFA01	<input type="checkbox"/>
	USMF			✓
	USMF			✓
	USMF			✓

- Select the printer as the Print medium and then select the desired printer from the drop-down menu "Printer name".

Print destination settings

dox42

Save in print archive?
No ☐

Print medium
Printer

Screen

Printer

File

Email

File server

Print destination settings

dox42

Save in print archive?
No ☐

Print medium
Printer

Printer name
P001SFA01

P001SFA01

1

4.1.3 File

If this option is selected, the report will be downloaded in the predefined format. Select “File” as print medium and enter a name as well as a format.

Print destination settings

dox42

Save in print archive?

☐ No

Print medium

File

Name

NameFile

File format

PDF

PDF

Word 97-2003

HTML

XML

TXT

Excel 97-2003

CSV

Word

Excel

4.1.4 E-Mail

D365 FSCM provides the feature to send reports via email. If this option was chosen a window like in the picture below appears.

Print destination settings

dox42

Save in print archive?

No ☒

Print medium

Email

To

Edit

Cc

Edit

Bcc

Edit

Subject

File format

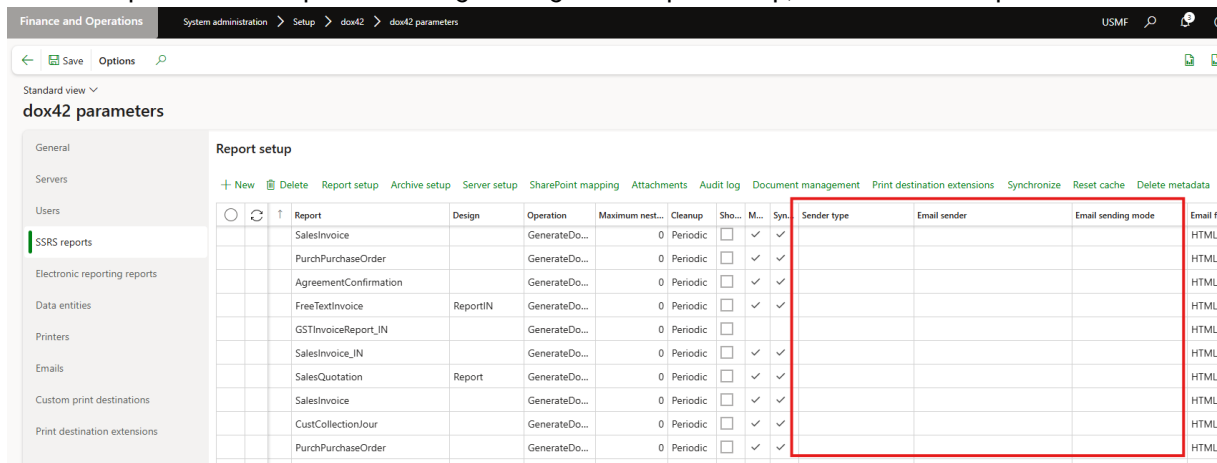
PDF

How to setup the email parameters is explained this section. Switch to the dox42 parameters.

Module “System administration” > “Setup” > “dox42” > “dox42 parameters” > tab “Reports”

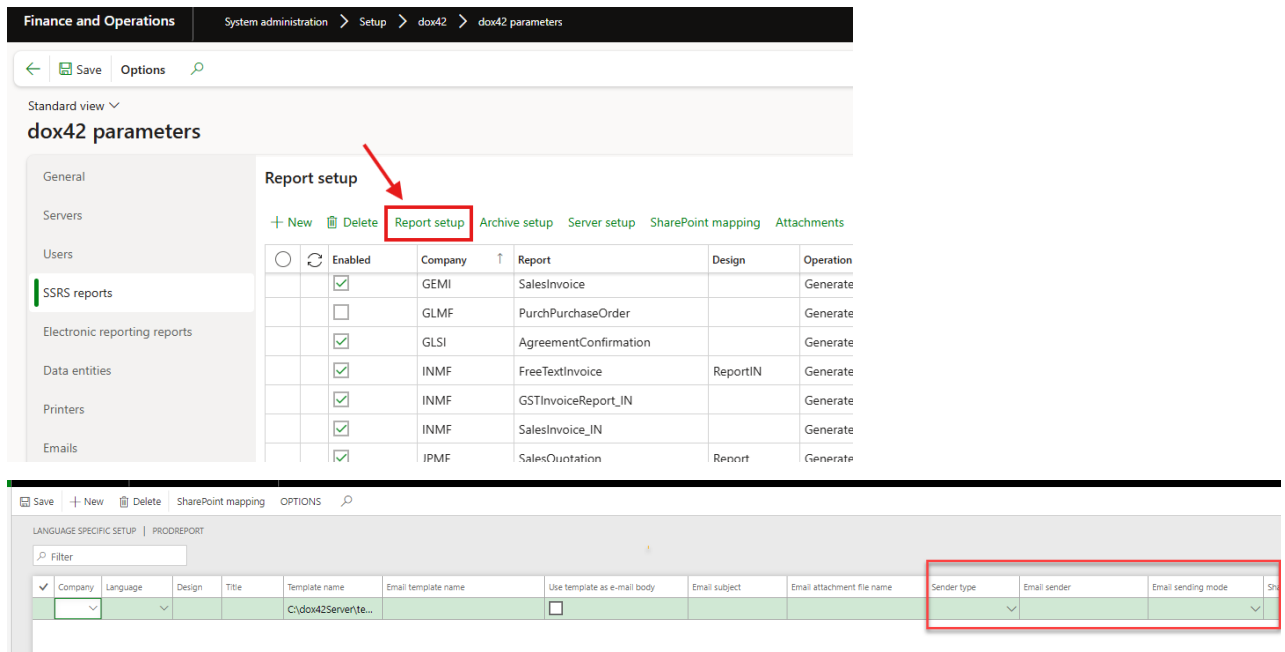
There are two ways to setup emailing parameters for a report.

The first option is to setup the emailing in the general report setup, illustrated in the picture below.



Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sender type	Email sender	Email sending mode	Email f
SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
AgreementConfirmation		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
FreeTextInvoice	ReportIN	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
GSTInvoiceReport_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
SalesInvoice_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
SalesQuotation	Report	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
CustCollectionJour		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML

The second option is to setup the sending of emails in the report specific setup. The form of the specific report setup can be accessed by marking a report and clicking on the button "Report setup", illustrated on the picture below.



Report setup

[+ New](#) [Delete](#) [Report setup](#) [Archive setup](#) [Server setup](#) [SharePoint mapping](#) [Attachments](#)

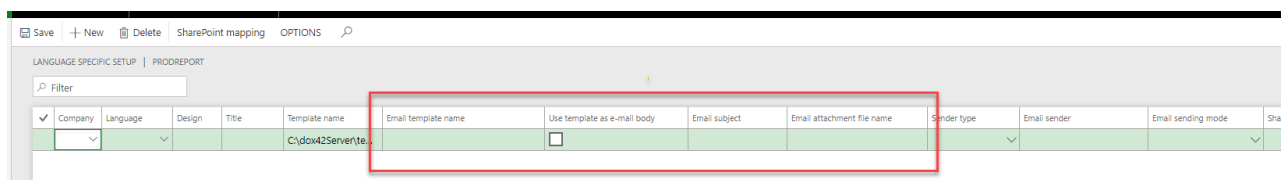
Enabled	Company	Report	Design	Operation
<input checked="" type="checkbox"/>	GEMI	SalesInvoice		Generate
<input type="checkbox"/>	GLMF	PurchPurchaseOrder		Generate
<input checked="" type="checkbox"/>	GLSI	AgreementConfirmation		Generate
<input checked="" type="checkbox"/>	INMF	FreeTextInvoice	ReportIN	Generate
<input checked="" type="checkbox"/>	INMF	GSTInvoiceReport_IN		Generate
<input checked="" type="checkbox"/>	INMF	SalesInvoice_IN		Generate
<input checked="" type="checkbox"/>	IPMF	SalesQuotation	Report	Generate

LANGUAGE SPECIFIC SETUP | PROOREPORT

[Save](#) [+ New](#) [Delete](#) [SharePoint mapping](#) [OPTIONS](#)

Company	Language	Design	Title	Template name	Email template name	Use template as e-mail body	Email subject	Email attachment file name	Sender type	Email sender	Email sending mode	Sh
<input checked="" type="checkbox"/>				C:\dox42Server\te...		<input type="checkbox"/>						

The difference between the two ways of setting up the emailing is that in the general report setup it is not possible to insert a "Email template", "Email subject" or an "Email attachment file". Those fields are only available in the specific report setup (displayed in the picture below).



LANGUAGE SPECIFIC SETUP | PROOREPORT

[Save](#) [+ New](#) [Delete](#) [SharePoint mapping](#) [OPTIONS](#)

Company	Language	Design	Title	Template name	Email template name	Use template as e-mail body	Email subject	Email attachment file name	Sender type	Email sender	Email sending mode	Sh
<input checked="" type="checkbox"/>				C:\dox42Server\te...		<input type="checkbox"/>						

The different setups of the fields "Sender type", "Email sender" and "Email sending mode" are explained in this section. It does not matter if the setup of those fields is in the general report setup area or in the specific report setup area.

The field "Sender type"

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view

dox42 parameters

General | Report setup

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Print destination extensions Synchronization Rest

Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Sm...	Sender type	Email sende
<input checked="" type="checkbox"/>	GEMI	SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	GLMF	PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	GLSI	AgreementConfirmation		Generat...	0	Per...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed	
<input checked="" type="checkbox"/>	INMF	FreeTextInvoice	ReportIN	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Current user	
<input checked="" type="checkbox"/>	INMF	GSTInvoiceReport_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	JPMF	SalesQuotation	Report	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	RUMF	SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SVAA	CustCollectionJour		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

There are two types available "Fixed" and "Current user". If the "fixed" option was selected, then a fixed email must be selected in the field "Email sender". The available email addresses are registered in the "dox42 email senders". How an email address is registered in the "dox42 email senders" is illustrated in the following screenshots.

Module "System administration" > "Setup" > "dox42 email senders"

Dynamics 365 | Finance and Operations | System administration > Setup > dox42 > dox42

Expand all Collapse all

Workspaces

Users

Security

Workflow

Inquiries

Setup

License configuration

Server configuration

Batch group

Active periods for batch jobs

System job parameters

Entity store

PowerBI.com configuration

Deploy Power BI files

Configure performance tool

System parameters

Database log setup

Client performance options

Personalization

Office app parameters

Configure cross-company data sharing

Azure Active Directory applications

Key Vault parameters

B2B Invitation Configuration

Custom fields

Alert rules

Refresh elements

Integration configuration

Data cache

Email

dox42

dox42 email senders

dox42 SharePoint sites

Periodic tasks

System administration

With a simple click on the button "+New" it is possible to register a new email address.

Dynamics 365 | Finance and Operations | System administration > Setup > dox42 > dox42

Save + New Delete Translations OPTIONS

DOX42 EMAIL SENDERS

Filter


Email	Name	Description
max.mustermann@muster.at	Max Mustermann	

This email address will be used as sender.















If the “current” option was selected the email of the currently logged in user will be used.

The field “Email sender”

The field “Email sender” will only be used, if the field “Sender type” has the value “Fixed”.

Standard view 

dox42 parameters

General		Report setup													
		            													
		Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sender type	Email sender	Email sinc	
SSRS reports		<input checked="" type="checkbox"/>	GEMI	SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Electronic reporting reports		<input type="checkbox"/>	GLMF	PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Data entities		<input checked="" type="checkbox"/>	GLSI	AgreementConfirmation		Generat...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed	<div><div>Email</div><div>berta.rater@...</div></div>		
Printers		<input checked="" type="checkbox"/>	INMF	FreeTextInvoice	ReportIN	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Emails		<input checked="" type="checkbox"/>	INMF	GSTInvoiceReport_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Custom print destinations		<input checked="" type="checkbox"/>	JPMF	SalesQuotation	Report	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Print destination extensions		<input checked="" type="checkbox"/>	RUMF	SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
		<input checked="" type="checkbox"/>	SYAA	CustCollectionJour		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
		<input type="checkbox"/>	SYAA	PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
		<input checked="" type="checkbox"/>	SYAA	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

The field “Email sending mode”

The field “Email sending mode” defines which of the setups is used for sending the email. In order to decide which value should be set in the field “Email sending mode”, it is necessary to know how each sending mode behaves. There are three sending modes/transmitter types:

- EML – A file is downloaded in EML Format, which can then be sent via email.
- SMTP – just sends the email
- Exchange – just sends the email

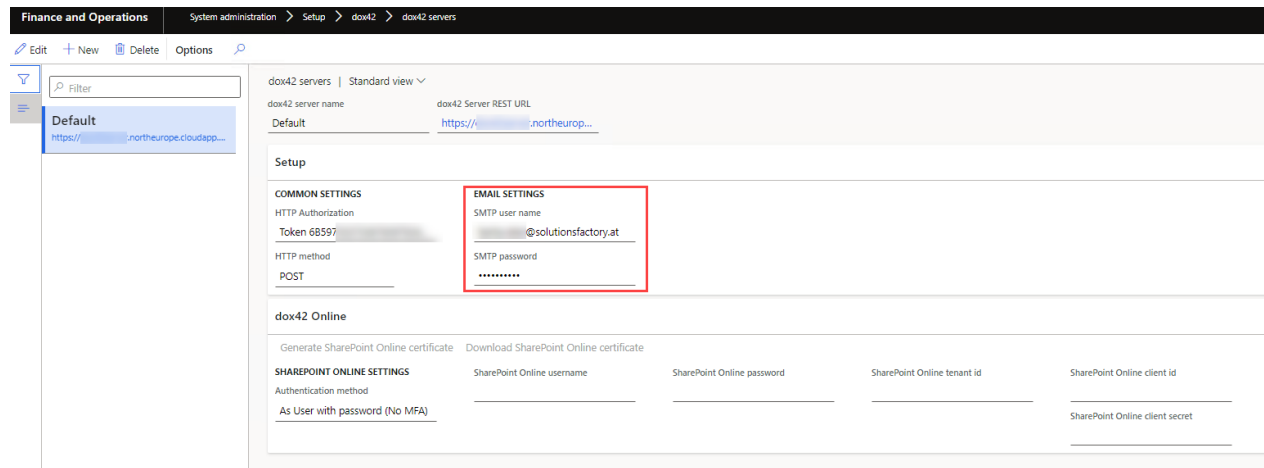
The options for the field “Email sending mode” are:

- dox42 Server
- D365 Server
- D365 User

The “**dox42 Server**” uses SMTP to send emails, the setup for SMTP parameters are on the dox42 parameters. How to get to the dox42 parameters is illustrated below.

“System administration” > “Setup” > “dox42” > “dox42 servers”

Insert the email address in the field “SMTP user name” and insert the password in the field “SMTP password” as displayed in the image below.



Finance and Operations | System administration > Setup > dox42 > dox42 servers

dox42 servers | Standard view

dox42 server name: Default | dox42 Server REST URL: https://...northeurop...

Setup

COMMON SETTINGS

HTTP Authorization: Token 68597

HTTP method: POST

EMAIL SETTINGS

SMTP user name: @solutionsfactory.at

SMTP password: *****

dox42 Online

Generate SharePoint Online certificate | Download SharePoint Online certificate

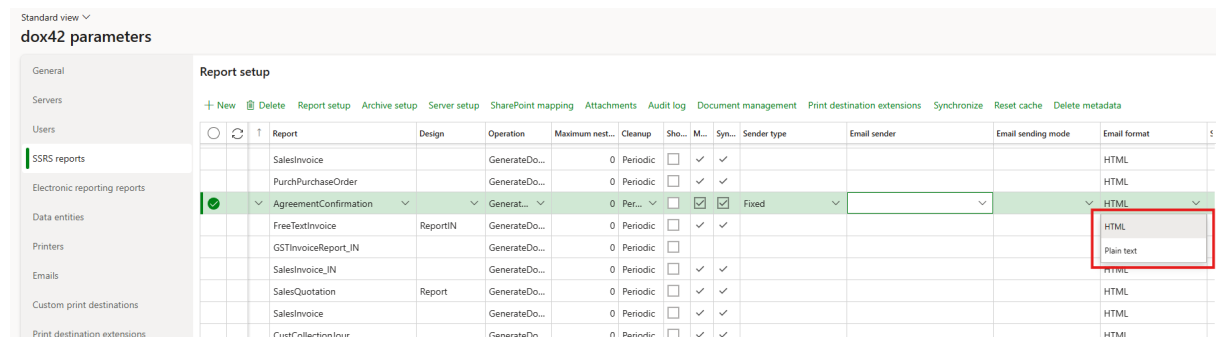
SHAREPOINT ONLINE SETTINGS

Authentication method: As User with password (No MFA)

SharePoint Online username: | SharePoint Online password: | SharePoint Online tenant id: | SharePoint Online client id: | SharePoint Online client secret: |

If the option “**D365 Server**” is chosen, the D365 FSCM uses the setup which is defined in the “Email parameters”.

There are 2 available options for “Email format” of your email body- HTML and Plain text. This setup is available on the General level of dox42 parameters, “SSRS Reports”, “Data entities” levels as well as “Report setup” and “Data entity setup” tabs.



Standard view

dox42 parameters

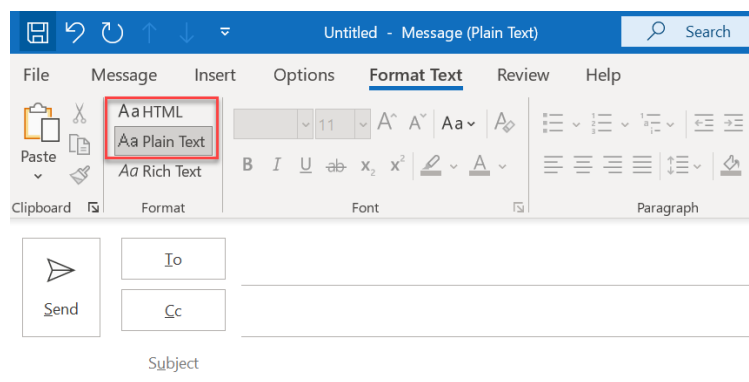
General | Servers | Users | SSRS reports | Electronic reporting reports | Data entities | Printers | Emails | Custom print destinations | Print destination extensions

Report setup

+ New | Delete | Report setup | Archive setup | Server setup | SharePoint mapping | Attachments | Audit log | Document management | Print destination extensions | Synchronize | Reset cache | Delete metadata

Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sender type	Email sender	Email sending mode	Email format
SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
PurchPurchaseOrder		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
AgreementConfirmation		Generat...	0	Per...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed			HTML
FreeTextInvoice	ReportIN	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
GSTInvoiceReport_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Plain text
SalesInvoice_IN		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
SalesQuotation	Report	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML
CustCollection/our		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				HTML

So the Format Test of the email you send will be either “HTML” or “Plain Text”.



Untitled - Message (Plain Text)

File | Message | Insert | Options | Format Text | Review | Help

Paste | Aa HTML | Aa Plain Text | Aa Rich Text

Clipboard | Format | Font | Paragraph

Send | I/O | Cc | Subject

Dox42 audit log (System administration – Periodic tasks – dox42 – dox42 audit log) shows the email format for every printed report.

Finance and Operations | System administration > Periodic tasks > dox42 > dox42 Audit log

Log details | Parent log | Child log | Download data | Retry request | Options

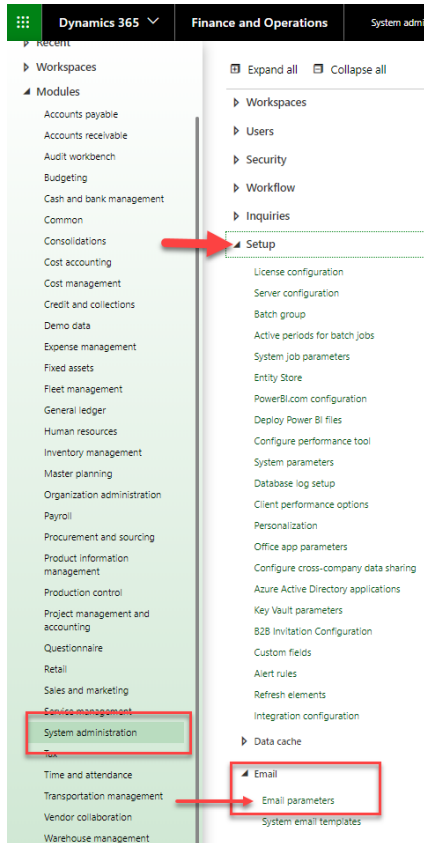
Standard view

dox42 Audit log

Filter: [] Log type: All Print medium: Email

	Cc	Bcc	Email subject	Email operation	Email template name	Email attachment file name	Email format
				GenerateDocument			HTML
				GenerateDocument			HTML
ill.kimenko@solutionsfact...			dox42 integration framework (te...	GenerateDocument			HTML

The form of the “Email parameters” is in the module “System administration” > “Setup” > “Email” > “Email parameters”, illustrated in the picture below.



There are two options available “Exchange” and “SMTP”, displayed in the picture below.

Email parameters

Email providers

General

Batch email provider: Exchange (selected) | Attachment size limit (MB): 10

Email provider description:

ENABLED	Email provider ID	Email provider description
	EML	Use an email app, such as ...
	Exchange	Use Exchange email server
	SMTP	Use the Dynamics 365 for Finan...

If SMTP is selected, a correct setup in the Email parameters is needed as described below, this is valid for the “D365 Server” as well as for the “D365 User” Email sending mode.

Switch to the module “System administration” > “Setup” > “Email” > “Email parameters”

Click on the tab “SMTP settings” and fill in all parameters. Make sure the checkbox “Specify if SSL is required” is set to true.

Email parameters

SMTP settings

Outgoing mail server: [] | SMTP port number: [] | User name: smtp@finitebox.com | Password: [] | Specify if SSL is required: Yes ☒

If the option “D365 User” is chosen, then D365 FSCM will use the setup at the D365 FSCM user account. How to get to the mask of the user account is illustrated in the picture below.

Options

Account

Set up account information

Account

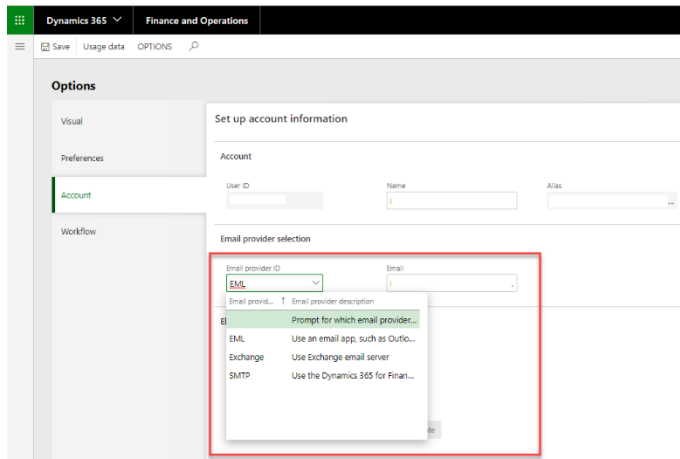
User ID: [] | Name: [] | Alias: [] | Network domain: [] | Telemetry ID: []

Email provider selection

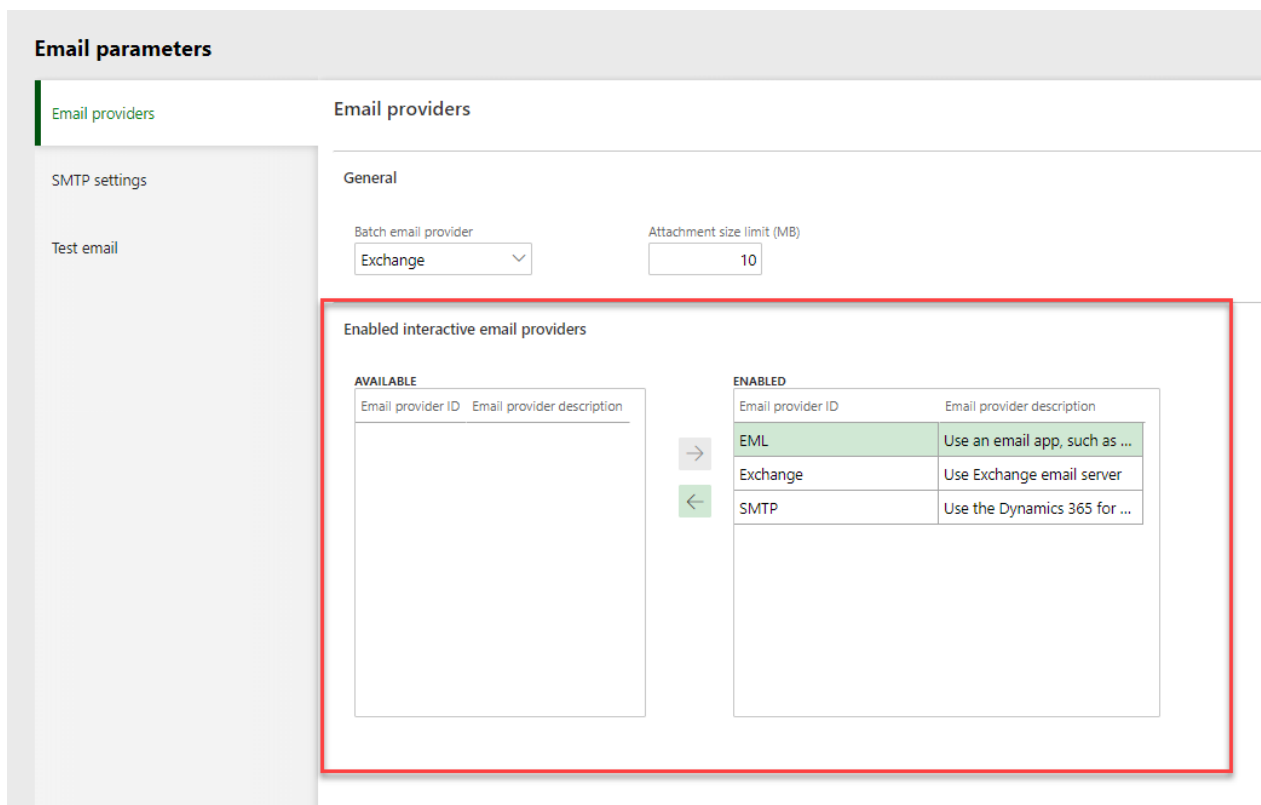
Email provider ID: EML | Email: []

Electronic signature

The drop-down menu “Email provider ID” displays all available option.



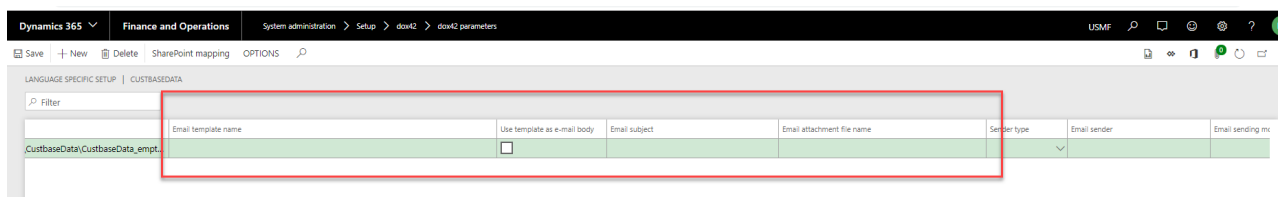
Which options are displayed is predefined in the “Email parameters” in the area “Enabled interactive email providers”.



Everything that is moved to the “ENABLED” side will be displayed at the user options.

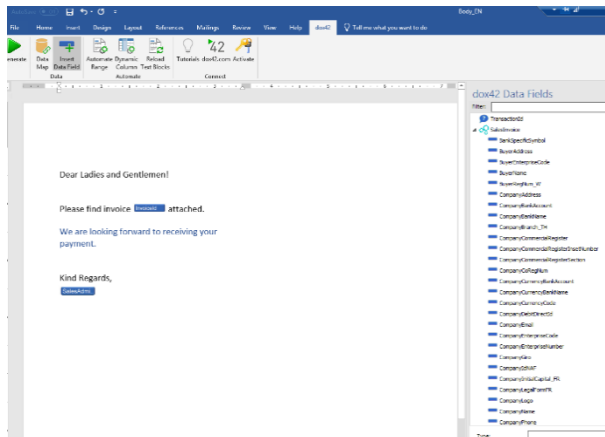
Setting up the additional parameters in the specific report setup

As mentioned before, there are additional fields in the specific report setup.

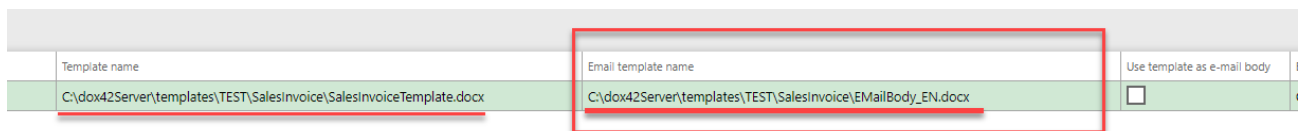


In the field **"Email template name"** it is possible to setup a body for the email. How to do that is explained below:

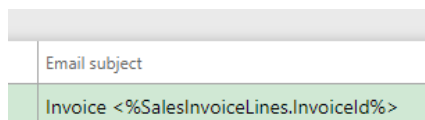
Create a simple report like in the picture below. How to setup dox42 templates is illustrated in the chapter **"Create your first dox42 report"**.



Save it in the same folder as the template of the report and insert the path in the field **"Email template name"**. An example is illustrated below.



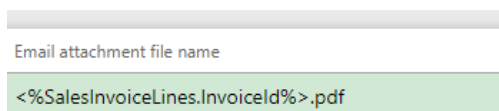
In the field **"Email subject"** it is possible to setup a subject for the email, mixing hard-coded texts with fields from the data provider (<%DataSource.Field%>):



The field **"Email attachment file name"** provides the option to name the attachment file, which will be sent via Email.

Setup the field:

Insert the desired name for the e.g. invoice report. All formats, which are explain by the email subject, can be use by the email attachment file name as well. -coded text.



This will result in an attachment filename like this:



The difference, for the user, between the option “D365 Server” and the option “D365 User”

If the “D365 User” is selected it is possible for the user to customize each email. The picture below displays which areas are possible to modify.

The screenshot shows the 'Send email' interface with several fields highlighted by red boxes to indicate customizable areas:

- Header Fields:** 'Cc' and 'Subject' (containing 'Invoice CIV-00000737').
- Recipient Fields:** 'To' and 'Bcc'.
- Body:** A large text area containing the email content:

Dear Ladies and Gentlemen!

Please find invoice CIV-00000737 attached.

Kind regards,
Your Contoso Team
- Attachments:** A table listing the attached file:

File name	File size
Invoice_CIV-00000737.pdf	1183578

At the bottom right, there are 'Send' and 'Cancel' buttons.

If the “D365 Server” option is selected, D365 FSCM simply sends the email, there is no possibility to change the email.

4.1.5 File Server

If this option is selected, the report will be archived in the predefined format. If a sales invoice is posted, it is possible to select the option "File Server" in the Printer setup. The report is then archived

in the specified path. The setup to save a report in multiple formats in the background is described in the chapter "Archiving of documents".

In the drop-down menu "Print medium" choose the "File Server".

Print destination settings

Insert the path to the folder in which the report should be archived, at the end of the path write the name which the report should get.

Example: C:\\Path to the archiving destination\\<% SalesInvoiceLines.InvoiceID%>

Print destination settings

Next step is to choose a format from the drop-down menu "File format".

Print destination settings

Print archive

Screen

Printer

File

Email

dox42

Save in print archive?

☐ No

Print medium

File server

File name

C:\\Path to the archiving destin...

File format

PDF

PDF

Word 97-2003

HTML

XML

TXT

Excel 97-2003

CSV

Word

Excel

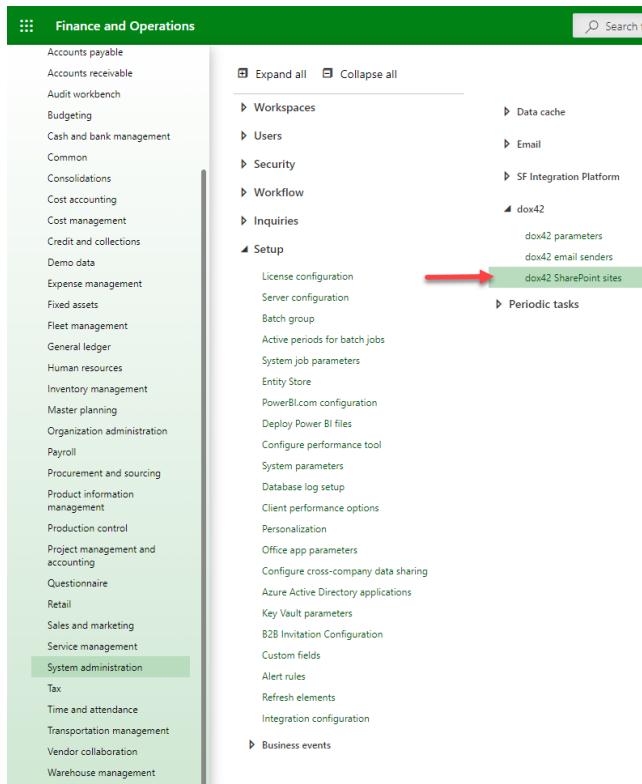
That's all you need, the report is now available in the specified folder, but is not displayed on the screen.

4.1.6 SharePoint

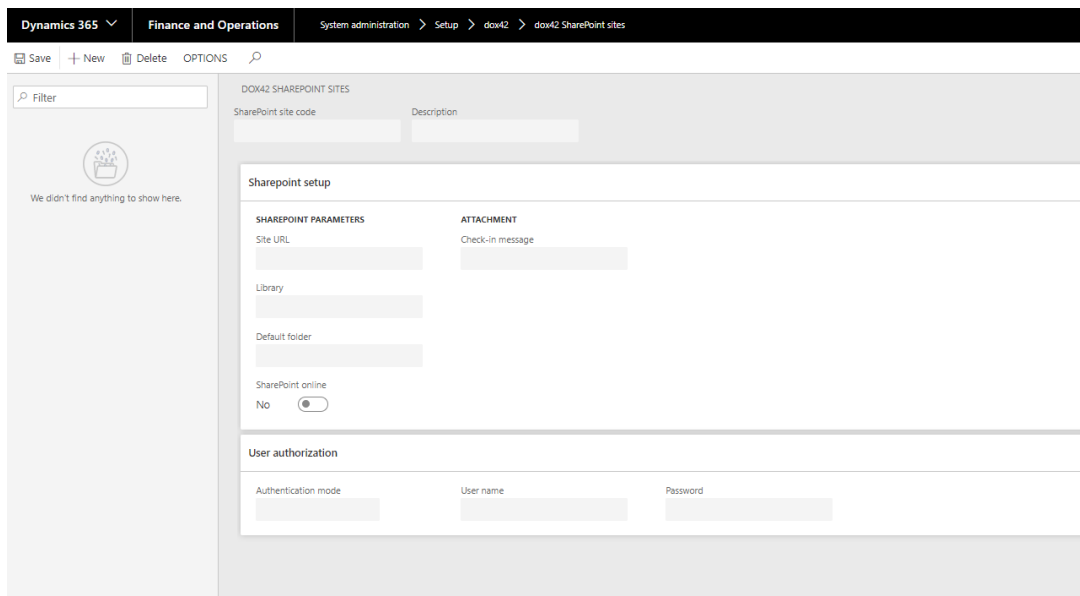
The option SharePoint provides the possibility to archive the reports on the SharePoint. The required setup steps are described below.

Note: It is not possible to use it as a regular print destination, the following setup must be done.

Determine library and folder in Sharepoint. Open dox42 Sharepoint sites in D365 FSCM. Module “System administration” > “Setup” > “dox42” > “dox42 SharePoint sites”



The mask displayed in the image below opens.



Switch to the Sharepoint folder where the report should be saved and copy the link.

The link will look similar to this example:

*https://
company.sharepoint.com/SPlayground/dox42%20Sharepoint%20Archiving%20V1810DemoSF1Eins*

The link consists of the following components:

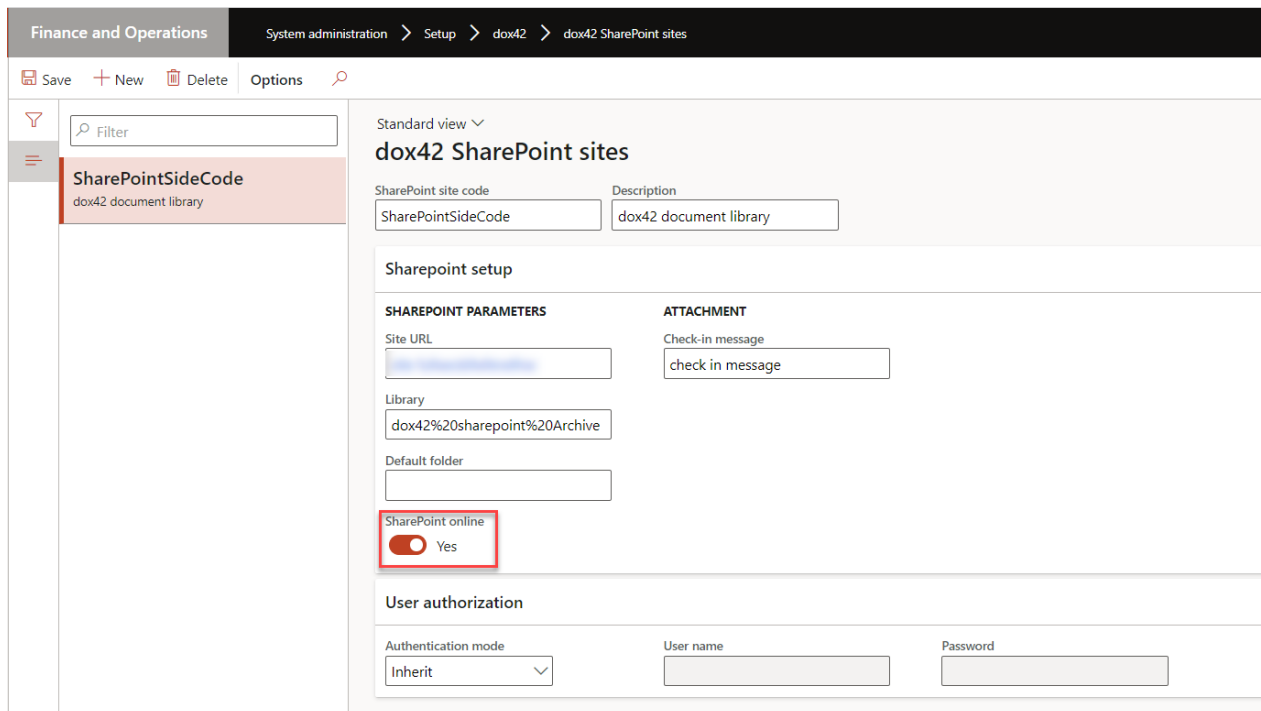
- Link to the Sharepoint: *https://company.sharepoint.com*
- Name of the Site: */SPlayground*

- Name of the Library: `dox42%20Sharepoint%20Archiving%20V1810DemoSF1Eins`

Now create a new Sharepoint site in D365 FSCM by clicking on the button “New” and fill in the parameters as follows:

- Site URL: `https://company.sharepoint.com/SPlayground/`
- Library: `dox42%20Sharepoint%20Archiving%20V1810DemoSF1Eins`
- Check-in message: just an information
- User authorization: User parameters of a user with is authorized to write on the SharePoint. We recommend the authentication mode “Inherit”.

Make sure that the field “SharePoint online” is set to “Yes”.



The screenshot shows the 'dox42 SharePoint sites' configuration page in D365 FSCM. The page is divided into several sections:

- Standard view**: A dropdown menu.
- dox42 SharePoint sites**: The main title of the configuration page.
- SharePoint site code**: A text field containing 'SharePointSideCode'.
- Description**: A text field containing 'dox42 document library'.
- Sharepoint setup**: A section containing two columns:
 - SHAREPOINT PARAMETERS**:
 - Site URL**: A text field.
 - Library**: A text field containing 'dox42%20sharepoint%20Archive'.
 - Default folder**: A text field.
 - SharePoint online**: A toggle switch set to 'Yes', highlighted with a red box.
 - ATTACHMENT**:
 - Check-in message**: A text field containing 'check in message'.
- User authorization**: A section containing:
 - Authentication mode**: A dropdown menu set to 'Inherit'.
 - User name**: A text field.
 - Password**: A text field.

NOTE: There is no “ - ” allowed in the Libraryname

Switch to the dox42 parameters to setup a SharePoint mapping.

(System administration > dox42 > dox42 parameters)

Mark the desired report and click on the button “SharePoint mapping”.

Standard view ▾

dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities

Report setup

[+ New](#)
[Delete](#)
[Report setup](#)
[Archive setup](#)
[Server setup](#)
[SharePoint mapping](#)
[Attachments](#)
[Audit log](#)

	Enabled	Company	Report	Design	Operation	Maxi
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GEMI	SalesInvoice		GenerateDo...	
<input type="checkbox"/>	<input type="checkbox"/>	GLMF	PurchPurchaseOrder		GenerateDo...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GLSI	AgreementConfirmation		Generat...	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	INMF	FreeTextInvoice	ReportIN	GenerateDo...	

The mask displayed in the image below opens.

Dynamics 365 Finance and Operations

Save + New Delete OPTIONS

Filter

SharePoint mapping code ↑ Description

SHAREPOINT MAPPING | SALESINVOICE

SharePoint mapping code Description

Setup

+ Add Remove

SP Column	Value

Add the columns which should be filled on the Sharepoint, in the “Setup” area. The column “Name” on the Sharepoint will be automatically filled, but for example the columns “InvoiceID” have to be inserted at the setup-area in the Sharepoint mapping.

+ New ▾ Upload ▾ Quick edit Share Copy link Sync Export to Excel Flow ▾ ...

dox42 Sharepoi... > SalesInvoice

Name ▾	InvoiceID ▾	Modified ▾	Modified By ▾	+ Add column

SP Column	Value
InvoiceID	<%SalesInvoiceLines.InvoiceId%>

If the column "InvoiceID" on the Sharepoint should be filled, the value field looks like this:

`<%SalesInvoiceLines.InvoiceId%>`

"SalesInvoiceLines" is the table in which the "InvoiceId" is stored. The name of the table as well as the name of the field can be looked up in the Datamap of the report.

Data Sources

- Input Parameter: TransactionId
- Crypto: Crypto1
- Excel Data Source: Connection
- D365 FSCM Report: SalesInvoiceHeader
- D365 FSCM Report: SalesInvoiceLines**
- D365 FSCM Report: ReportParameters
- D365 FSCM Entity: Dox42ReportStorageLastRecordsV3_SF

D365 FSCM Report Data Source

Name: SalesInvoiceLines

D365 FSCM Report: SalesInvoice

Table: SalesInvoiceTmp [Show Invoice]

Fields:

- InvoiceAmount [Total amount]
- InvoiceAmountEuro [Amount in transaction currency]
- InvoiceAmountMST [Amount]
- InvoiceForFree_IT [InvoiceForFree_IT]
- InvoiceId [Invoice]**
- InvoiceReportLineType_IT [InvoiceReportLineType_IT]
- InvoiceRoundOff [Round-off]
- InvoiceRoundOffEuro [Round-off]
- InvoiceRoundOffMST [Round-off]
- InvoiceRoundOff_AE [Round-off]
- IsCreditInvoicingReportEnabled [IsCreditInvoicingReportEnabled]
- IsCreditInvoicingReportEnabled_W [IsCreditInvoicingReportEnabled_W]
- IsInvoiceRefVisible [IsInvoiceRefVisible]
- IsTaxAmountMST [IsTaxAmountMST]
- IsTaxAmountMSTVisible [IsTaxAmountMSTVisible]
- IsTaxAmountVisible [IsTaxAmountVisible]

Save the Sharepoint mapping and switch to the dox42 parameters. The linking of the report with the Sharepoint setup is done in the dox42 parameters.

Standard view ▾
dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails
Custom print destinations
Print destination extensions

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Print destination extension

	SharePoint site code	SharePoint folder name	SharePoint file name	SharePoint mapping code	Custo
✓					

Insert the "SharePoint site code", which contains the location as well as the library of the SharePoint. The field "SharePoint folder name" defines in which folder, on the SharePoint, the report should be saved. The SharePoint mapping code contains the information how the columns on the SharePoint are filled. The SharePoint file name contains the name you want to give to the report file.

Save Options

Standard view ▾
dox42 parameters

General
Users
Reports
Data entities
Printers
Emails

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Synchronize

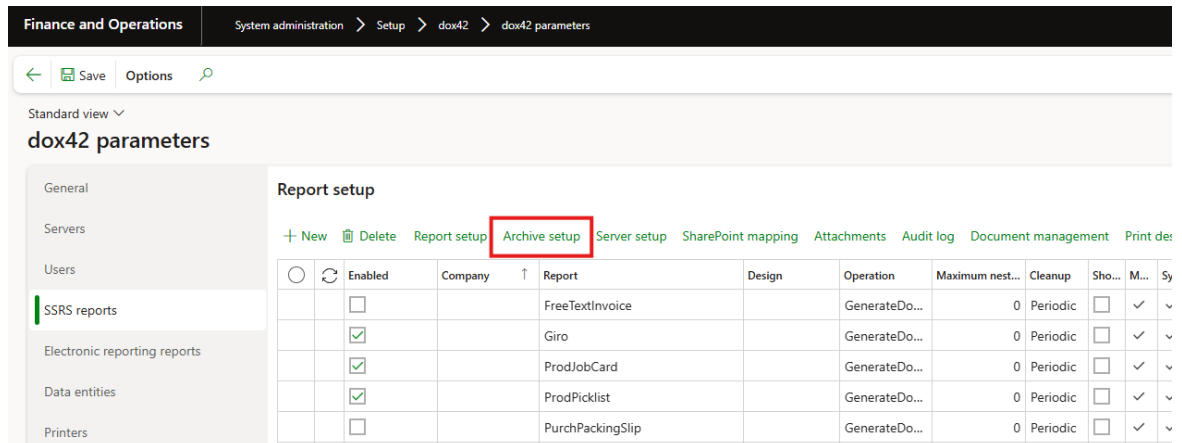
	Ena...	Co...	Report	Dest...	Maxim...	Cleanup	Show SS...	Meta...	Synchron...	Sender t...	Em...	Email sending mode	SharePoint site code	SharePoint folder name	SharePoint file name	SharePoint mapping code
✓	✓		CustBaseData	0	Periodic	✓	✓	✓	Fixed	El...	D365 Server	_test	v1810testsp1/Customer base data report	Customer Base Data	Cust Base Data Mapping	
✓	✓		FreeTextInvoice	0	Periodic	✓	✓	✓								
✓	✓		ProdPicklist	0	Pe...	✓	✓	✓								
✓	✓		PurchPackingSlip	0	Periodic	✓	✓	✓								
✓	✓		PurchPurchaseOrder	0	Periodic	✓	✓	✓								
✓	✓		RetailLabel	0	Periodic	✓	✓	✓								

It is possible to setup the file name mixing a hard-coded text with the fields from the data provider using placeholders (e.g. <%YourDataSourceName.YourFieldName%>). An example of how the dynamic name of a SharePoint file name can look like is illustrated in the screenshot below.

SharePoint site code	SharePoint folder name	SharePoint file name	SharePoint mapping code
_test	v1810testsp1/Customer base data report	<%CustBaseData.AccountNum%>	Cust Base Data Mapping

The next step is to setup the printer management for the SharePoint.

- Mark the desired report and click on the button “Archive setup”



Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view ▾

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

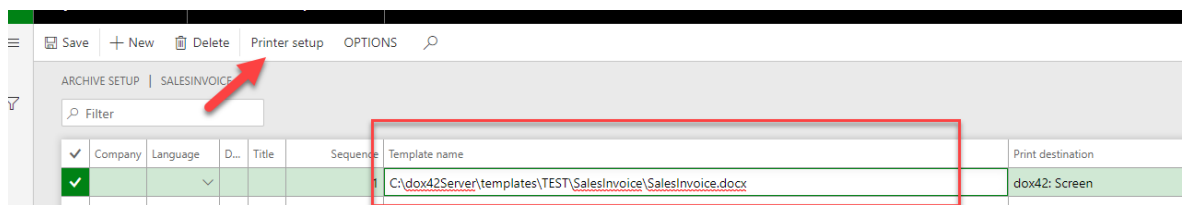
Printers

Report setup

+ New Delete Report setup **Archive setup** Server setup SharePoint mapping Attachments Audit log Document management Print des

	Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Sy
<input type="checkbox"/>	<input type="checkbox"/>		FreeTextInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	✓	▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Giro		GenerateDo...	0	Periodic	<input type="checkbox"/>	✓	▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		ProdJobCard		GenerateDo...	0	Periodic	<input type="checkbox"/>	✓	▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		ProdPicklist		GenerateDo...	0	Periodic	<input type="checkbox"/>	✓	▾
<input type="checkbox"/>	<input type="checkbox"/>		PurchPackingSlip		GenerateDo...	0	Periodic	<input type="checkbox"/>	✓	▾

- Click on the button “new” and insert the path of the template in the field “Template name”, then click on the button “Printer setup”



Save + New Delete Printer setup OPTIONS

ARCHIVE SETUP | SALESINVOICE

Filter

✓	Company	Language	D...	Title	Sequence	Template name	Print destination
<input checked="" type="checkbox"/>		▼				C:\dox42Server\templates\TEST\SalesInvoice\SalesInvoice.docx	dox42: Screen

- Select the option “SharePoint” in the drop-down menu “Print medium” and fill in the field “site code”.

Print destination settings

dox42

Save in print archive?
No ☐

Print medium
SharePoint ▾

Site code
SharepointSiteCode ▾

Folder name

File name

File format
PDF ▾

The field “File name” provides the possibility to give the files a dynamic name (e.g. the InvoiceID).

Print destination settings

dox42

Save in print archive?

No

Print medium

SharePoint

Site code

SharepointSiteCode

Folder name

File name

<%SalesInvoiceLines.InvoiceId%>

File format

PDF

Set the value of the field "Archiving enabled" to "yes", in the "Archive setup".

Now the setup for the archiving on the Sharepoint is finished. If a sales invoice is printed it will automatically be archived on the SharePoint.

Note: If side code and report setup have different folders, D365 FSCM chooses the folder from report setup

Setting up the SharePoint archiving for different templates

In the specific setup form of a report it is possible to create several templates for different companies/languages and setup different site codes, folders and mappings for archiving. The images below illustrate how to get to the specific report setup.

Mark the desired report and click on the button “Report setup”.

dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails

Report setup

+ New Delete **Report setup** Archive setup Server setup SharePoint mapping Attachments Audit

	Enabled	Company	Report	Design	Operation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	USMF	SalesInvoice		Generat...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ADAH	SalesInvoice		GenerateDo...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DEMF	SalesInvoice		GenerateDo...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	GEMI	SalesInvoice		GenerateDo...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	INMF	SalesInvoice_IN		GenerateDo...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RUMF	SalesInvoice		GenerateDo...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SYAA	SalesInvoice		GenerateDo...

The setup in the report itself has the highest priority and will be used even if outside the report is also a SharePoint setup:

Dynamics 365 Finance and Operations System administration > Setup > dox42 > dox42 parameters USMF

Save + New Delete SharePoint mapping OPTIONS

LANGUAGE SPECIFIC SETUP | SALESINVOICE

Filter

	C...	L...	D...	T...	Template name	E...	Use...	E...	S...	E...	SharePoint site code	SharePoint folder name	SharePoint file name	SharePoint mapping code
<input checked="" type="checkbox"/>					C:\dox42Server\templates\1810DemoSFP1\SalesInvoice_SF\SalesInvoice_EN.docx	<input type="checkbox"/>								
<input type="checkbox"/>					C:\dox42Server\templates\1810DemoSFP1\SalesInvoice_SF\SalesInvoice.docx	<input type="checkbox"/>								

Archiving an “D365 FSCM entity” report (OData report)

There is not really a difference between archiving reports based on “D365 FSCM entity” and “normal” reports based on “D365 FSCM report”. Everything is available at the Data entities setup.

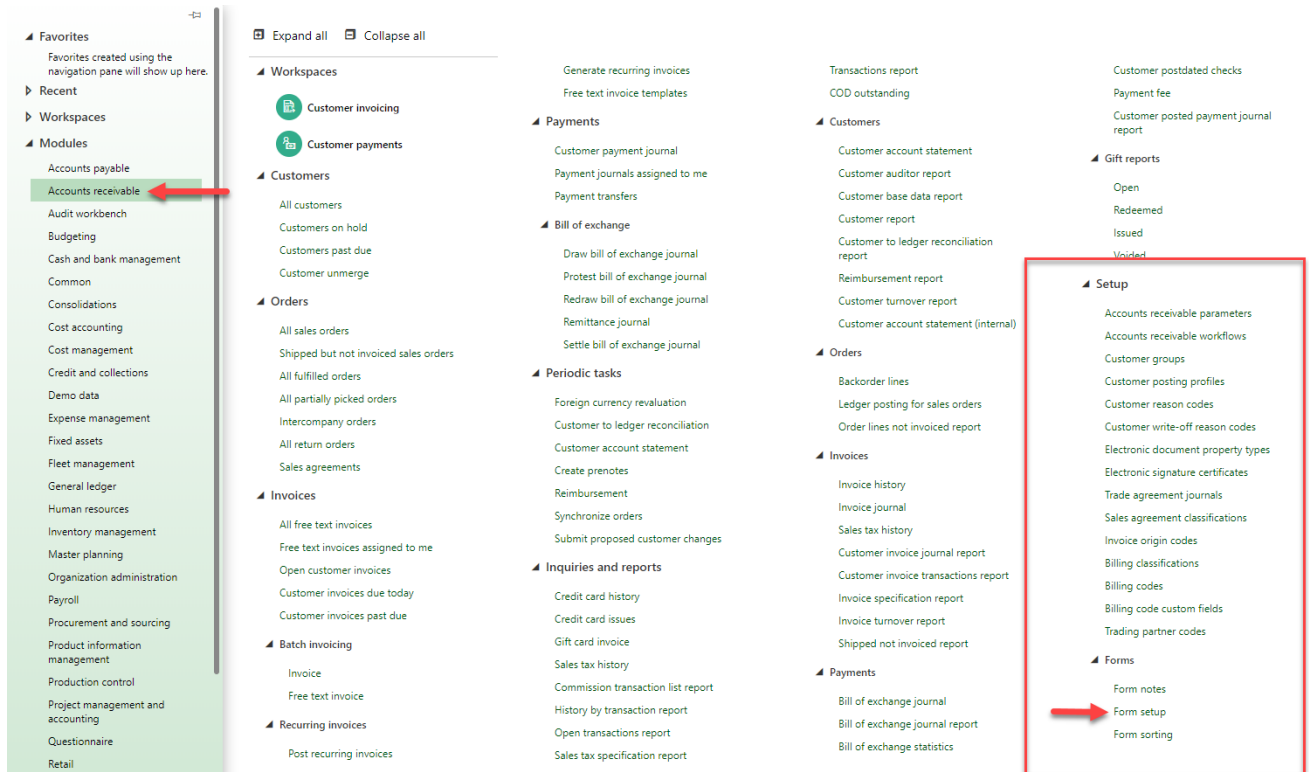
Note: It is unavailable to show data entity report on screen and archive it in SharePoint. It is only possible to archive it or show it on the screen.

4.2 Print management

The print management is an important feature, it is one way to define how the report will be handled.

How to get there?

In every module with a form setup it is possible to use the print management. How to get to the print management is illustrated in the pictures below.



The screenshot shows the dox42 application interface. On the left is a navigation menu with categories: Favorites, Recent, Workspaces, and Modules. Under Modules, 'Accounts receivable' is highlighted with a red arrow. The main area displays a list of modules and reports. A red box on the right highlights the 'Setup' section, which includes 'Accounts receivable parameters', 'Accounts receivable workflows', 'Customer groups', 'Customer posting profiles', 'Customer reason codes', 'Customer write-off reason codes', 'Electronic document property types', 'Electronic signature certificates', 'Trade agreement journals', 'Sales agreement classifications', 'Invoice origin codes', 'Billing classifications', 'Billing codes', 'Billing code custom fields', 'Trading partner codes', 'Forms', 'Form notes', 'Form setup' (highlighted with a red arrow), and 'Form sorting'.

Form setup

General

Quotation

Confirmation

Picking list

Packing slip

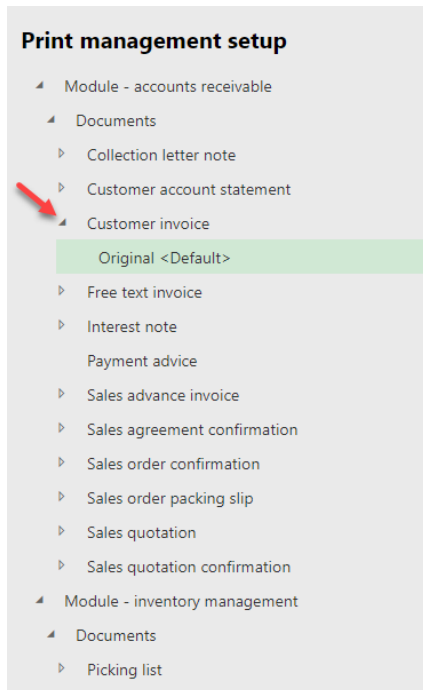
Invoice

Set up options for customer forms

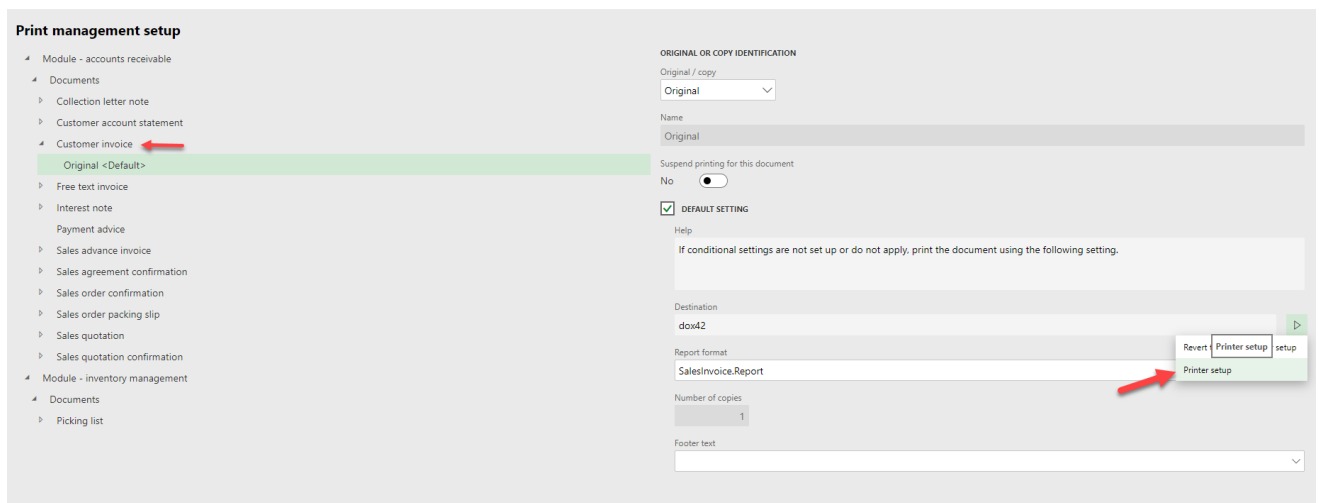
Print management (highlighted with a red arrow)

ITEM NUMBER	DESCRIPTION	AMOUNT	SALES TAX	PRODUCT DIMENSIONS
Item number in forms	Include both name and description	Print amount in currency represent...	Sales tax specification	Print product dimensions
Both	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Registration and company cu...	Under item line
Blank item number in forms	External item description	Totals	Separate tax exempt balance in forms	Product dimension separator
	Append	First	No <input type="checkbox"/>	:

A form like in the picture will appear, it displays all the reports which are available for the printer setup. A click on the little triangle will display the different instances of the reports.



A click on the “Printer setup” button will lead to the printer destination settings, in which it is possible to decide how the report should be processed.



Print destination settings

dox42

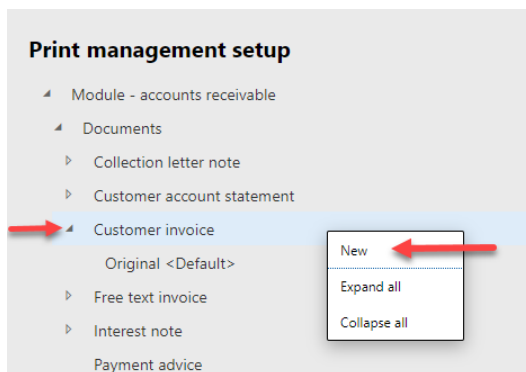
Save in print archive?
No ☐

Print medium
Screen

- Screen
- Printer
- File
- Email
- File server
- SharePoint

The behavior of the different print mediums is explained below.

D365 FSCM provides the functionality to add more than one instance (right click on the report name, the report will be processed in all the defined ways).



Possible print mediums in the print management:

- **Printer**

If the "printer" is selected, a printer must be chosen on which the report should be printed.

- **Screen**

The report will be printed on the screen in D365 FSCM.

- **File**

The report will be downloaded in the chosen format.

- **Email**

This setup is needed for the feature of sending reports via email. Sending reports via email is described in the chapter "Send documents via email".

- **File server**

The file server setup is required if the report should be stored in a folder, described in the chapter "Configure report destination".

- **SharePoint**

To store reports on the SharePoint the SharePoint setup is needed, described in the chapter “Configure report destination”.

4.2.1 Emails

D365 FSCM provides the feature to send reports via Email. In this section the following parts will be explained:

- the ways of defining a recipient
- send emails via print management

Defining a recipient

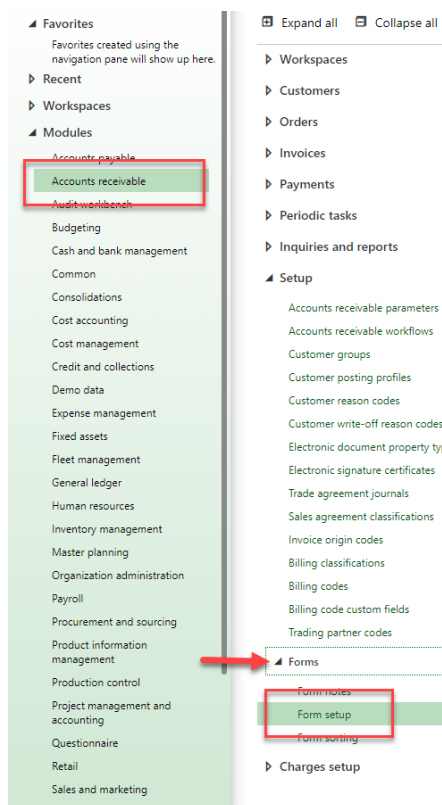
There are two different ways to setup the recipient of an email, the manual way and the dynamic way.

The manual way – using a fixed email address as the recipient

The recipient of the email is always specified in the print management, regardless of whether the manual or dynamic way is selected.

Switch to the print management of the desired report (e.g. SalesInvoice):

- Choose the module e.g. “Accounts receivable” > “Setup” > “Forms” > “Form setup”



- Select the desired report and click on the button “Print Management”

Dynamics 365 Finance and Operations Accounts receivable > Setup > Forms > Form setup

Form setup

General

Set up options for customer forms

Print management

ITEM NUMBER

Item number in forms: Both

Blank item number in forms:

DESCRIPTION

Include both name and description: Yes

External item description: Append

AMOUNT

Print amount in c: No

Totals: First

- Select the desired report and click on the “Arrow” button. Select the option “Printer setup”

Print management setup

Module - accounts receivable

Documents

Collection letter note

Customer account statement

Customer invoice

Original <Default>

Free text invoice

Interest note

Payment advice

Sales advance invoice

Sales agreement confirmation

Sales order confirmation

Sales order packing slip

Sales quotation

Sales quotation confirmation

Module - inventory management

Documents

ORIGINAL OR COPY IDENTIFICATION

Original / copy: Original

Name: Original

Suspend printing for this document: No

DEFAULT SETTING

Help

If conditional settings are not set up or do not apply, print the document using the following setting.

Destination: dox42

Report format: SalesInvoiceReport

Number of copies:

Printer setup

- Select from the drop-down menu "Print medium" the element "Email" and insert the email addresses.

Print destination settings

Save in print archive?
No ☐

Print medium
Email

To
Max.Mustermann@email.com Edit

Cc
Edit

Bcc
Edit

Subject

File format
PDF

OK Cancel

D365 FSCM will now send every email to this email address.

The dynamic way – using different purposes (best practice for form letters)

D365 FSCM provides the feature to set different purposes in the email address setup. Those purposes are used to decide to which email address the report will be sent. For example, there might be an email address for sales invoices and an email address for confirmations, as shown in the picture below. This setup is ideal for form letters like the sales invoice.

Contact information

+ Add Remove Edit contact information



Description	Type	Contact number/address	Extension	Primary ↓	
Phone	Phone	111 555 0077		<input checked="" type="checkbox"/>	
Email Invoices	Email address	max.mustermann@muster.at		<input checked="" type="checkbox"/>	
Email Business (Confirmations)	Email address	maxima.musterfrau@muster.at		<input type="checkbox"/>	


Setup the purpose of an email address:

- switch to the contact information of a customer or vendor

- click on the “Add” button



Contact information



+ Add  Remove  Edit contact information

Description	Type	Contact number/address	Extension	Primary ↓	
Phone	Phone	111-555-8877		<input checked="" type="checkbox"/>	

- Insert all required information (description, type, email address)

Contact information

+ Add  Remove  Edit contact information

Description	Type	Contact number/address	Extension	Primary ↓	
	Email address			<input type="checkbox"/>	
Phone	Phone	111-555-8877		<input checked="" type="checkbox"/>	



Email address



URL

Telex

- Click on the button “Edit contact information”

Contact information

+ Add  Remove  Edit contact information

Description	Type	Contact number/address	Extension	Primary ↓	
Email Invoices	Email address	max.mustermann@muster.at		<input type="checkbox"/>	
Phone	Phone	111-555-8877		<input checked="" type="checkbox"/>	

- Select the desired purpose for the email address (in this case “Invoice”)

Edit contact information

Description
Email Invoices

Type
Email address

Email address
max.mustermann@muster.at

Purpose
Business

Role ↑

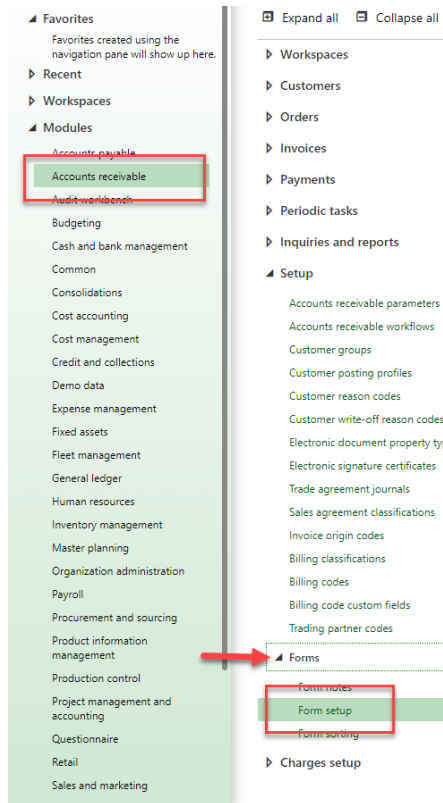
Role	Description
<input type="checkbox"/>	Business
<input type="checkbox"/>	Home
<input checked="" type="checkbox"/>	Invoice
<input type="checkbox"/>	Other
<input type="checkbox"/>	Recruit
<input type="checkbox"/>	SKL
<input type="checkbox"/>	SMS

Select

Note: it is possible to select multiple purposes for one email address.

Setting up the print management for using the purposes of the email addresses:

- Switch to the form setup of the desired report (e.g. SalesInvoice)



- Click on the button “Print management”

The screenshot shows the 'Form setup' page in Dynamics 365. The breadcrumb trail at the top reads: 'Accounts receivable > Setup > Forms > Form setup'. The left sidebar lists various form types: 'General', 'Quotation', 'Confirmation', 'Picking list', 'Packing slip', 'Invoice', and 'Free text invoice'. The 'General' form type is selected. The main area is titled 'Set up options for customer forms'. A red arrow points to the 'Print management' button, which is highlighted with a red box. Below this button, there are settings for 'ITEM NUMBER' and 'DESCRIPTION'. The 'ITEM NUMBER' section has two dropdowns: 'Item number in forms' (set to 'Both') and 'Blank item number in forms'. The 'DESCRIPTION' section has a toggle for 'Include both name and description' (set to 'Yes') and a dropdown for 'External item description' (set to 'Append'). On the right, there is an 'AMOUNT' section with a toggle for 'Print amount in c' (set to 'No') and a dropdown for 'Totals' (set to 'First').

- Select the desired report and click on the “Arrow” button. Select the option “Printer setup”.

- Choose the print medium “Email” and click on the button “Edit”.

- Select the desired purpose

Role	Description
Business	Business
Home	Home
<input checked="" type="checkbox"/> Invoice	Invoice
Other	Other
Recruit	Recruit
SKL	SKL
SMS	SMS

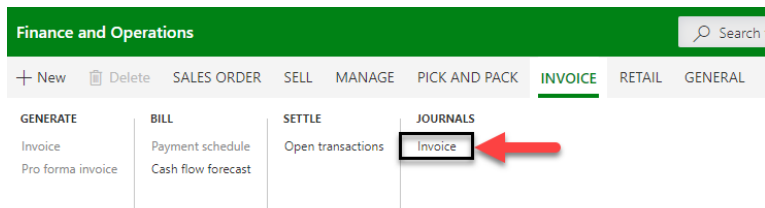
If an email is sent, then the D365 FSCM will check which email addresses are assigned to this purpose. How to send emails will be explained at the end of this chapter.

4.2.2 Using the print management as print destination

The next section describes how to use the print management as print destination while e.g. posting a sales invoice.

Journals

Mark e.g. the sales invoice which should be printed to the print destination which is setup in the print management.

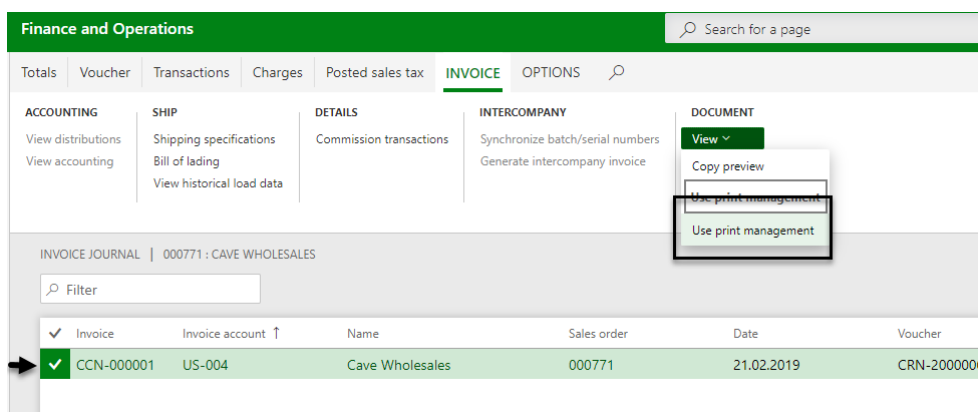


ALL SALES ORDERS

Filter

✓ Sales order ↑	Customer account	Customer name	Order type
000768	US-001	Contoso Retail San Diego	Returned order
000769	US-002	Contoso Retail Los Angeles	Returned order
000770	US-004	Cave Wholesales	Returned order
000771	US-004	Cave Wholesales	Returned order
000772	US-006	Contoso Retail Portland	Returned order
000773	DE-001	Contoso Europe	Sales order
000776	US-027	Birch Company	Sales order
000783	US-001	Contoso Retail San Diego	Sales order
✓ 000784	US-003	Forest Wholesales	Sales order
000785	US-019	Sunflower Wholesales	Sales order
000810	US-003	Forest Wholesales	Sales order

Click on the drop-down menu "View" and choose the "Use print management"



Using the print management while posting

Mark the invoice which should be posted and click on the button “Invoice”. Set the checkbox “Use print management” to yes.

Posting invoice

Arrange | **Select** | Printer setup

Parameters

PARAMETER	COMPLIANCE DOCUMENTS	PRINT OPTIONS	SETUP	SUMMARY ORDER
Quantity	Invoice type each equipment setting	Print	Check serial limit	Summary update for
All	No	After	Balance all	None
Printing	Print production data photo	Print header	Costs conversion	
Yes	No	Yes	No	
Line selection		Use print management (parameters)	Credit conversion	
No		No	No	
Rollback quantity		Print COD	Credit conversion by entry	
No		No	No	
		Print missing items		
		No		
		Print margin		
		Show details		

Overview

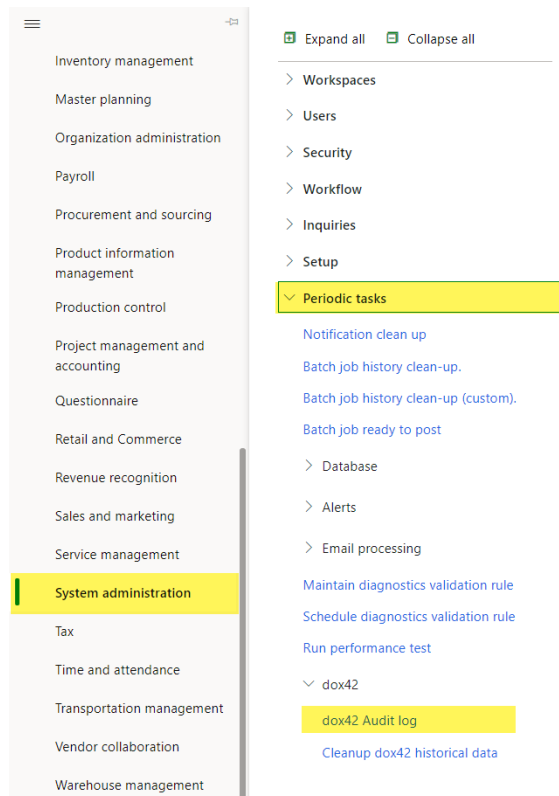
	Invoice	Customer	Sales order	Sales tax	Payment schedule
✓	Invoice	Customer	Sales order	Sales tax	Payment schedule

OK Cancel Batch

5 Traceability – dox42 audit log

It is important to know how the reports have been processed. The dox42 Audit Log register all processed dox42 reports.

The “dox42 Audit Log” can be found in the module “System administration” > “Periodic tasks” > “dox42”, as illustrated in the picture below.



The most important information of a processed report will be registered in the dox42 Audit log, shown in the picture below.

Log details Parent log Child log Download data Retry request Options

Standard view

dox42 Audit log

Filter Log type Print medium

Trace ID	Log type	Created date and time	Created by	Report type	Language	Report	Design	Root data entity	Title	Data id
✓ (3DC479DC-19D5-4FE3-8269-AA52F9BCC7F9)	dox42 server call			SSRS report	en-us	SalesConfirm	Report		View original	
✓ (3DC479DC-19D5-4FE3-8269-AA52F9BCC7F9)	dox42 print destination request			SSRS report	en-us	SalesConfirm	Report		View original	
✓ (3DC479DC-19D5-4FE3-8269-AA52F9BCC7F9)	dox42 output processing			SSRS report	en-us	SalesConfirm	Report		View original	
✓ (3CB0BDF0-D2C6-4E8B-96A8-7E331972A94C)	dox42 data serialization			SSRS report	en-us	SalesConfirm	Report		View original	
✓ (3CB0BDF0-D2C6-4E8B-96A8-7E331972A94C)	dox42 server call			SSRS report	en-us	SalesConfirm	Report		View original	
✓ (3CB0BDF0-D2C6-4E8B-96A8-7E331972A94C)	dox42 print destination request			SSRS report	en-us	SalesConfirm	Report		View original	

One Report/Entity run creates several lines with the same Trace ID which are divided into different Log types.

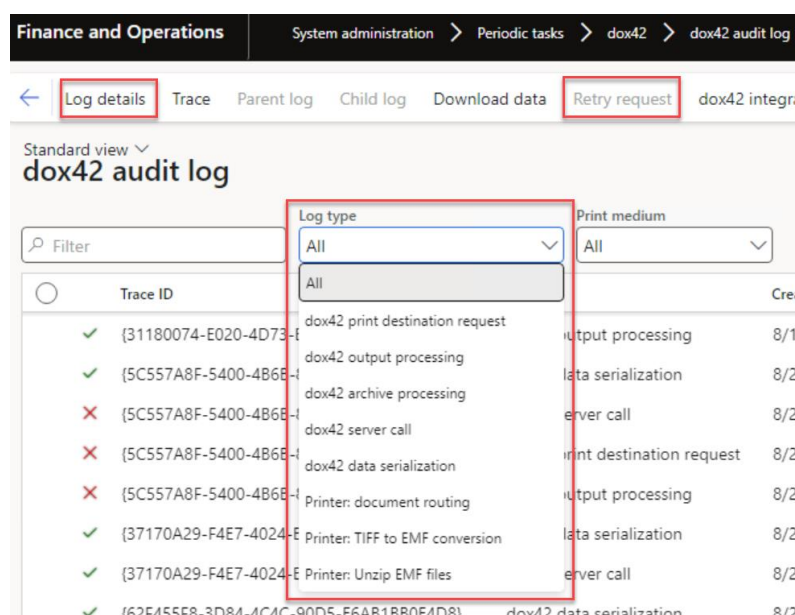
Log types used for reports:

- dox42 output processing – total execution of the dox42 logic
- dox42 data serialization – serializing report's data, it is a part of “dox42 output processing”.
- dox42 print destination request – release to print destination (screen, file, printer, etc.), it is a part of “dox42 output processing”.
- dox42 server call – interaction with dox42 server, it is a part of “dox42 print destination request” or “dox42 archive processing”.
- Printer: document routing – document routing processing (only when printing to a printer with “Document Routing Agent” active), it is a part of “dox42 print destination request”.

- Printer: TIFF to EMF conversion – total execution of the conversion logic (only when printing to a printer with “Document Routing Agent” active and “Document routing mode” = “TIFF to EMF”), it is a part of “Printer: document routing”.
- Printer: Unzip EMF files – total execution of the unzipping logic (only when printing to a printer with “Document Routing Agent” active and “Document routing mode” = “EMF”), it is a part of “Printer: document routing”.
- dox42 archive processing – total execution of the dox42 archiving logic, it is a part of “dox42 output processing” in case of synchronous archiving.

Log types used for data entities:

- dox42 output processing – total execution of the dox42 logic.
- dox42 print destination request – release to print destination (screen, file, printer, etc.), it is a part of “dox42 output processing”.
- dox42 server call – interaction with dox42 server, it is a part of “dox42 print destination request”.
- Printer: document routing – document routing processing (only when printing to a printer with “Document Routing Agent” active), it is a part of “dox42 print destination request”.
- Printer: TIFF to EMF conversion – total execution of the conversion logic (only when printing to a printer with “Document Routing Agent” active and “Document routing mode” = “TIFF to EMF”), it is a part of “Printer: document routing”.
- Printer: Unzip EMF files – total execution of the unzipping logic (only when printing to a printer with “Document Routing Agent” active and “Document routing mode” = “EMF”), it is a part of “Printer: document routing”.



Clicking on the button **Log details** in dox42 Audit log form you can see detailed audit log entry view.

Retry request button is available for log type - dox42 print destination request.

Enabled **Data cache used** for “dox42 data serialization” log type means that the data was not generated newly while report running but was taken from the cache. **Document cache used** checkbox is used for “dox42 server call” log type means the document was taken from the cache instead of sending a request to the dox42 server.

Finance and Operations System administration > Periodic tasks > dox42 > dox42 Audit log USMF

Parent log Child log Download data Retry request Options

VIEW ORIGINAL: SSRS REPORT | Standard view

dox42 Audit log details

General

IDENTIFICATION Log type dox42 data serialization Report type SSRS report Language en-us Title View original	Data identifier Source transaction 5637297737 SYSTEM Print medium type Screen Status Okay Duration (s) 0.05	TRACE Trace ID {06EF5D7F-1527-4263-9827-9D... Parent trace ID {00000000-0000-0000-0000-00... Non-interactive session <input type="radio"/> No ADMINISTRATION Created date and time 10/1/2022 03:21:22 PM Created by Elizaveta.Sharshkova	SSRS REPORT Report SalesConfirm Design Report DATA ENTITY Root data entity CACHING Cache enabled <input checked="" type="checkbox"/> Yes	TEMPLATE Operation GenerateDocument Template name
--	---	---	--	---

Data cache used
☒ Yes
Document cache used
☐ No

If you do the setup of “Archive setup” (File server or SharePoint) in dox42 parameters for the report, extra lines per each archive process will be added in dox42 audit log. **Trace ID** will be different in case of asynchronous archiving is enabled. Clicking on **Parent log** button you will find the **Trace ID** of the initial run of the report (output processing). The same works vice versa with checking the **Child log** of the output processing.

Finance and Operations System administration > Periodic tasks > dox42 > dox42 Audit log

Log details Parent log Child log Download data Retry request Options

Standard view

dox42 Audit log

Filter Log type All Print medium All

	Trace ID	Log type	Created date and time
✗	{3AD08929-3756-4FB6-A05B-F26937A47B73}	dox42 server call	9/30/2022 10:21:38 PM
✗	{3AD08929-3756-4FB6-A05B-F26937A47B73}	dox42 print destination request	9/30/2022 10:21:38 PM
✗	{3AD08929-3756-4FB6-A05B-F26937A47B73}	dox42 output processing	9/30/2022 10:21:38 PM
✓	{09AD0A0D-2670-4BD9-9783-4F84ED8CB241}	dox42 data serialization	9/30/2022 10:28:43 PM
✓	{09AD0A0D-2670-4BD9-9783-4F84ED8CB241}	dox42 server call	9/30/2022 10:30:26 PM
✓	{09AD0A0D-2670-4BD9-9783-4F84ED8CB241}	dox42 print destination request	9/30/2022 10:30:26 PM
✓	{09AD0A0D-2670-4BD9-9783-4F84ED8CB241}	dox42 output processing	9/30/2022 10:30:27 PM
✓	{708374E6-C7E4-4999-843D-DC876664E670}	dox42 server call	9/30/2022 10:30:37 PM
✓	{708374E6-C7E4-4999-843D-DC876664E670}	dox42 print destination request	9/30/2022 10:30:37 PM
✓	{708374E6-C7E4-4999-843D-DC876664E670}	dox42 archive processing	9/30/2022 10:30:37 PM

The column **Cache enabled** shows if the caching function was enabled for the Report/Entity run.

Finance and Operations System administration > Periodic tasks > dox42 > dox42 Audit log USMF

Log details Parent log Child log Download data Retry request Options

Standard view

dox42 Audit log

Filter Log type All Print medium All

	Data identifier	Print medium type	Source transaction	Non-interactive...	Status	Duration (s)	Parent trace ID	Cache enabled
original	File server	Screen	5637296986	✓	Okay	9.94	{09AD0A0D-2670-4BD9-9783-4...	
original	Screen	Screen	5637296986		Okay	1.55	{00000000-0000-0000-0000-00...	
original	Screen	Screen	5637296986		Okay	1.59	{00000000-0000-0000-0000-00...	
original	Screen	Screen	5637296987		Okay	0.17	{00000000-0000-0000-0000-00...	✓
original	Screen	Screen	5637296987		Okay	3.56	{00000000-0000-0000-0000-00...	✓
original	Screen	Screen	5637296987		Okay	3.58	{00000000-0000-0000-0000-00...	✓
original	Screen	Screen	5637296987		Okay	4.25	{00000000-0000-0000-0000-00...	✓
original	File server	Screen	5637296987	✓	Okay	1.34	{FBA16198-D53D-4873-A63E-F3...	✓
original	File server	Screen	5637296987	✓	Okay	1.38	{FBA16198-D53D-4873-A63E-F3...	✓
original	File server	Screen	5637296987	✓	Okay	1.48	{FBA16198-D53D-4873-A63E-F3...	✓

Additionally, you can set up log levels for each log type in the dox42 company parameters form:

Finance and Operations System administration > Setup > dox42 > dox42 company parameters

Save Options

Standard view

dox42 company parameters

General

Audit log

Integration audit log

Audit log setup

General

DOX42 PRINT DESTINATION REQUEST Log level Always

DOX42 OUTPUT PROCESSING Log level Always

DOX42 ARCHIVE PROCESSING Log level Always

DOX42 SERVER CALL Log level Always

DOX42 DATA SERIALIZATION Log level Always

Printer

PRINTER: DOCUMENT ROUTING Log level Always

PRINTER: TIFF TO EMF CONVERSION Log level Always

PRINTER: UNZIP EMF FILES Log level Always

5.1 Preview serialized report data

In D365 FSCM, it is possible to see the raw report data in JSON-format regardless of whether the report design was successfully generated or not. To do this, click the button “Download data” on the dox42 audit log form.

Log details Parent log Child log Download data Retry request Options

Standard view

dox42 Audit log

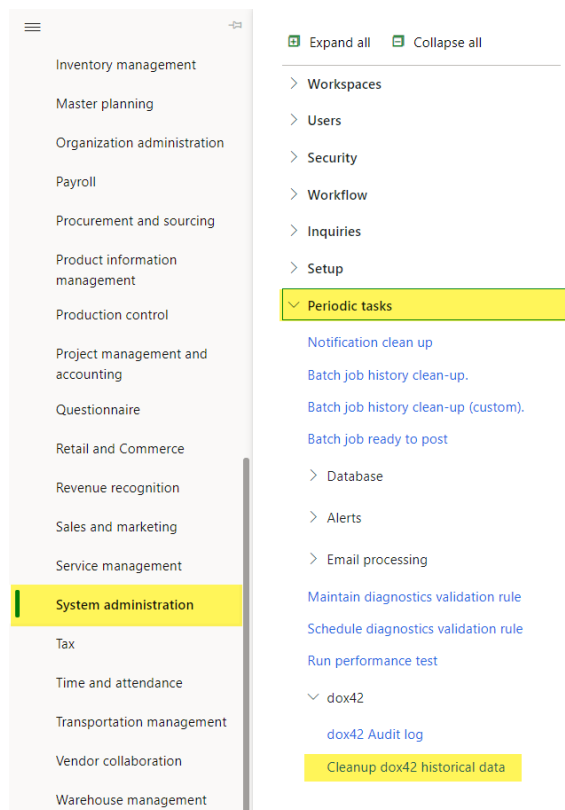
Filter Log type All Print medium All

	Trace ID	Log type	Created date and time	Created by	Report type	Language	Report	Design	Root data entity	Title	Data file
✓	{3DC4792C-19D5-4FE3-8269-AA52F98CC7F9}	dox42 server call			SSRS report	en-us	SalesConfirm	Report		View original	
✓	{3DC4792C-19D5-4FE3-8269-AA52F98CC7F9}	dox42 print destination request			SSRS report	en-us	SalesConfirm	Report		View original	
✓	{3DC4792C-19D5-4FE3-8269-AA52F98CC7F9}	dox42 output processing			SSRS report	en-us	SalesConfirm	Report		View original	
✓	{3C080DF0-D2C6-4E8B-96A6-7E331972A94C}	dox42 data serialization			SSRS report	en-us	SalesConfirm	Report		View original	
✓	{3C080DF0-D2C6-4E8B-96A6-7E331972A94C}	dox42 server call			SSRS report	en-us	SalesConfirm	Report		View original	
✓	{3C080DF0-D2C6-4E8B-96A6-7E331972A94C}	dox42 print destination request			SSRS report	en-us	SalesConfirm	Report		View original	

5.2 Keep it lean and clean

D365 FSCM provides a function to clean up the dox42 audit log. This function can be found in the “System administration” > “Periodic tasks” > “dox42” > “Cleanup dox42 historical data”. The “Cleanup dox42 historical data” will open the form which is illustrated in the picture below. This function makes it possible to delete data from the dox42 audit log in your current company until a specific date.

It is recommended to set up this function in the batch processing mode (run once a day), with a days of limitation period > 0 (e.g. 30)



There is a possibility to select SRSS reports, Electronic reporting reports and/or data entities to be cleaned up and set up additional filters.

Cleanup dox42 historical data

Parameters

PERIOD
Days of limitation period
0

REPORT TYPE
dox42 reports cleanup (SSRS reports)
☒ Yes

dox42 reports cleanup (Electronic rep...
☒ Yes

dox42 data entities cleanup
☒ Yes

Records to include (dox42 reports cleanup)
☒ Filter

DOX42 REPORTS
Cleanup
Periodic

Records to include (dox42 data entities cleanup)
☒ Filter

DOX42 DATA ENTITIES
Company
USMF
Root data entity
VendorV2Entity
Label
Vendors V2 - RSAT (do...
Cleanup
Periodic

Records to include (dox42 reports cleanup (Electronic reporting report)
☒ Filter

DOX42 REPORTS
Cleanup
Periodic
Configuration

OK Cancel

5.3 Identifying the right audit log entry

For a better understanding which entry in the dox42 audit log is the correct document in the D365 FSCM, a identifier setup can be done.

Finance and Operations | System administration > Periodic tasks > dox42 > dox42 Audit log

Retry request Options

Standardsansicht

dox42 Audit log

Filter View

Report	Design	Title	Print medium type	Data identifier	Source transaction	Server request status	Request duration
SalesConfirm		SalesConfirm.Report	Screen	CCF-00000350	5637195605	Okay	1.

5.3.1 Setting up the identifier

1. Mark the desired report and click on the button "Audit log"

dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Print destination

Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Send
<input checked="" type="checkbox"/>	SalesConfirm	SalesConfirm	ReportCZ	Generat...	0	Per...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe
<input checked="" type="checkbox"/>	CNMF	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe
<input checked="" type="checkbox"/>	SYAA	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe
<input checked="" type="checkbox"/>	SYHK	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe
<input type="checkbox"/>	us01	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe
<input checked="" type="checkbox"/>	USMF	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixe

2. Create a new record.

Finance and Operations System administration > Setup > dox42 > dox42 parameters

Save + New Delete Related data Options

Filter

Sales Confirm
Yes

Audit log | Standardansicht | SALESCONFIRM

Setup

Enable ☒ Yes Audit log Sales Confirm Name Sales Confirm Test

Related data

Name Bestätigung anzeigen Related table SalesConfirmDetailsTmp Report table SalesConfirmDetailsTmp

Template

Template

3. Next step is to click on the "related data" button and

Finance and Operations System administration > Setup > dox42 > dox42 parameters

Save + New Delete **Related data** Options

Filter

Sales Confirm
Yes

Audit log | Standardansicht | SALESCONFIRM

Setup

Enable ☒ Yes Audit log Sales Confirm Name Sales Confirm Test

Related data

Name Bestätigung anzeigen Related table SalesConfirmDetailsTmp Report table SalesConfirmDetailsTmp

Template

The related data are displaying the relationships between the tables and the reports tables. It is also possible to create a new relationship, if needed (if there are no records by default, see [FAQ](#))

Finance and Operations System administration > Setup > dox42 > dox42 parameters USMF

Edit + New Delete Options

Filter

Name	Related table	Report table
Bestätigung anzeigen	SalesConfirmDetailsTmp	SalesConfirmDetailsTmp
Bestätigung anzeigen	SalesConfirmHeaderTmp	SalesConfirmHeaderTmp
SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular

Related data | Standardansicht | SALESCONFIRM

Name	Related table	Report table
SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular

Relations

+ New Delete

Relation type	Related table field	Report field	Rang
We didn't find anything to show here.			

4. The desired relationship should be selected in the setup form

The screenshot shows the 'Sales Confirm' setup form. The 'Related data' section is highlighted in yellow. It contains the following fields:

- Name: Bestätigung anzeigen
- Related table: SalesConfirmHeaderTmp
- Report table: SalesConfirmHeaderTmp

The data identifier is set up in the area "Template" and contains of the following components: <% related table.Desired field %>

The screenshot shows the 'Sales Confirm' setup form. The 'Template' section is highlighted in yellow. It contains the following field:

- Confirmation ID: <%SalesConfirmHeaderTmp.ConfirmId%>

If a document is generated the column "data identifier" in the audit log will be filled with the previously set up data.

Finance and Operations							
System administration > Periodic tasks > dox42 > dox42 Audit log							
USMF							
Retry request Options							
Standardansicht dox42 Audit log							
Filter		View					
		All					
Report	Design	Title	Print medium type	Data identifier	Source transaction	Server request status	Request duration
<input checked="" type="checkbox"/>	SalesConfirm	SalesConfirm:Report	Screen	CCF-00000350	5637195605	Okay	1.

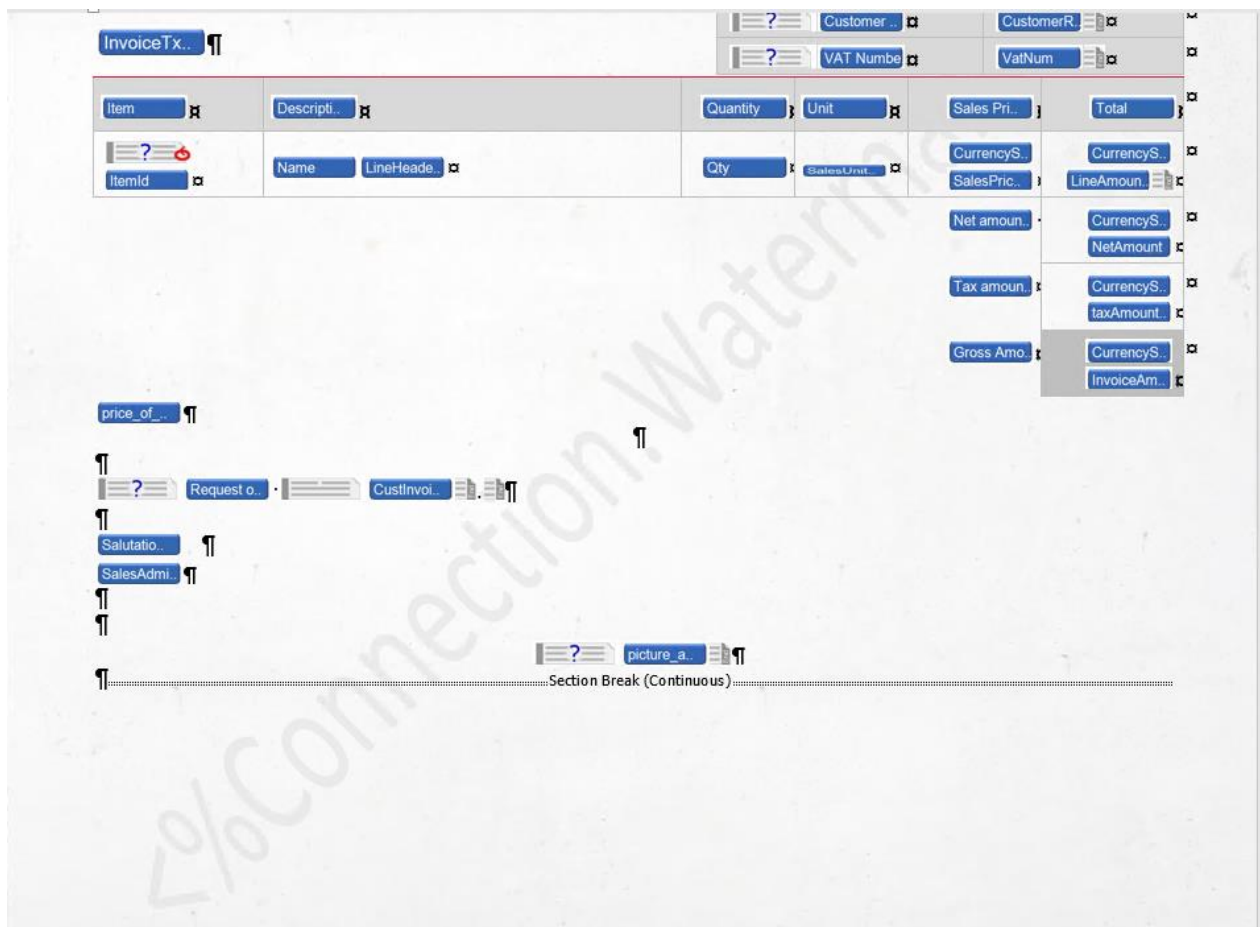
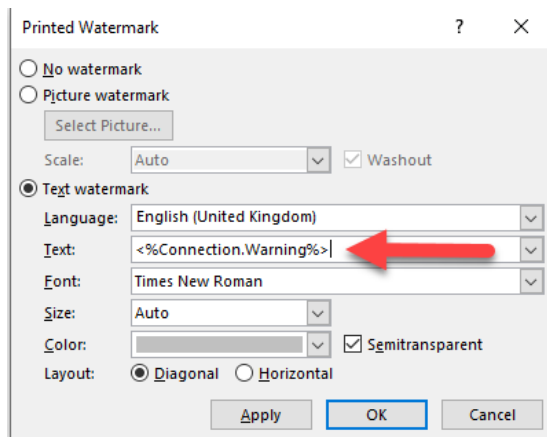
6 Tipps & Tricks

6.1 Creating the warning text as a watermark

Create a normal Word “Custom_Watermark”.

Insert into the text field the following: “<%Connection.Warning%>” and click “ok”.

“Connection” stands for the name of the connection Excel file and “Warning” for the column.



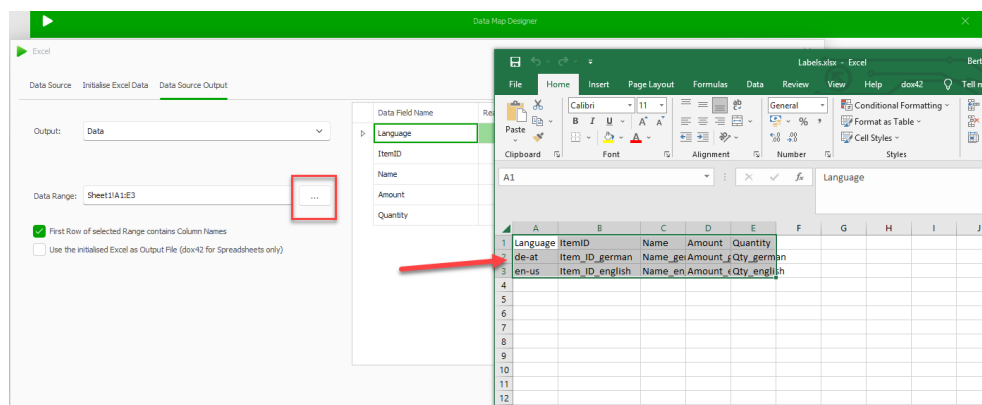
6.2 Use Labels from an Excel document

Normally the headlines of the placeholders are written hard-coded into the report. This has the big advantage of the template being easy-to-read. However, if you need to support multiple language that has the disadvantage of needing a separate report for each language. The solution is to use labels instead of hard-coded text.

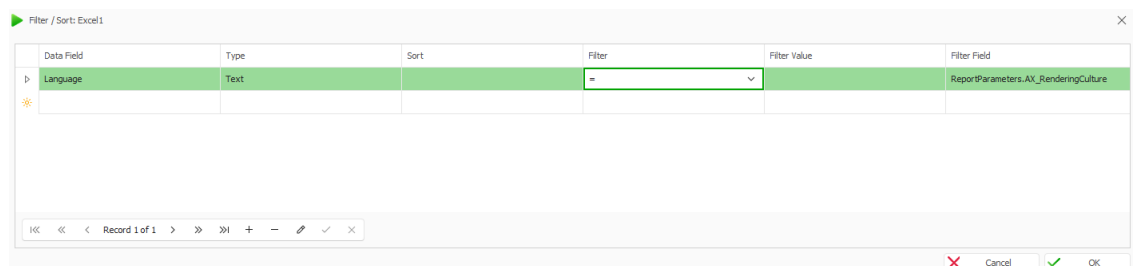
1. Create an Excel file with the required languages like in the picture below. Make sure the Excel file has a column "Language" with the abbreviation.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Language	Item	Description	Quantity	Unit	Sales Price	Total	Tax	InvoiceID	Invoice Date	Sales Order	Invoice Account	VAT Number	Customer Referenz	Net
2	us-en	Item	Description	Quantity	Unit	Sales Price	Total	Tax	InvoiceID	Invoice Date	Sales Order	Invoice Account	VAT Number	Customer Referenz	Net
3	de-at	Artikel	Beschreibung	Menge	Einheit	Preis	Gesamt	Steuer	Rechnung	Rechnungsdatum	Verkaufsauftrag	Rechnungskonto	UID Nummer	Kundennummer	Net
4															

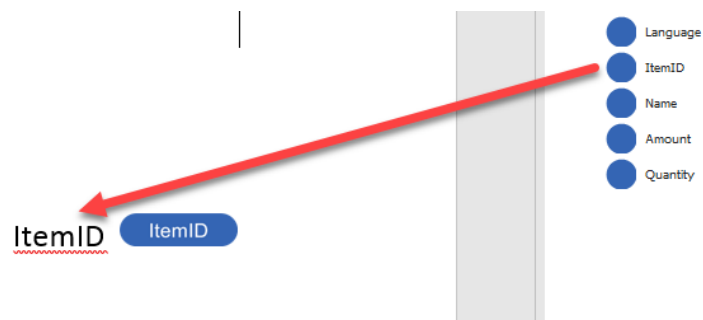
2. The Excel language file is integrated to the Data Map the same way as the connection file
 - a. Click on the button "Excel Data Source"
 - b. Name the file and use the DocPath
 - c. Mark the checkbox "First Row of selected Range contains Column Names"
 - d. Click on the button with the three dots and select the data like in the picture below.



Filter the Excel language file like in the picture below.



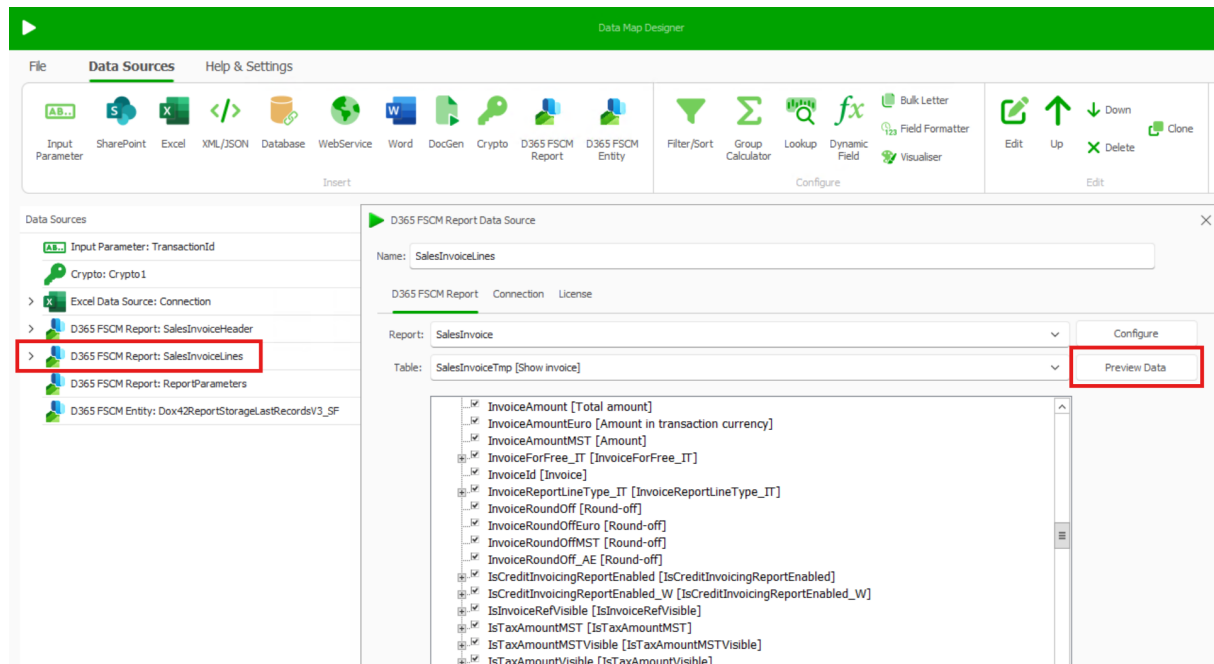
Change the hard-coded text label in the report with the label placeholder.



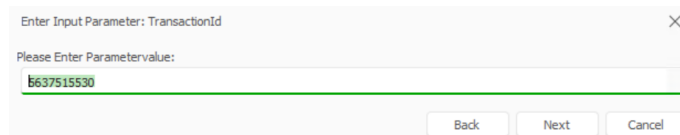
6.3 Display the tax groups in a sales invoice

This chapter will describe how to display the tax groups on the sales invoice. Therefore, its needed to look at the data which are sent by D365 FSCM to dox42. This is possible with the button “Preview data”.

1. Take a look at the data last printed
 - a. Double click on the Data Source, tab “D365 FSCM Report” (“D365 FO Report” or “Dynamics 365 for Operations” in previous versions)



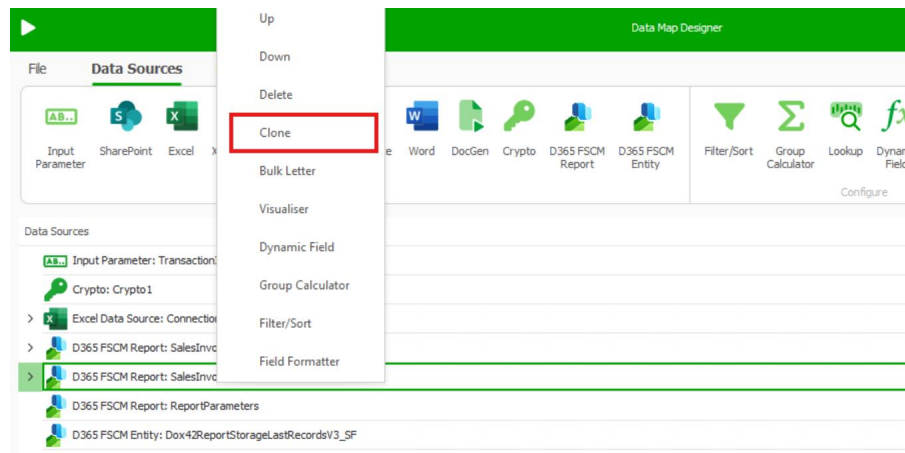
- b. Click the button “Preview Data” and then click the button “next”. The data of the next report will be shown.



- c. Look for the field which contains the tax group

2. Clone the Data Source

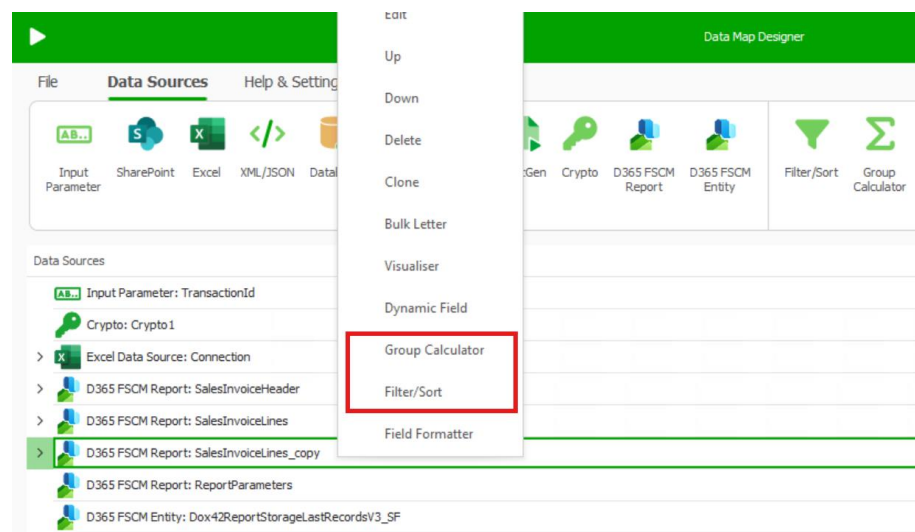
a. Right click on the Data Source



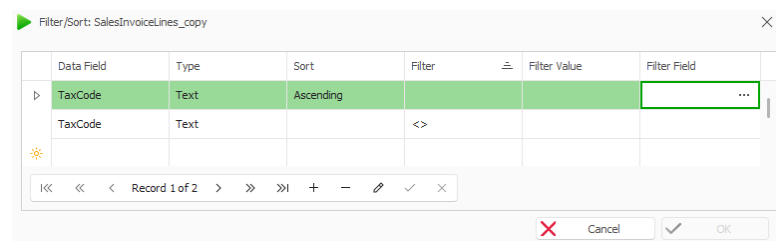
The reason why the Data Source have to be cloned is, that a special filter is needed which will then only displays the tax groups.

3. Filtering the Data Source

a. Right click on the Data Source, select the "Filter/Sort" button



b. Insert the values which are shown on the picture below. The "<>" stands for the filter value of "not empty".



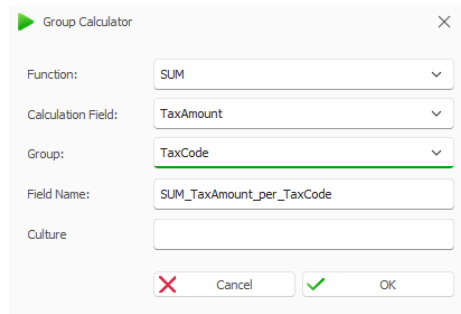
PICTURE 1: SETUP THE FILTER OF THE DATA SOURCE

4. Create a group calculator to sum up the amount of every tax group

a. Right click on the Data Source

b. Select the group calculator

c. Insert the values like in the picture below



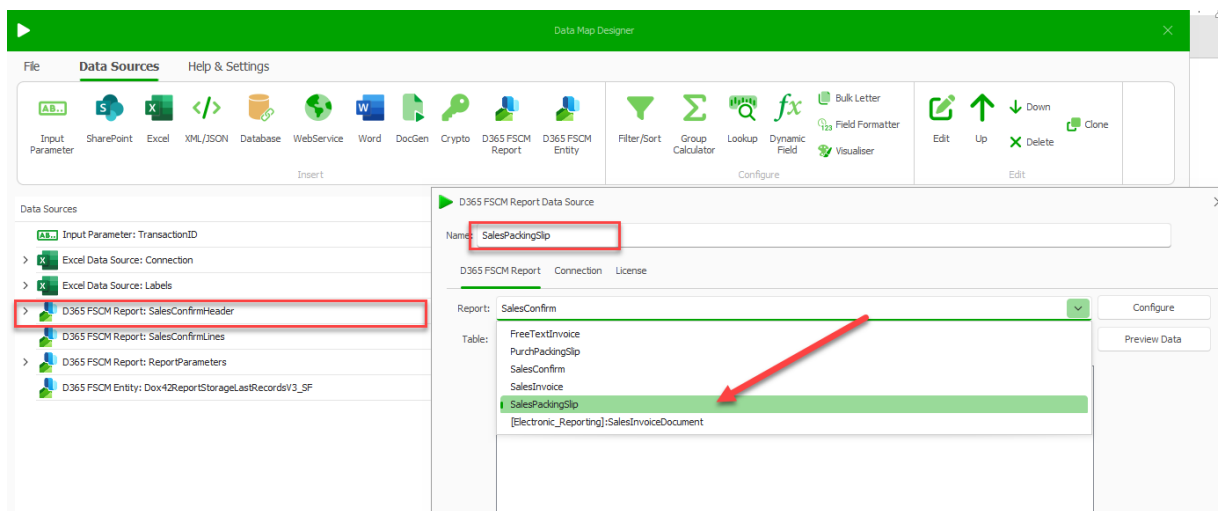
Group Calculator dialog box configuration:

- Function: SUM
- Calculation Field: TaxAmount
- Group: TaxCode
- Field Name: SUM_TaxAmount_per_TaxCode
- Culture: (empty)
- Buttons: Cancel, OK

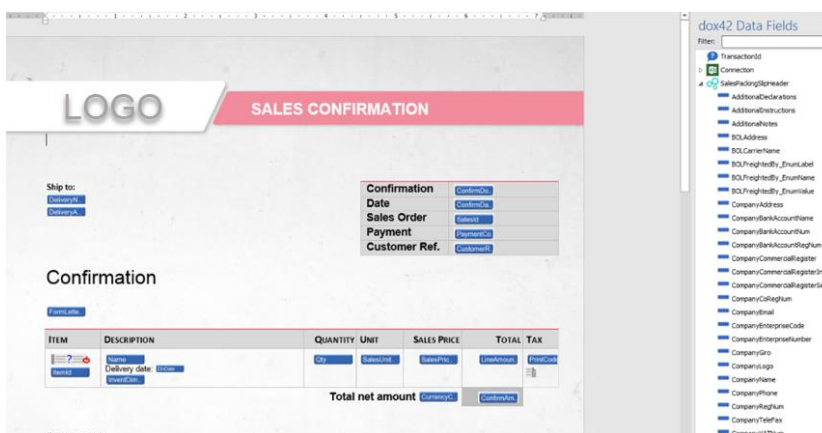
6.4 Reuse a layout for a different report

This chapter is an illustration on how easy it is to adapt e.g. a sales confirmation to a packing slip.

1. Copy the template and the Data Map
2. Change the Data Sources of the template



3. Replace the components from the sales confirm with the components of the sales packing slip components



4. Redefine the layout of the template

6.5 Additional table to existing form letter reports

Typically, form letter reports are using the Preprocessing logic in their data providers, extending the `SrsReportDataProviderPreProcess` class. Example – `SalesPackingSlip`:

```

/// <summary>
/// The <c>SalesPackingSlipDP</c> class is the report Data Provider class
/// <c>SalesPackingSlip</c> Microsoft SQL Server Reporting Services report.
/// </summary>
[SRSReportParameterAttribute(classStr(SalesPackingSlipContract))]
public class SalesPackingSlipDP extends SrsReportDataProviderPreProcess
{

```

As one result of this, all changes in temporary data source tables in the data provider class should be carried out with a separate database connection – just as in standard code.

This separate database connection object is defined in the preprocessing base class and is used by the standard code for each report table. Example – `SalesPackingSlip`:

```

SalesPackingSlipDP
874    /// </param>
875    /// <returns>
876    /// The initialized <c>SalesPackingSlipDetailsTmp</c> sales packing slip line record.
877    /// </returns>
878    protected SalesPackingSlipDetailsTmp initializeSalesPackingSlipLine(
879        SalesPackingSlipHeaderTmp _salesPackingSlipHeaderTmp,
880        SalesPackingSlipDP PackingSlipLineQuerySelection _packingSlipLineSelection)
881    {
882        const RefTableId CustPackingSlipTransTable = 1;
883
884        SalesPackingSlipDetailsTmp salesPackingSlipTmp;
885
886        this.setTransactionConnection(salesPackingSlipTmp);
887
888        salesPackingSlipTmp.clear();
889

```

If this concept is not used for extensions to the data providers, several issues (especially around locking) can arise.

7 Advanced dox42 features

7.1 Generate report on a specific dox42 server

Report-specific dox42 server

It is possible to assign the dox42 server on the report level. To override the default setup and define the dox42 server where the report should be generated, click the button “Server setup” for the report needed:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view ▾
dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails

Report setup
+ New Delete Report setup Archive setup **Server setup** SharePoint mapping Attachments Audit log Document management Print c

	Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...
<input type="checkbox"/>	<input checked="" type="checkbox"/>		SalesConfirm	ReportCZ	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CNMF	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SYAA	SalesConfirm		Generat...	0	Per...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SYHK	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	us01	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	USMF	SalesConfirm		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Assign the dox42 server which should be used to generate the report:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Save + New Delete Options

Server setup | FREETEXTINVOICE : REPORT
Standard view ▾

Filter

	Company	Language	Design	Title	dox42 server
<input checked="" type="checkbox"/>	▼	▼			Default ▼

User-specific dox42 server

It is possible to assign the dox42 server to a specific user. If this assignment is done, then the system will ignore the default dox42 server assignment and the dox42 server assignment on the report level. The user-specific assignment has the highest priority to find the dox42 server to generate the report (it is valid for reports as well as for data entities).

Standard view ▾
dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails
Custom print destinations
Print destination extensions

User options
+ New Delete

	User ID	Show report name in infolog	Show electronic reporting format name in inf...	Show data entity name in infolog	dox42 server
	Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Default1 ▾
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

7.2 Archiving of documents

D365 FSCM provides the feature to archive a dox42 report, in folders or on SharePoint.

Archiving means to save a report to an additional destination to have the original printout available in the future. E.g. if a document is usually not required on paper, it can be printed to the screen and additionally archived as a file.

There are two ways to archive a dox42 report, both are described below.

Note: If an XML file with special character is archived, these special characters must be replaced. A dynamic field provides the functionality to replace these special characters. Insert the following in the dynamic field:

```
<datasource>.<field>.Replace("&", "&amp;").Replace("<", "&lt;").Replace(">", "&gt;").Replace(""", "&quot;").Replace("'", "&apos;")"
```

The result is illustrated in the picture below:

Dynamic Field

Name: NameOfTheDynamicField

Visual Basic Code:

```
result = <datasource>.<field>.Replace("&", "&amp;").Replace("<", "&lt;").Replace(">", "&gt;").Replace(""", "&quot;").Replace("'", "&apos;")"
```

How to create a dynamic field is described in the chapter "Advanced dox42 features".

7.2.1 Folder (File Server)

This part describes how to archive reports in the background in different formats in a folder while posting a e.g. a sales invoice. Switch to the dox42 parameters and mark the report which should be archived. Click on the button “Archive setup”.

Standard view ▾

dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails
Custom print destinations
Print destination extensions

Report setup

+ New Delete Report setup **Archive setup** Server setup SharePoint mapping Attachments Audit log Document management Print destination ex

	Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sender
<input type="checkbox"/>	<input type="checkbox"/>		FreeTextInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Giro		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		ProdJobCard		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		ProdPicklist		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		PurchPackingSlip		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		RetailLabel		GenerateDo...	0	Periodic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		RetailLabel	A4Landscape...	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		RouteOpr		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SalesConfirm	ReportCZ	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	USMF	SalesInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SalesPackingSlip		Generat...	0	Per...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		TrvExpense		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Create a new line in the “Archive setup” by clicking on the button “new”.

The field “Sequence” determines which archiving setup will be executed first.

Dynamics 365 ▾ Finance and Operations System administration > Setup > dox42 >

Save + New Delete Printer setup OPTIONS

ARCHIVE SETUP | SALESINVOICE

Filter

✓	C...	L...	D...	Ti...	Sequence	Template name
					1	
<input checked="" type="checkbox"/>					2	
					3	

Note: It is always an advantage to have the XML-file also, it is created the same way., but make sure the ranking of the lines is right. The ranking is determined with the sequence number in the picture. The PDF-file should always be the first row.

Insert the path of the template.

Dynamics 365 ▾ Finance and Operations System administration > Setup > dox42 > dox42 parameters

Save + New Delete Printer setup OPTIONS

ARCHIVE SETUP | SALESINVOICE

Filter

✓	Company	Language	D...	Title	Sequence	Template name	Print destination
<input checked="" type="checkbox"/>						C:\dox42Server\templates\TEST\SalesInvoice.docx	dox42: Screen
						C:\dox42Server\templates\TEST\SalesInvoice.docx	dox42: SharePoint (https://co

Click on the button “Printer setup” and select from the drop-down menu “Print medium” the “File server”.

Print destination settings

dox42

Save in print archive?
No ☐

Print medium
File server ▼

File name

File format
PDF ▼

Insert the path of the storage folder and add at the end of the path, how the file should be named, e.g.:

C:\dox42Server\templates\TEST\SalesInvoice\Storage\Invoice <%SalesInvoiceLines.InvoiceID%>

The field “File format” defines in which format the file will be saved. Click on the button “ok”.

Scroll to the right and set up the fields “Archiving enabled” and “Archiving field name” as followed:

- If “Archiving enabled” is set to “No”, then the archiving action is inactive, skipped and not used.
- If “Archiving enabled” is set to “Yes”, then the report will be unconditionally archived.
- If “Archiving enabled” is set to “Depending on the field value (metadata)” then D365 FSCM will check the report data source field value specified in the field “Archiving field name”. For example, when only posted sales invoices should be archived (when the invoice number is not empty), the setup may look like this:

Archiving enabled	Archiving field name
Depending on the field value (metadata) ▼	SalesInvoiceTmp.InvoiceId

There is no “<% %>” required because the value is processed via D365 FSCM according to the report metadata structure and not via dox42. Strictly only one report data source field can be specified as the parameter, any other conditions or expressions are not allowed in the setup. The archiving action is only then executed when the specified data source field has a value, and it is skipped when the data source field value is empty (null value based on the field type).

- If “Archiving enabled” is set to “Depending on the field value (template)” then D365 FSCM will check the dox42 template field value specified in the field “Archiving field name”. Any dox42 template field from the report template can be used to set up an archiving condition. For example, when only invoices with the invoice amount greater than 100 in the company currency should be archived, the setup may look like this:

Data Sources

AB...	Input Parameter: TransactionID
	Crypto: Crypto1
>	Excel Data Source: Connection
>	D365 FSCM Report: SalesInvoiceHeader
✓	D365 FSCM Report: SalesInvoiceDetails
	Group Calculator: SUM_InvoiceAmountMST
	Dynamic Field: IsArchivingEnabled_Action1
	Dynamic Field: IsArchivingEnabled_Action2
	D365 FSCM Entity: Dox42ReportStorageLastRecordsV3_SF

Dynamic Field

Name:

Visual Basic Code:

```

if SalesInvoiceDetails.SUM_InvoiceAmountMST > 100 then
' Return any string to archive
result = "SendToArchive"
else
' Return an empty string to avoid archiving
result = ""
end if

```

Archiving enabled	Archiving field name
Depending on the field value (template)	<%SalesInvoiceDetails.IsArchivingEnabled_Action1%>

There is "<% %>" required because the field placeholder is processed via dox42. Strictly only one template field can be specified as the parameter, any other conditions or expressions are not allowed in the setup. The archiving action is only then executed when the specified template field has a value, and it is skipped when the field value is empty. **It is important that all template fields are considered as text fields in this mode, so only an empty string is treated as an empty template field value.**

Set the checkbox "Asynchronous archiving" to "Yes" if you like this archiving setup to be executed asynchronously. This feature can speed up processing for the user in some scenarios (e.g., printing on screen). Otherwise, the archive action is processed sequentially, and the report generation process is waiting for the archiving action to be executed.

Note: Asynchronous archiving is only applied when it is activated in the global parameters:

Standard view ▾
dox42 parameters

General

Global parameters

TEMPLATES
Operation
GenerateDocument ▾

REPORT ARCHIVE
Enable asynchronous archiving
☒ Yes

DATA ENTITIES
Multiselection type
Many records - one report ▾

DOCUMENT ROUTING
Document routing mode
TIFF to EMF ▾

Servers

Users

Reports

Data entities

Printers

7.2.2 SharePoint

There is also the possibility to archive reports on the SharePoint, the required setup is described in the SharePoint setup section.

7.3 Signing pdf documents

There is possibility to sign dox42 pdf reports with digital signature.

The description of how you can setup the signature you can find in Adobe Acrobat documentation:

<https://helpx.adobe.com/acrobat/using/certificate-based-signatures.html>

In dox42 parameters you need to activate checkbox "sign pdf" for your report or Entity data source.

Report:

dox42 parameters

General

Users

Reports

Data entities

Printers

Emails

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Synchronize

Report	Design	Maxim...	Cleanup	Show SS...	Meta...	Synchroni...	Sender type	Ema...	Email sending mode	SharePoint...	Sha...	SharePoint f...	SharePoint map...	Serialization type	Sign PDF
Report															
CustBasedata			0 Periodic	<input type="checkbox"/>		<input checked="" type="checkbox"/>	Fixed	Eliz...	D365 Server	_test	v1...	<%CustBa...	Cust Base Dat...	Web service (compatibility...	<input checked="" type="checkbox"/>
FreeTextInvoice			0 Periodic	<input type="checkbox"/>		<input checked="" type="checkbox"/>								Web service	<input type="checkbox"/>
ProdPicklist			0 Periodic	<input type="checkbox"/>		<input checked="" type="checkbox"/>								Web service (compatib...	<input checked="" type="checkbox"/>
PurchPackingSlip			0 Periodic	<input type="checkbox"/>		<input checked="" type="checkbox"/>								Web service (compatibility...	<input type="checkbox"/>
RetailLabel			0 Periodic	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>								Web service (compatibility...	<input type="checkbox"/>

Entity:

dox42 parameters

General

Users

Reports

Data entities

Printers

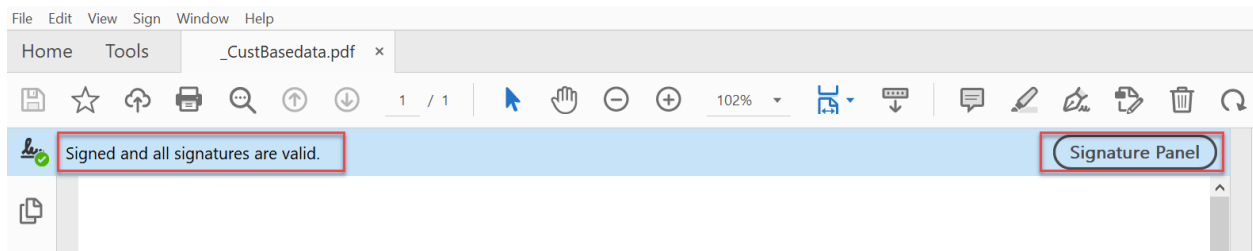
Emails

Data entities setup

+ New Delete Data entity setup SharePoint mapping

Root data entity	Label	Help text	Cleanup	Apply cur...	Apply...	Sender type	Email sender	Email sendi...	SharePoint si...	ShareP...	SharePol...	Shar...	Multiselection	Sign PDF
PurchPurchaseOrderHeaderV2Entity	Purchase orde...		P...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Default	<input type="checkbox"/>
ProjQuotationHeaderEntity	Project quotat...		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Default	<input type="checkbox"/>
VendVendorV2Entity	Vendor SF		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fixed	berta.rater@...	D365 Server	_test				Default	<input checked="" type="checkbox"/>
SalesOrderHeaderV2Entity	Sales order he...		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				SolutionsF...	Entities		Enti...	Many record...	<input type="checkbox"/>
SalesOrderHeaderV2Entity	Sales Order H...		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				SolutionsF...				Many record...	<input type="checkbox"/>
EcoResProductCategoryHierarchyEntity	Product categ...		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Default	<input type="checkbox"/>
SalesQuotationHeaderV2Entity	Sales quotatio...		Perio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Default	<input type="checkbox"/>

When opening the pdf document in Adobe Acrobat, it will be shown that this file is signed and verified, and it will be possible to see the details of whom signed this document.



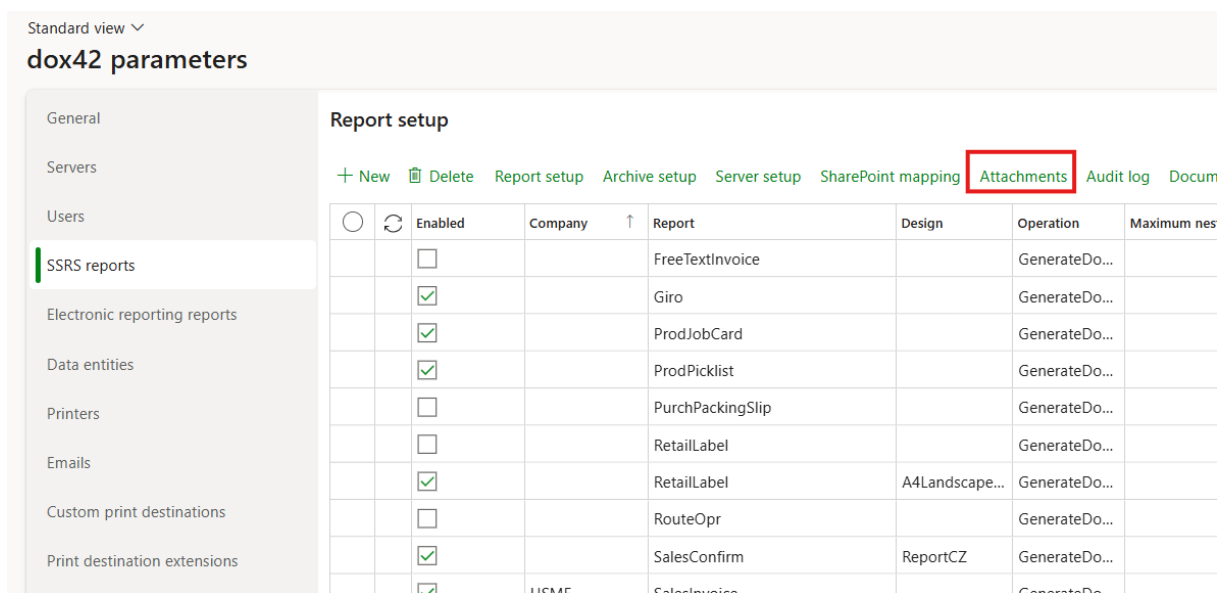
The functionality is available for different print mediums: screen, file, email, file server.

7.4 Attach files to dox42 report

It is possible to attach a document or an image, for example to a sales order in D365 FSCM. This attachment can then be printed on the dox42 report or added to a generated email. To do this, the following setup is needed:

7.4.1 D365 FSCM Setup

- 1- Mark the desired dox42 report and click on the button “Attachments”.



- 2- Create a new attachment and fill out the following fields:
 - a. It is possible to enable and disable an attachment type.
 - b. The related data defines where the attachment will be attached. For example, in this case on the header (to setup the related tables, use the button “Related data”. If there are no records by default, see [FAQ](#)).
 - c. The file type defines the file type of the attachment.
 - d. If the checkbox “Add to report data source” is set to “Yes”, the files will be available in the report data source.
 - e. If the checkbox “Attach to email” is set to “Yes”, the files will be attached to a generated email when using the “Email” printing destination.

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Save + New Delete Related data Options

Filter

File

File
File
Yes

Image

Image
Image
Yes

SALESCONFIRM | Standard view

Attachments

Setup

Enable ☒ Yes Attachment Name Add to report data source ☒ Yes Attach to email ☒ Yes

Related data

Name Related table Report table

Reference

Type

3- Create an attachment.

Finance and Operations | Sales and marketing > Sales orders > All sales orders

USMF

+ New Delete Sales order Sell Manage Pick and pack Invoice Retail General Warehouse Transportation Credit management Options

Credit note Charges Tax Calculate Generate Process Apply Journals Prepayment

Credit note Credit note Maintain charges Allocate charges Sales tax Confirmed delivery dates Multiline discount Total discount Supplementary items Tiered charges Confirmation Pro forma confirmation Event kanbans Service agreement Sales order confirmations Quotation confirmation journal

All sales orders

Standard view

Filter

Sales order	Customer account	Customer name	Order type	Invoice account	Channel	Status	Release status	Do not process	H.L.	Sales taker
001092	IMA1	Maresch AG	Sales order	IMA1		Open order	Open			
001110	US-001	Contoso Retail San Diego	Sales order	US-001		Open order	Open			
001112	RSK02	RSK_Testdebitor_II	Sales order	RSK02		Canceled	Open			
001113	RSK02	RSK_Testdebitor_II	Sales order	RSK02		Open order	Open			
001135	RSK01	RSK_Testdebitor	Sales order	RSK01		Open order	Open			
001136	DE-001	Contoso Europe	Sales order	DE-001		Open order	Open			
001160	RSK02	RSK_Testdebitor_II	Sales order	RSK02		Open order	Open			
001186	Test_III	Test_III	Sales order	Test_III		Open order	Open			
001210	Cust1	CustName	Sales order	Cust1		Invoiced	Open			
001235	US-003	Forest Wholesales	Sales order	US-003		Open order	Open			
001260	US-001	Contoso Retail San Diego	Sales order	US-001		Open order	Open			
001261	US-003	Forest Wholesales	Sales order	US-003		Open order	Open			
001285	DE-001	Contoso Europe	Sales order	DE-001		Open order	Open			
001286	US-001	Contoso Retail San Diego	Sales order	US-001		Open order	Open			
001310	US-001	Contoso Retail San Diego	Sales order	US-001		Invoiced	Open			
001335	DE-001	Contoso Europe	Sales order	DE-001		Invoiced	Open			
001360	DE-001	Contoso Europe	Sales order	DE-001		Open order	Open			

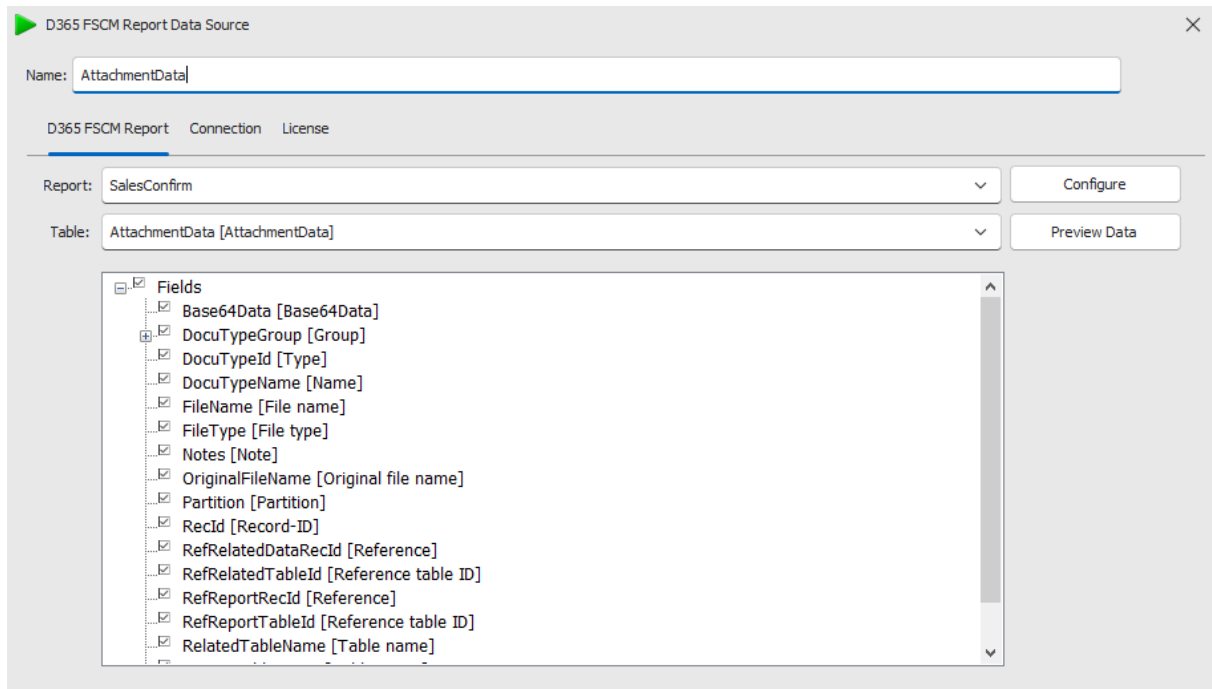
The screenshot shows the Microsoft Dynamics 365 interface. The top navigation bar includes 'Finance and Operations', 'Sales and marketing', 'Sales orders', and 'All sales orders'. The left sidebar contains a list of reports: 'PurchPurchaseOrder.Report', 'dox42_Server_V35_EN', and 'SalesConfirm'. The main area displays the details for the 'dox42_Server_V35_EN' attachment, including its description, type (File), and a preview of the PDF document. The preview shows the dox42 logo and the text 'dox42 Server'.

- 4- If the report is now printed, the attachment will be shown in the dox42 report.



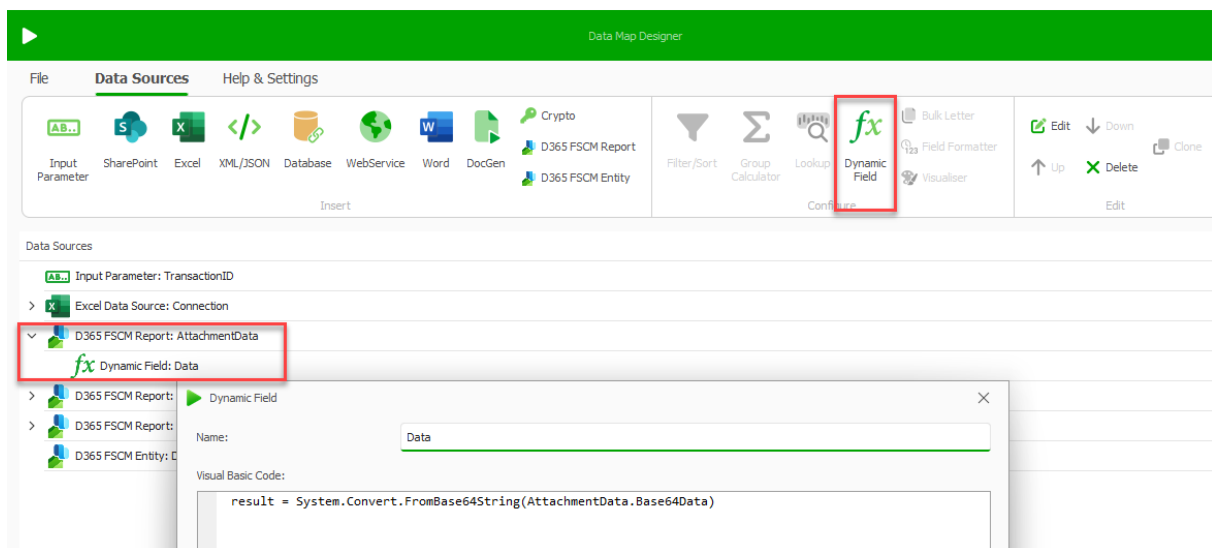
7.4.2 Dox42 setup

A new data source will be available for the report, named "Attachment data".

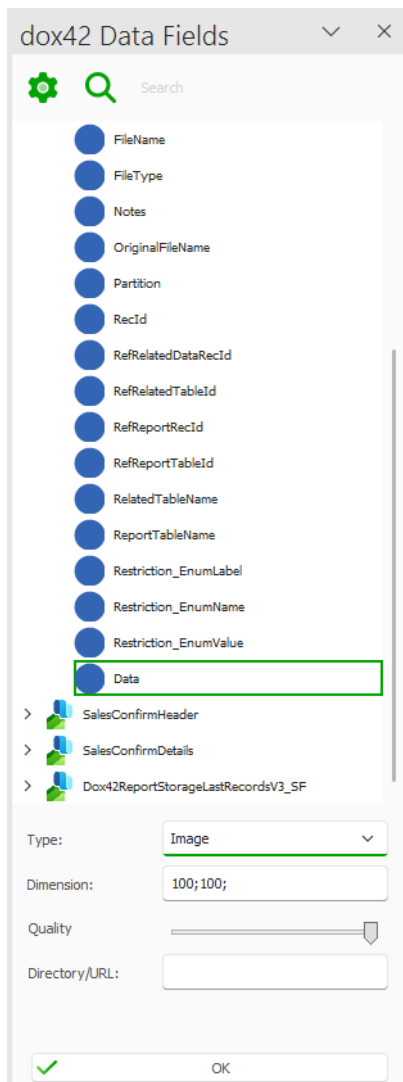


The field "Base64Data" contains the attached file for the report as a Base64 encoded string.

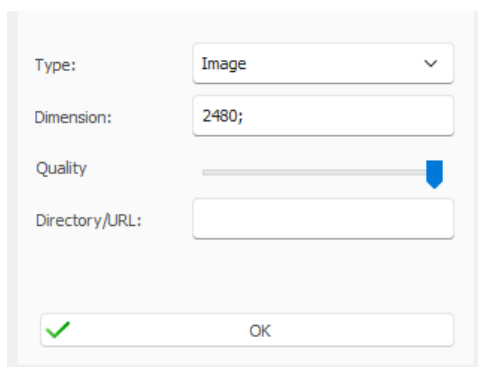
To show the file in the report design, the new dynamic field should be added to the data source as following:



Then, the dynamic field can be handled as a "normal" dox42 field.



The format for the field should be aligned with the report design, for example:



7.5 Save printed report in Document Management

It is possible to save the printed document in D365 FSCM. The printed document can be attached to the record and then can be accessed in D365 FSCM at any time. The following setup is needed:

7.5.1 D365 FSCM Setup

- 1- Mark the desired dox42 report and click on the button "Document management".

Standard view ▾

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities


Printers

Emails

Custom print destinations

Report setup

+ New

 Delete

Report setup

Archive setup

Server setup
































SharePoint mapping

Attachments

Audit log

Document management

Print destination

		Enabled	Company	↑	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sen
				▾	SalesPackingSlip ▾	▾	Generat... ▾	0	Peri... ▾				
					FreeTextInvoice		GenerateDo...	0	Periodic				
					Giro		GenerateDo...	0	Periodic				Fix
					ProdJobCard		GenerateDo...	0	Periodic				
					ProdPicklist		GenerateDo...	0	Periodic				
					PurchPackingSlip		GenerateDo...	0	Periodic				
					RetailLabel		GenerateDo...	0	Periodic				
					RetailLabel	A4Landscape...	GenerateDo...	0	Periodic				

2- Create a new document management record and fill out the following fields:

- It is possible to enable and disable a document management setup record.
- The related data defines where the printed report will be attached. For example, in this case on the header (to setup the related tables, use the button "Related data". If there are no records by default, see [FAQ](#)).

Finance and Operations

SALES PACKING SLIP | Standard view ▼

Related data

Name	Related table	Report table
Sales packing slip	SalesPackingSlipDetailsTmp	SalesPackingSlipDetailsTmp
Show sales packing slip	SalesPackingSlipHeaderTmp	SalesPackingSlipHeaderTmp
Show sales packing slip header	CustPackingSlipJour	SalesPackingSlipHeaderTmp
Show sales packing slip	SalesPackingSlipHeaderTmp	SalesPackingSlipHeaderTmp
Show sales packing slip	SalesPackingSlipPackageDetailTmp	SalesPackingSlipPackageDetailTmp
SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular	SysDocuBrandDetailsRegular

Relations

Relation type	Related table field	Report field	Range	Field type
Normal	Recid	JournalRecid		Int64

- The file type defines the file type of the attachment. It is possible to define different file type for each company.

Finance and Operations

SALES PACKING SLIP | Standard view ▼

Document management

Setup

Enable ☒ Yes 1

Document management: Test

Name: Test example

Attach mode: All 4

Related data

Name: Sales Packing slip header 2

Related table: CustPackingSlipJour

Report table: SalesPackingSlipHeaderTmp

Reference

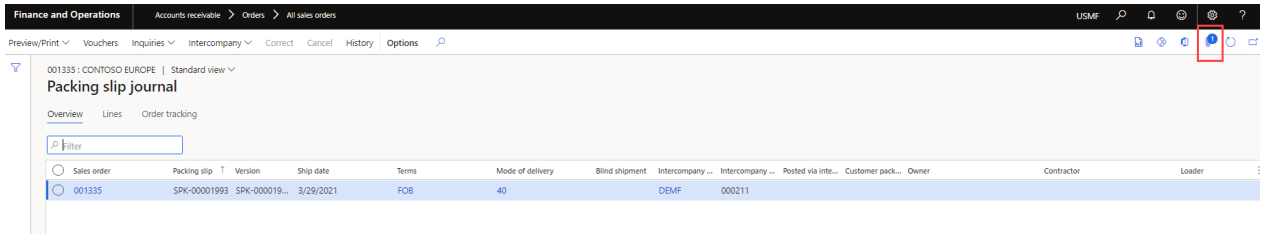
+ New 3 [Delete](#)

<input type="radio"/>	Company	Type
<input checked="" type="radio"/>	INMF	File
<input type="radio"/>	USRT	Image
<input type="radio"/>	USMF	File
<input type="radio"/>	DEMF	Image

- Attach mode defines which printed report will be attached:

- All printed reports will be attached to the record
- Only the first one printed report will be attached to the record
- Only the last one printed report will be attached to the record

3- Print the report. The generated document will be attached to the record and available in document management form.



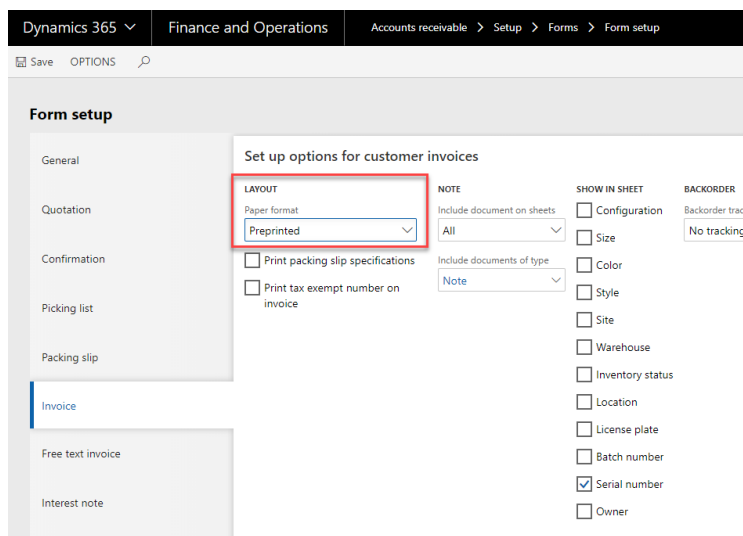
7.6 Printing with and without a blank paper

Often there is a problem with printing on preprinted paper, for example some printing papers contain the logo and some printing papers are blank. It should be decided automatically if the e.g. the logo will be printed on the report or not. D365 FSCM provides the possibility to define on which paper the report should be printed, it is decided by using the parameter "PrePrintLevel_Enum".

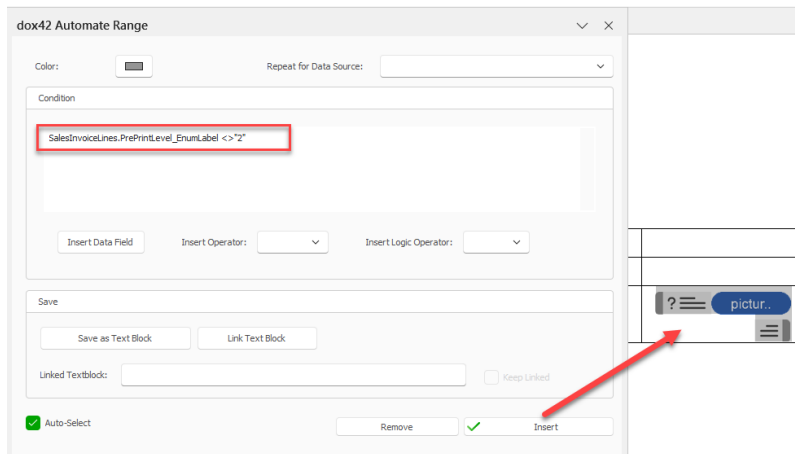
- Blank paper has the value "0"
- Partly preprinted has the value "1"
- Preprinted has the value "2"

Printing the sales invoice on a preprinted paper

1. Click on the module "Accounts receivable" then on the submodule "Setup", in this submodule is the forms setup.
2. Choose the tab "Invoice" and decide on which paper format the invoice should be printed, illustrated in the picture below.



3. Switch to the template and define a condition on the element which should only be printed if the paper is partly printed or blank.



7.7 Creating a Barcode

There is also the option to display the placeholder as a barcode by simple inserting the type "BarCode" in the type-definition field. How the barcode is displayed can be determined in the fields below, an example is illustrated on the picture below.

The dimension of the barcode is determined in the field "Dimension" make sure a ";" is used to separate the dimension numbers.

Type:	BarCode
Dimension:	40;40
Codetext:	Below
Symbology:	QR
Background:	
<input checked="" type="checkbox"/> OK	

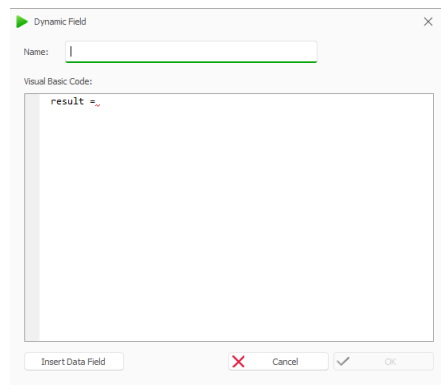
7.8 Dynamic field

A dynamic field in which it is possible to program e.g. some conditions or add a link. The programming language used in the "Visual Basic Code" field is VB.net.

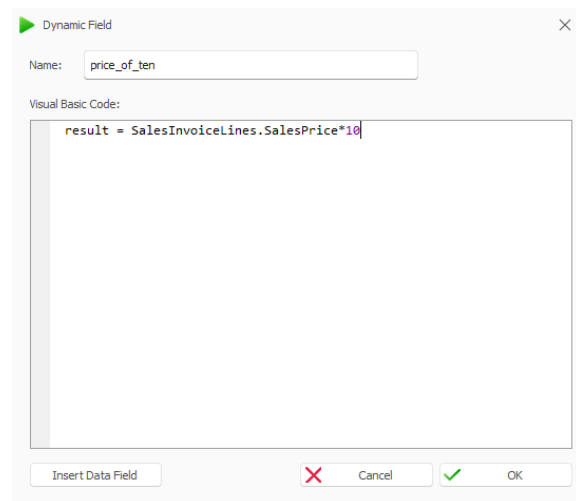
Note: D365 FSCM and dox42 have different rounding setups. D365 FSCM has the standard rounding setup, always using D365 FSCM for business calculations.

1. Creating a dynamic field
 - a. Right click on the Data Source

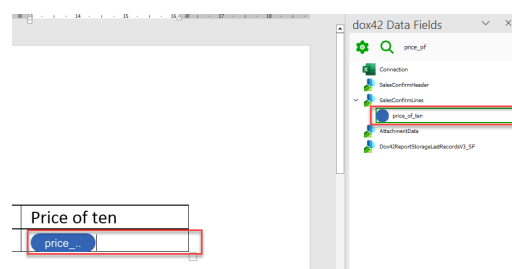
- b. Selecting the field “Dynamic Field”, a window will pop up like displayed in the picture below.



- c. Insert a name. Select a data field from the Data Sources with the button “Insert Data Field” e.g. the sales price and multiple it with 10.



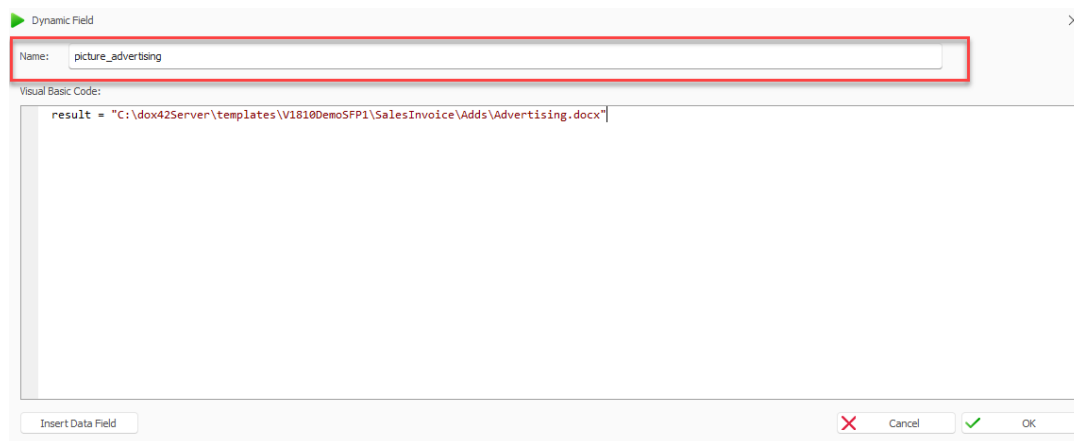
- d. Select the dynamic field from the data box and drag it in the desired place.



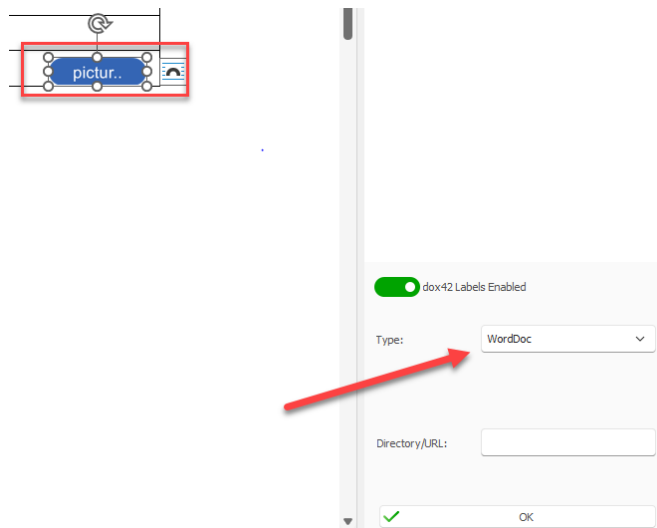
Adding a picture with a dynamic field

1. Create a Word document and add a picture, which should be shown later in the report
2. Copy the link of the path

3. Create a dynamic field. Name it and insert the link of the field



4. Select the dynamic field from the data box and define the type "WordDoc".



A dynamic field is like a normal placeholder, there is for example also the possibility to set conditions.

7.9 Group calculator

It is a feature with provides different kinds of calculations tools.

1. Creating a Group Calculator field
 - a. Right click on a Data Source.

- b. Selecting the desired function for example “COUNT” for counting

- c. Decide which field should be counted.

- d. Insert a field name.

Count the lines of a packing slip

1. Create a group calculator which counts the ItemID
2. Create a second group calculator and insert in the field “Calculation Field” the before created group calculator field like in the picture below.

3. Insert the group calculator field in the desired place on the report.

7.10 Caching printed reports (optional) [BETA]

There is a possibility to reprint already printed documents without generating them newly on the dox42 server. It can significantly speed up the document printing process in some business-critical scenarios.

If the report with the same set of the report parameters has once been printed, this report serialized data and/or generated report files can be taken from the cache when the report is printed next time.

For being able to reprint already printed documents you should open System administration > Setup > dox42 > dox42 parameters and activate the checkbox for the Report/Entity in the column **Cache enabled**.

If you click on **Reset cache** the existing cache will be cleared.

Standard view ▾
dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails
Custom print destinations
Print destination extensions

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Print destination extensions Synchronize **Reset cache** ...

Print folder name	SharePoint file name	SharePoint mapping code	Custom output action	Serialization type	Sign PDF	Cache enabled
testsf1/Customer base d...				Web service	<input type="checkbox"/>	<input checked="" type="checkbox"/>
testsf1/Customer base d...	CustBaseDataRsat			Web service (compatibility mode)	<input type="checkbox"/>	<input type="checkbox"/>
			SaveAction	Web service (compatibility mode)	<input type="checkbox"/>	<input type="checkbox"/>
				Web service	<input type="checkbox"/>	<input type="checkbox"/>
				Web service	<input checked="" type="checkbox"/>	<input type="checkbox"/>
				Web service (compatibility mode)	<input type="checkbox"/>	<input type="checkbox"/>
				Web service (compatibility mode)	<input type="checkbox"/>	<input type="checkbox"/>
				Web service (compatibility mode)	<input type="checkbox"/>	<input type="checkbox"/>
				Web service	<input type="checkbox"/>	<input checked="" type="checkbox"/>
				Web service	<input type="checkbox"/>	<input type="checkbox"/>

Important: This is a beta version of the caching functionality. It is not guaranteed that the caching works properly out of the box for absolutely all the reports (standard or custom). You can test and use this feature at your own risk – but at the same time, using this feature can be very powerful, you can achieve a significant performance boost in your business-critical scenarios where standard performance does not meet your requirements. Nevertheless, the use of standard performance (cache disabled) remains recommended. This feature should only be used as a last resort when all other possible optimizations have already been implemented. If you face issues with this feature getting wrong cached reports, you can check and adjust the report caching key (used to search and extract report serialized data and generated report files from the cache) subscribing to this delegate (development needed):

```

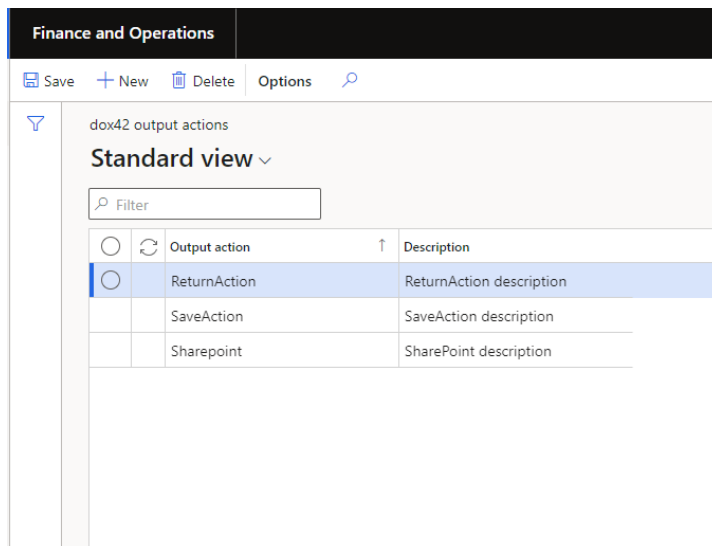
Dox42SerializationDelegates_SF
1 public final class Dox42SerializationDelegates_SF
2 {
3     /// <summary>
4     /// subscribe to this delegate to change cache key
5     /// </summary>
6     /// <param name = "_cacheKeyMap"> map containing cache key components </param>
7     /// <param name = "_reportDataContract"> report contract class </param>
8     delegate void buildReportCacheKey(Map _cacheKeyMap, Object _reportDataContract)
9     {
10     }
11 }
12
13 public void onBuildReportCacheKey(Map _cacheKeyMap, Object _reportDataContract)
14 {
15     this.buildReportCacheKey(_cacheKeyMap, _reportDataContract);
16 }
17
18 private void new()
19 {
20 }

```

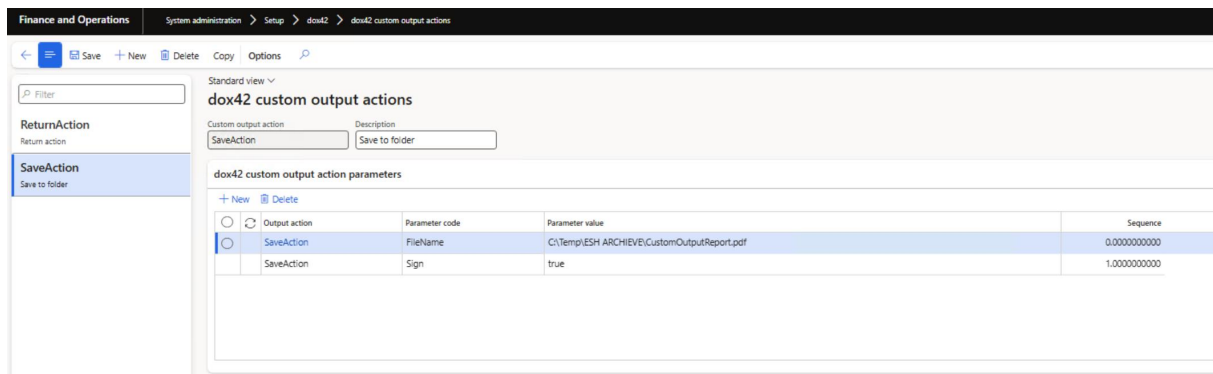
7.11 Custom report print destinations

In the form "dox42 output actions" you can add all the output actions you need and supported by the dox42 server (System administration > Setup > dox42 > dox42 output actions).



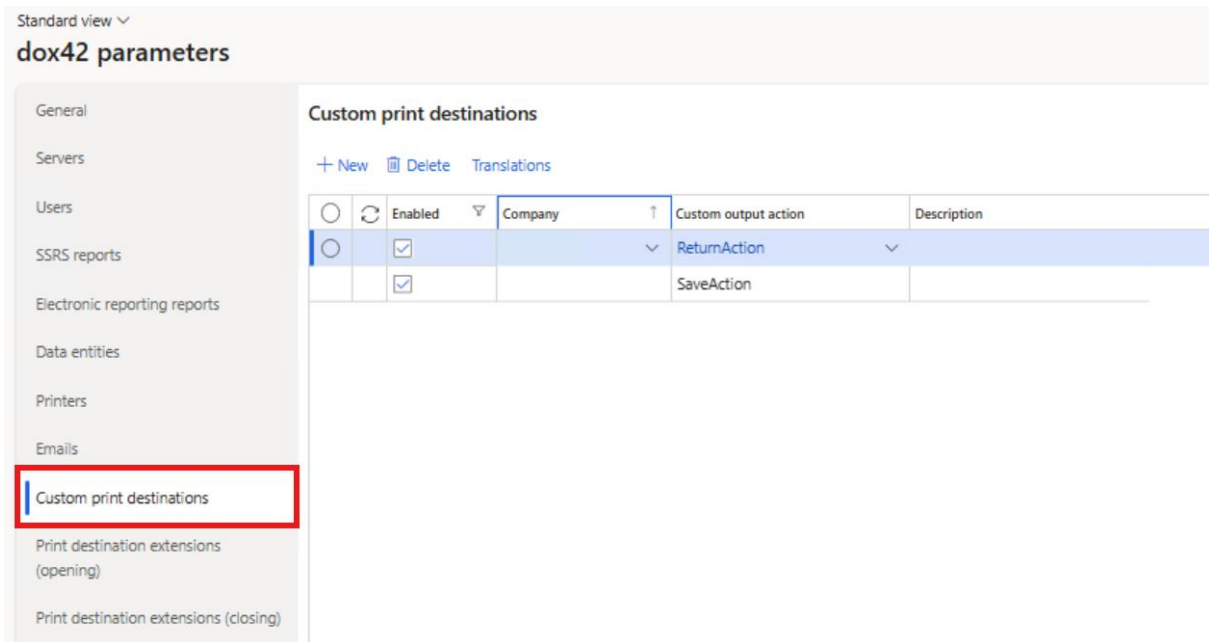


In the form “dox42 custom output actions” you can create your own custom output actions combining necessary output actions, their parameter codes and parameter values as well as their sequence (System administration > Setup > dox42 > dox42 custom output actions).



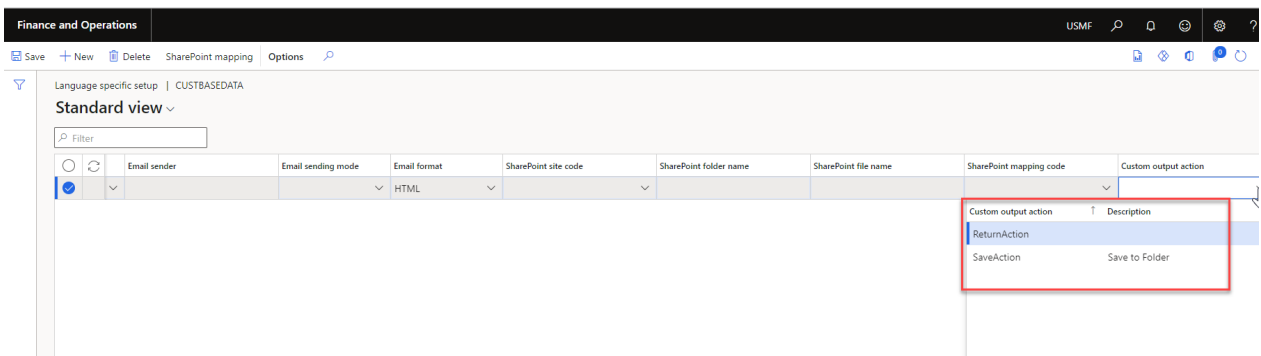
7.11.1 Custom print destinations

Afterwards, you can set up your custom print destinations globally, which will be available to be selected for all printed Reports/Entities (System administration > Setup > dox42 > dox42 parameters).



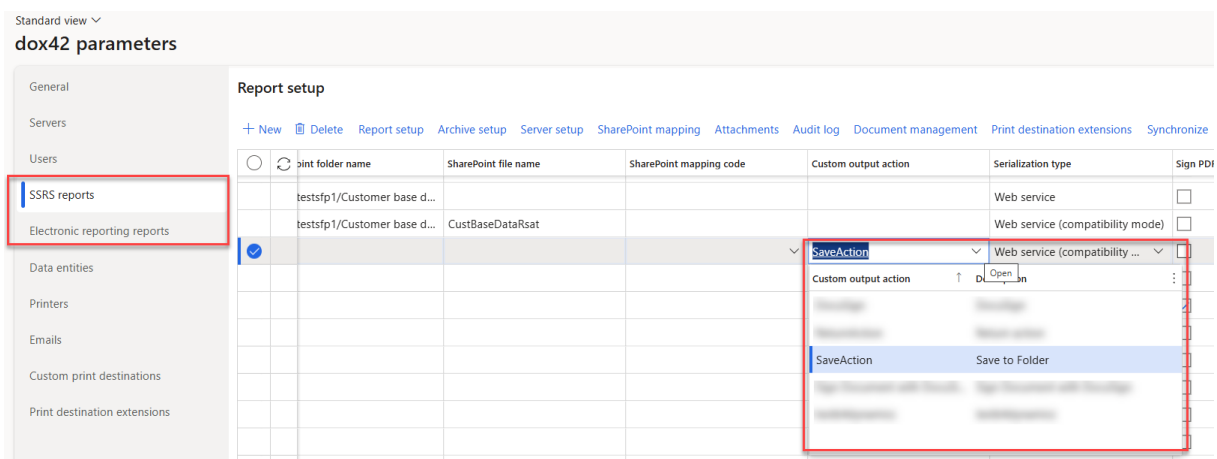
Default custom output action values can be set up on the "Report setup"/"Data entity setup" level as well as on the global Report/Entity level. It will be used when the custom output action is not specified while running reports.

"Report setup"/"Data entity setup" level:



Global SRSS Report/Electronic reporting/Entity level:

SRSS Report/Electronic reporting:



Entity:

Standard view ▾
dox42 parameters

General
Servers
Users
SSRS reports
Electronic reporting reports
Data entities
Printers
Emails
Custom print destinations
Print destination extensions

Data entities setup
+ New Delete Data entity setup Translations SharePoint mapping Print destination extensions Reset cache

SharePoint site code	SharePoint folder...	SharePoint file name	SharePoint mapping code	Custom output action	Multiselection type	Sign PDF	Cac
<input checked="" type="checkbox"/>				SaveAction	Default	<input type="checkbox"/>	<input type="checkbox"/>
				Custom output action	Description		
	_test	v1810testsf1/...					<input checked="" type="checkbox"/>
	SolutionsFactory SharePoint ONLINE	Entities	Entity map				<input type="checkbox"/>
	SolutionsFactory SharePoint ONLINE						<input type="checkbox"/>

Custom output action SaveAction Save to Folder

Default

For example, you setup for your report Custom output action “SaveAction” (as in screenshots above). That means that when you choose for the report print destination “Custom”, the report will be saved to the folder and signed.

Moreover, you can use custom print destination for “Archive setup”. You will need to do a standard setup for archiving, choose “Custom” as print medium and select appropriate custom output action.

Finance and Operations System administration > Setup > dox42 > dox42 parameters

Archive setup | SalesConfirm
Standard view ▾
Filter

Sequence	Operation	Template name
1	GenerateDocument	C:\dox42Server\templates\V1810TestSFP1\RSAT tests\SalesConfirm_RSAT\SalesConfirm_RSAT.docx

My view ▾
Print destination settings
dox42 Save in print archive? No

Print medium Custom
Custom output action SaveAction

7.11.2 Print destination extensions

Print destination extensions allow you to set up custom output actions which will be applied additionally to the main print destination the report is printed to. Print destination extensions are applied in the order according to the “Sequence” field until the record with the activated checkbox “Stop search” is found. You can add your print destination extensions on a global level applying it for all printed Reports/Entities as well as you can do the setup per each Report/Entity.

Global Report/Entity level:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions (opening)

Print destination extensions (closing)

Print destination extensions (opening)

+ New Delete

Enabled	Company	Custom output action	Sequence	Stop search	Has conditions	Print medium
<input checked="" type="checkbox"/>		SaveAction	1.0000000000	<input type="checkbox"/>	<input type="checkbox"/>	Any

The opening print destination extensions will be executed before the main print destination (the report is run with), closing – after the main print destination. To limit the use of the print destination extension, choose the checkbox “Has conditions” and set up the main print destinations applicable for this print destination extension:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters

Standard view

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions (opening)

Print destination extensions (closing)

Print destination extensions (opening)

+ New Delete

Enabled	Company	Custom output action	Sequence	Stop search	Has conditions	Print medium
<input checked="" type="checkbox"/>		SaveAction	1.0000000000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Printer;Email

Setup per Report/Entity:

Standard view

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions

Report setup

+ New Delete Report setup Archive setup Server setup SharePoint mapping Attachments Audit log Document management Print destination extensions synchronize

Enabled	Company	Report	Design	Operation	Maximum nest...	Cleanup	Sho...	M...	Syn...	Sender type	Email
<input checked="" type="checkbox"/>	USRT	AgreementConfirmation		GenerateDo...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	GLSI	AgreementConfirmation		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	THMF	AgreementConfirmation		GenerateDo...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	USMF	AgreementConfirmation		GenerateDo...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Current user	
<input type="checkbox"/>	USMF	BankPaymAdviceVend	Report	GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	USMF	BankPaymAdviceVendV2	Report	Generat...	0	Peri...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	USMF	CustAccountStatementExt		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SYAA	CustCollectionJour		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	USMF	CustCollectionJour		GenerateDo...	0	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/>		FreeTextInvoice		GenerateDo...	0	Periodic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions

Report setup

+ New Delete Report setup Archive setup Server setup **Print destination extensions** Synchronize Delete metadata

	Enabled	Company	Configuration	Operation	Cleanup
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		* v	GenerateDocument	Periodic

Standard view v

dox42 parameters

General

Servers

Users

SSRS reports

Electronic reporting reports

Data entities

Printers

Emails

Custom print destinations

Print destination extensions

Data entities setup

+ New Delete Data entity setup Translations SharePoint mapping **Print destination extensions** Reset cache

	Enabled	Company	Root data entity	Label
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		SalesOrderHeaderV2Entity	Sales order headers V2
	<input checked="" type="checkbox"/>		ProjQuotationHeaderEntity	Project quotation headers
	<input checked="" type="checkbox"/>		VendVendorV2Entity	Vendors V2
	<input checked="" type="checkbox"/>		SalesOrderHeaderV2Entity	Sales order headers V2
	<input checked="" type="checkbox"/>		SalesOrderHeaderV2Entity	Sales Order Headers v2 Test
	<input checked="" type="checkbox"/>		EcoResProductCategoryHierarchyEntity	Product category hierarchies
	<input checked="" type="checkbox"/>		SalesQuotationHeaderV2Entity	Sales quotation headers V2
	<input checked="" type="checkbox"/>	USMF	VendVendorV2Entity	Vendors V2 - RSAT (do not use!)
	<input checked="" type="checkbox"/>		ProjectEntity	Projects

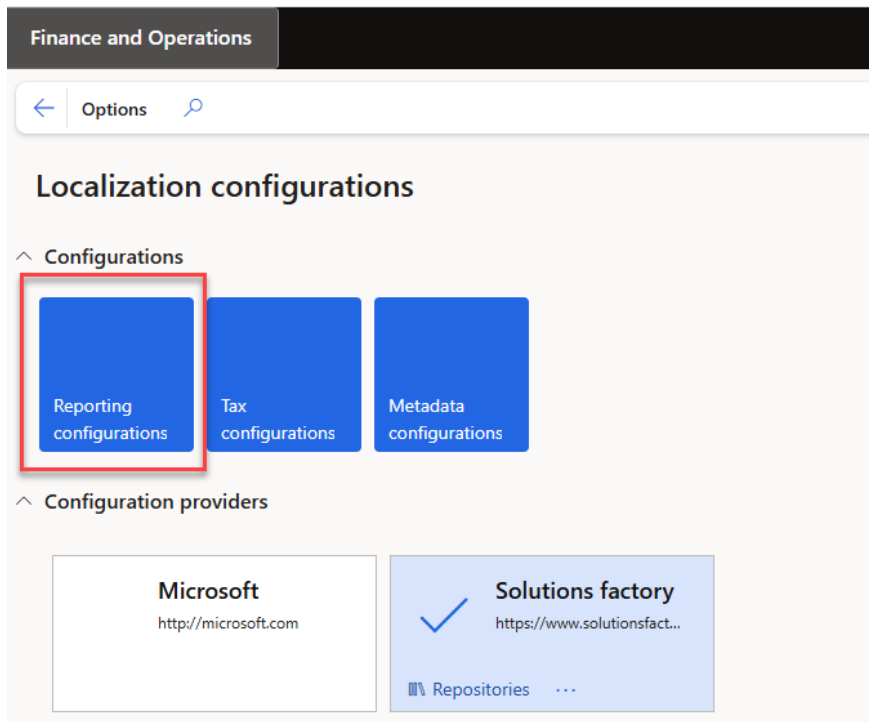
For example, you set up for your report Print destination extension with SaveAction (as in screenshots above). That means that when you choose for the report print destination "Printer", the report will be sent to a printer and additionally saved to the folder and signed. Moreover, saving to the folder will be performed before or after sending to a printer depending on whether this print destination extension is opening or closing.

7.12 Electronic reporting integration

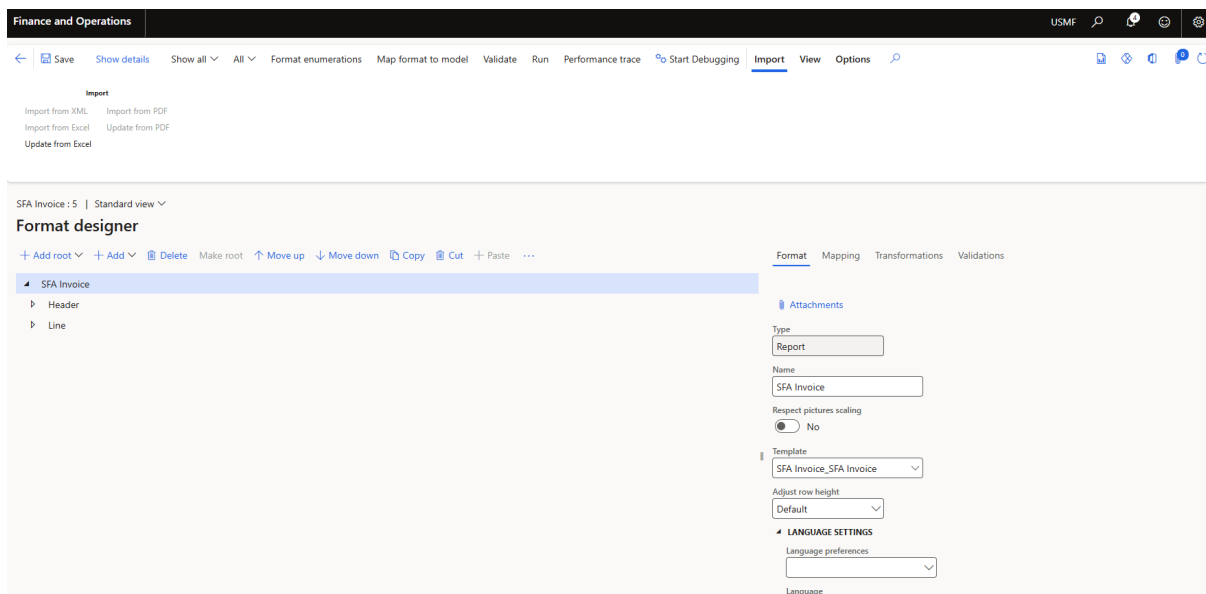
There is a possibility of building the dox42 report on top of Electronic reporting (ER). It gives you an advantage of using Electronic reporting capabilities instead of programming new fields in the data provider of the SSRS report.

7.12.1 D365 FSCM Setup

For setting up the template, you first need to create an Electronic Reporting configuration or use an existing one:



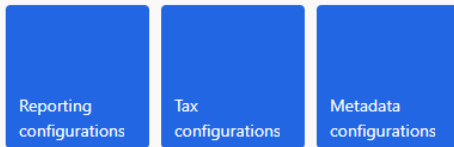
We recommend using Excel format in ER format designer for transferring report data to dox42 as in the demo example following:



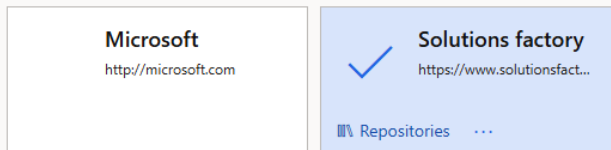
For the configuration that you've created you will need to setup Electronic Reporting destination:

Localization configurations

^ Configurations



^ Configuration providers



^ Related links

APP LINKS

[Legal entity filter for formats](#)[Configuration providers](#)[Electronic reporting destination](#)[Electronic reporting source](#)[Electronic reporting parameters](#)[Functional/Feature area tags](#)[Industry tags](#)

Filter

Standard view

Electronic reporting destination

Reference	
<input type="text"/>	
Name	Configuration
ISO20022 Credit transfer (AT)	ISO20022 Credit transfer (AT)
ISO20022 Credit Transfer format	ISO20022 Credit transfer
ISO20022 Direct debit (DE)	ISO20022 Direct debit (DE)
ISO20022 Direct debit format	ISO20022 Direct debit
Journals XML MX	Journals XML MX
Sales invoice (Excel)	Sales invoice (Excel)

File component name

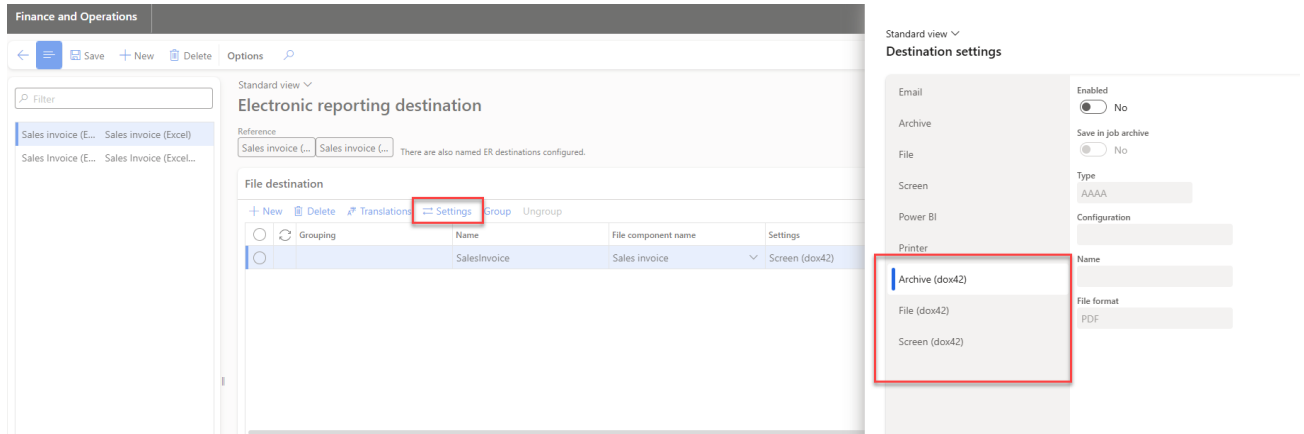
Settings



We didn't find anything to show here.

In settings there will be available three dox42 destinations:

- Archive (dox42)
- File (dox42)
- Screen (dox42)



Standard view

Electronic reporting destination

Reference: Sales invoice (...) Sales invoice (...). There are also named ER destinations configured.

File destination

	Name	File component name	Settings
<input type="radio"/>	Grouping		
<input type="radio"/>	SalesInvoice	Sales invoice	Screen (dox42)

Destination settings

Email: Enabled No

Archive: Save in job archive No

File: Type AAAA

Screen: Configuration

Power BI: Name

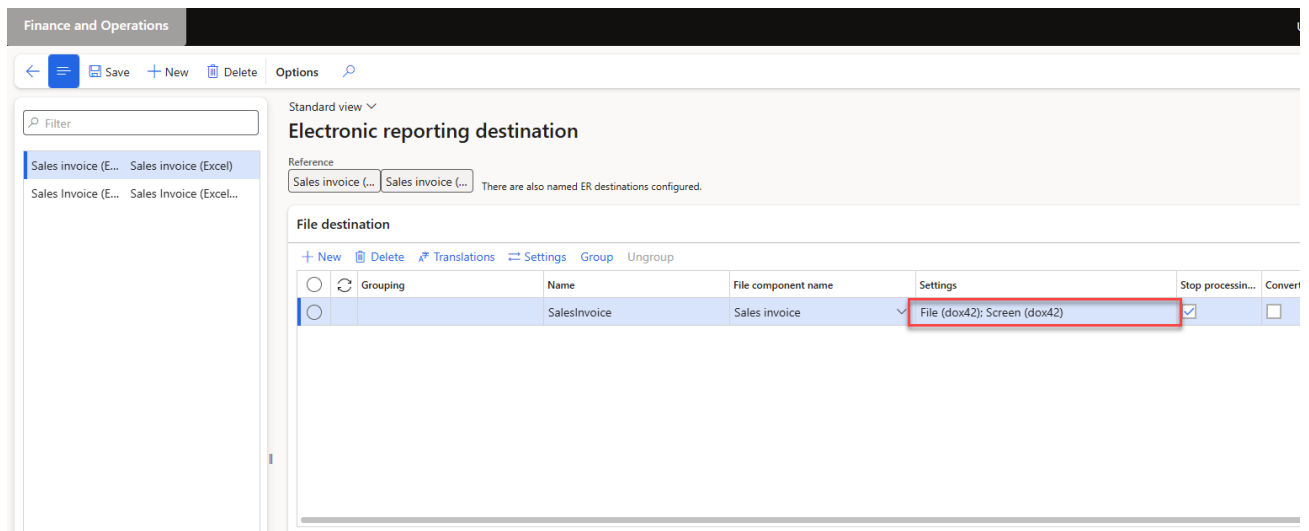
Printer: File format PDF

Archive (dox42)

File (dox42)

Screen (dox42)

In contrast with SRSS reports, for ER reports you are able to select several print destinations at once:



Standard view

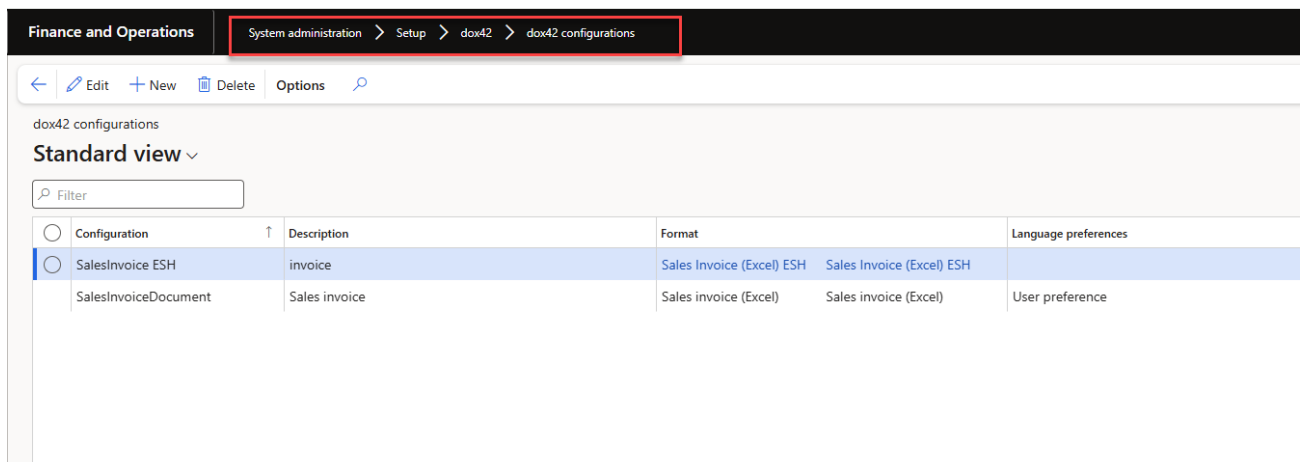
Electronic reporting destination

Reference: Sales invoice (...) Sales invoice (...). There are also named ER destinations configured.

File destination

	Name	File component name	Settings	Stop processin...	Convert
<input type="radio"/>	Grouping				
<input type="radio"/>	SalesInvoice	Sales invoice	File (dox42): Screen (dox42)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

There is a special form "dox42 configurations" for setting up configuration for the report (System administration => Setup => dox42 => dox42 configurations): in this form you need to create new dox42 configuration and match it with ER configuration (column "Format"):



Finance and Operations

System administration > Setup > dox42 > dox42 configurations

dox42 configurations

Standard view

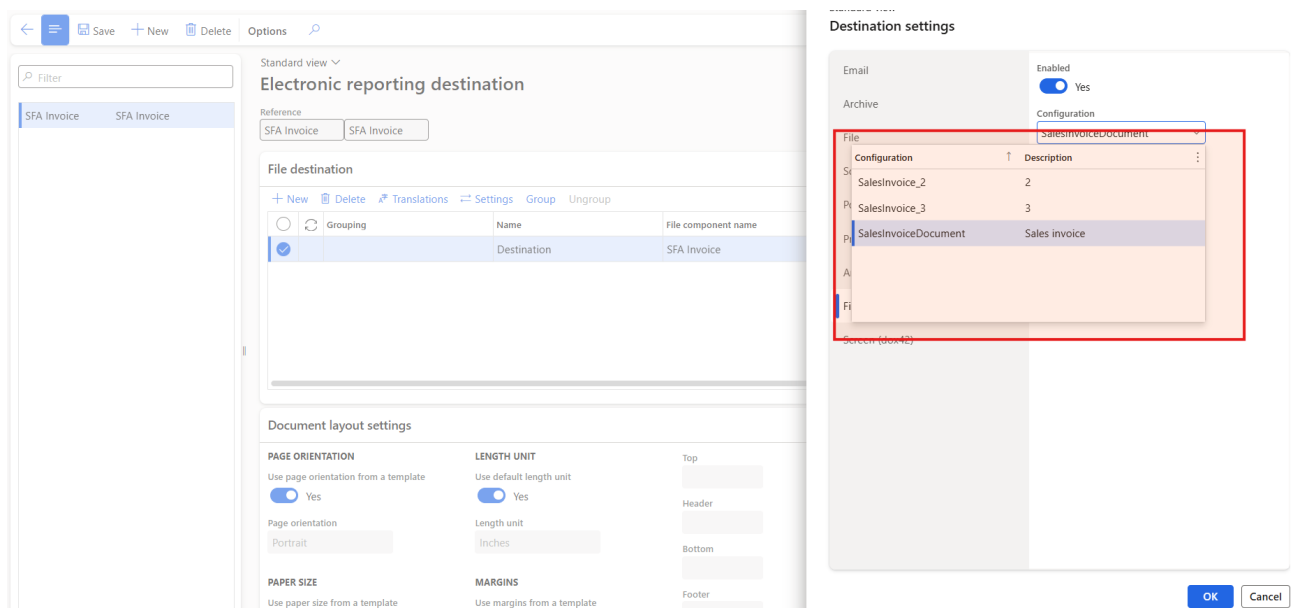
Filter

Configuration	Description	Format	Language preferences
<input type="radio"/> SalesInvoice ESH	invoice	Sales Invoice (Excel) ESH Sales Invoice (Excel) ESH	User preference
SalesInvoiceDocument	Sales invoice	Sales invoice (Excel) Sales invoice (Excel)	

Language to find an appropriate report template later (column "Language preferences") can be based on:

- "User preference " - language of the user who generates the report
- "Company preference" - language of the legal entity where the report is run
- Blank - the language is not setup

If you create several dox42 configurations, all of them will be available for choosing in Electronic Reporting destination settings. For all the print destinations field "Configuration" is mandatory to be filled in:



Electronic reporting destination

Reference: SFA Invoice SFA Invoice

File destination

Grouping	Name	File component name
<input checked="" type="radio"/>	Destination	SFA Invoice

Document layout settings

PAGE ORIENTATION
 Use page orientation from a template: ☒ Yes
 Page orientation: Portrait

LENGTH UNIT
 Use default length unit: ☒ Yes
 Length unit: Inches

PAPER SIZE
 Use paper size from a template: ☒ Yes

MARGINS
 Use margins from a template: ☒ Yes

Destination settings

Email: ☒ Enabled Yes

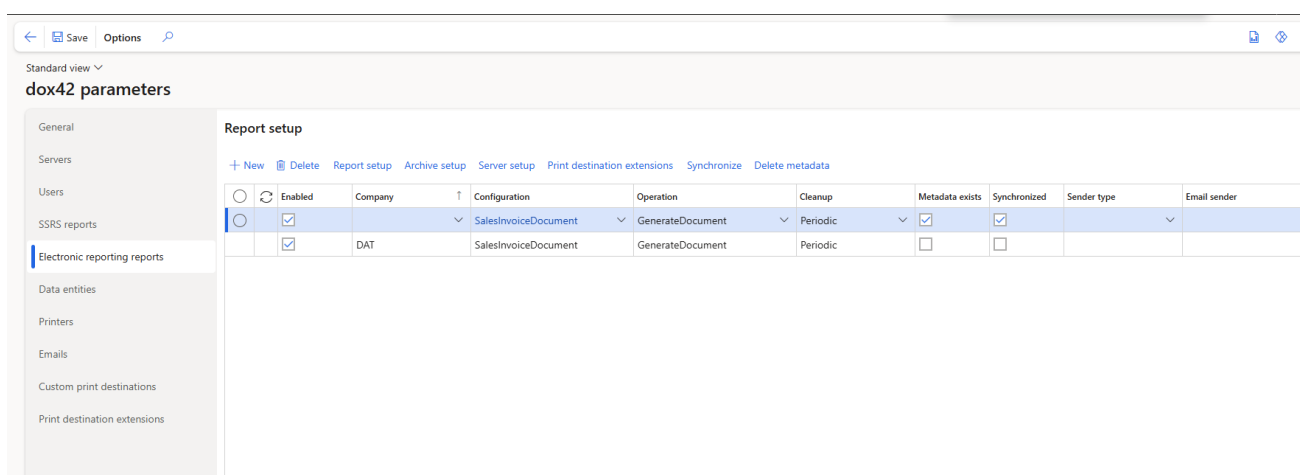
Archive: ☒ Enabled Yes

Configuration: SalesInvoiceDocument

Configuration	Description
SalesInvoice_2	2
SalesInvoice_3	3
SalesInvoiceDocument	Sales invoice

OK Cancel

In the dox42 parameters form you can find a new tab "Electronic reporting reports" where you can setup your configuration (the one created in previous step in "dox42 configurations" form):



dox42 parameters

Report setup

Enabled	Company	Configuration	Operation	Cleanup	Metadata exists	Synchronized	Sender type	Email sender
<input checked="" type="checkbox"/>	DAT	SalesInvoiceDocument	GenerateDocument	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Report setup of Electronic Reporting report looks the same way as for SRSS reports:

Finance and Operations

System administration

>

Setup

>

dox42

>

dox42 parameters

USMF

←

Save

+ New

Delete

SharePoint mapping

Options

🔍

📄

Language specific setup

Standard view ▾

🔍 Filter

○	↺	Company	Language	Title	Operation	Template name	Email operation
○		▾	▾		GenerateDocument ▾	C:\dox42Server\templates\FI\pDevSFP21\SFA Invoice\SFA Invoice.docx	GenerateDocument

In the dox42 audit log you can check the printing of your Electronic reporting report by filtering columns: "Report type"; "Configuration" and "Format":

dox42 audit log

Standard view ▾

Filter Log type Print medium

	Report type	Language	Report	Design	Configuration	Format	Root data entity	Title
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	Electronic reporting	en-us			SalesInvoiceDocument	SFA Invoice SFA Invoice		SFA Invoice
IV	SSRS report	en-us	SalesInvoice	Report				Show invoice
IV	SSRS report	en-us	SalesInvoice	Report				Show invoice
IV	SSRS report	en-us	SalesInvoice	Report				Show invoice
IV	SSRS report	en-us	SalesInvoice	Report				Show invoice
IV	SSRS report	en-us	SalesInvoice	Report				Show invoice

While setting up Electronic reporting through Print Management, you should choose the appropriate report format and do the setup on the "Electronic reporting named destination" form:

Finance and Operations

Accounts receivable
> Setup
> Forms
> Form setup

USMF

Standard view

Print management setup

Module - accounts receivable

Documents

Collection letter note
Customer account statement
Customer invoice
Original <Default>
Free text invoice
Interest note
Payment advice
Sales advance invoice
Sales agreement confirmation
Sales order confirmation
Sales order packing slip
Sales quotation
Sales quotation confirmation

Module - inventory management

Documents

Picking list

ORIGINAL OR COPY IDENTIFICATION

Original / copy

Original

Name

Original

Suspend printing for this document

No

☒
DEFAULT SETTING

Help

If conditional settings are not set up or do not apply, print the document using the following setting.

Destination name

name

Report format

Sales invoice (Excel)

All countries/regions

Report format

Default country/region

Sales invoice (Excel)

Sales Invoice (Excel) ESH

SalesInvoice.Report

Finance and Operations Accounts receivable > Setup > Forms > Form setup USMF

Save + New Delete Copy Copy from default Options

Filter

Sales Invoice document

New Record | Standard view

Electronic reporting named destination

Name
Sales Invoice document

File destination

+ New Delete Translations Settings Group Ungroup

	Grouping	Name	File component name	Settings	Stop processin...	Convert to PDF	Document type
<input type="radio"/>		1	Sales invoice	Screen (dox42)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Any
<input checked="" type="radio"/>		2	Sales invoice	File (dox42)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Any

In the standard form "Electronic Reporting jobs" (Organization administration => Electronic Reporting => Electronic reporting jobs) you will be able to see the history of report's running:

Finance and Operations Organization administration > Electronic reporting > Electronic reporting jobs USMF

Delete Show log Show files Options

Electronic reporting jobs

Standard view

Filter

Task description	Status	Created date and time	Actual start date/time	End date/time	Archived	Created by
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/22/2025 7:19:13 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/22/2025 7:19:52 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/23/2025 9:30:35 AM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/23/2025 4:47:29 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Error	1/23/2025 4:52:21 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Error	1/23/2025 4:53:21 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:29:01 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:30:43 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:31:08 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:31:53 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:32:45 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/24/2025 4:37:27 PM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/27/2025 11:03:38 AM				
Run of Format mapping 'Sales invoice (Excel)', configuration 'Sales invoice (Excel)'	Finished	1/27/2025 11:08:10 AM				

7.12.2 Setup in dox42 template

The same as for SRSS report, before doing setup in dox42 template, you will need to get the metadata for your ER report. For doing this:

- Print the report
- Make sure the checkboxes of the ER report setup are marked like in the picture below, the system will automatically synchronize the report:

Finance and Operations | System administration > Setup > dox42 > dox42 parameters | USMF

Standard view

dox42 parameters

General | Servers | Users | SSRS reports | **Electronic reporting reports** | Data entities | Printers | Emails | Custom print destinations | Print destination extensions

Report setup

+ New | Delete | Report setup | Archive setup | Server setup | Print destination extensions | Synchronize | Delete metadata

	Enabled	Company	Configuration	Operation	Cleanup	Metadata exists	Synchronized	Sender type	Email send
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		SalesInvoiceDocument	GenerateDocument	Periodic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	DAT	SalesInvoiceDocument	GenerateDocument	Periodic	<input type="checkbox"/>	<input type="checkbox"/>		

All the data sources, including Input Parameter, Connection Excel file, Crypto, Entity "Dox42ReportStorageLastRecordsV3_SF" with Last TransactionID are setup the same way as for SRSS report.

1. Electronic Reporting data sources

There are 2 tables available for Electronic Reporting as D365 FSCM Report data source:

- ERReportData
- ERReportStaticParameters

D365 FSCM Report Data Source

Name: ERReportData

D365 FSCM Report | Connection | License

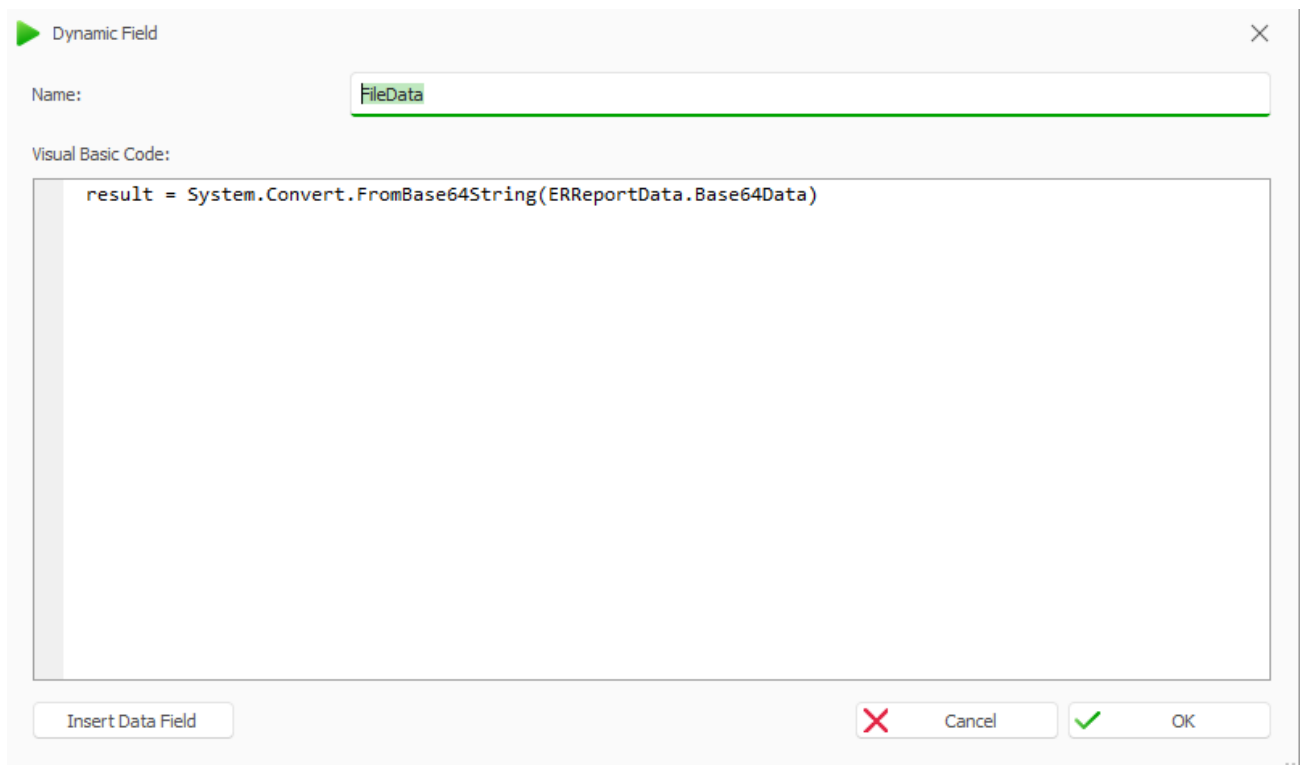
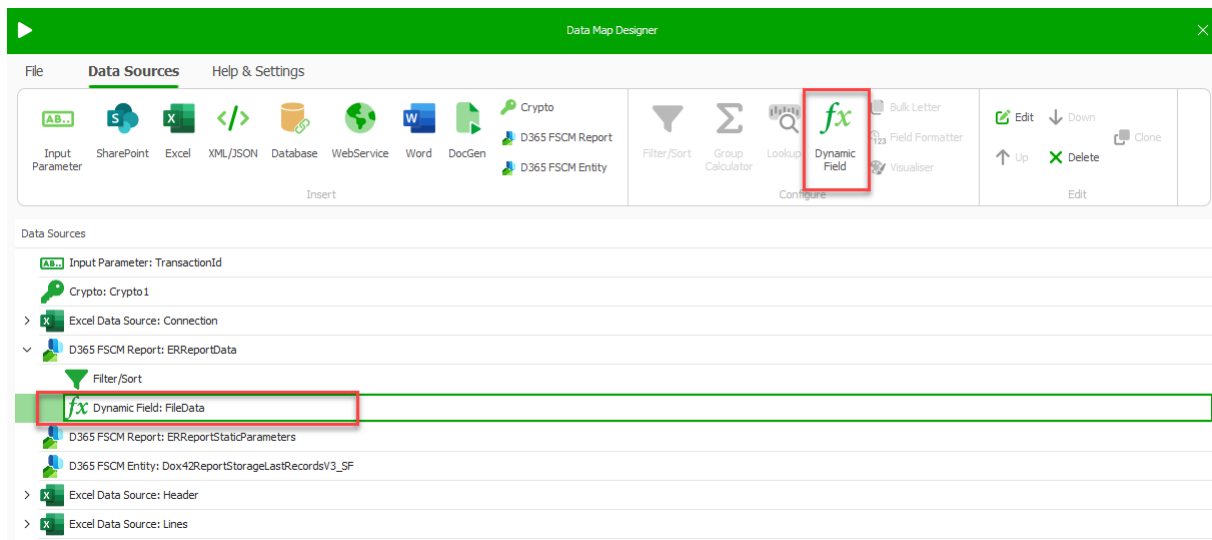
Report: [Electronic_Reporting]:SalesInvoiceDocument Configure

Table: ERReportData [ER: Report data] Preview Data

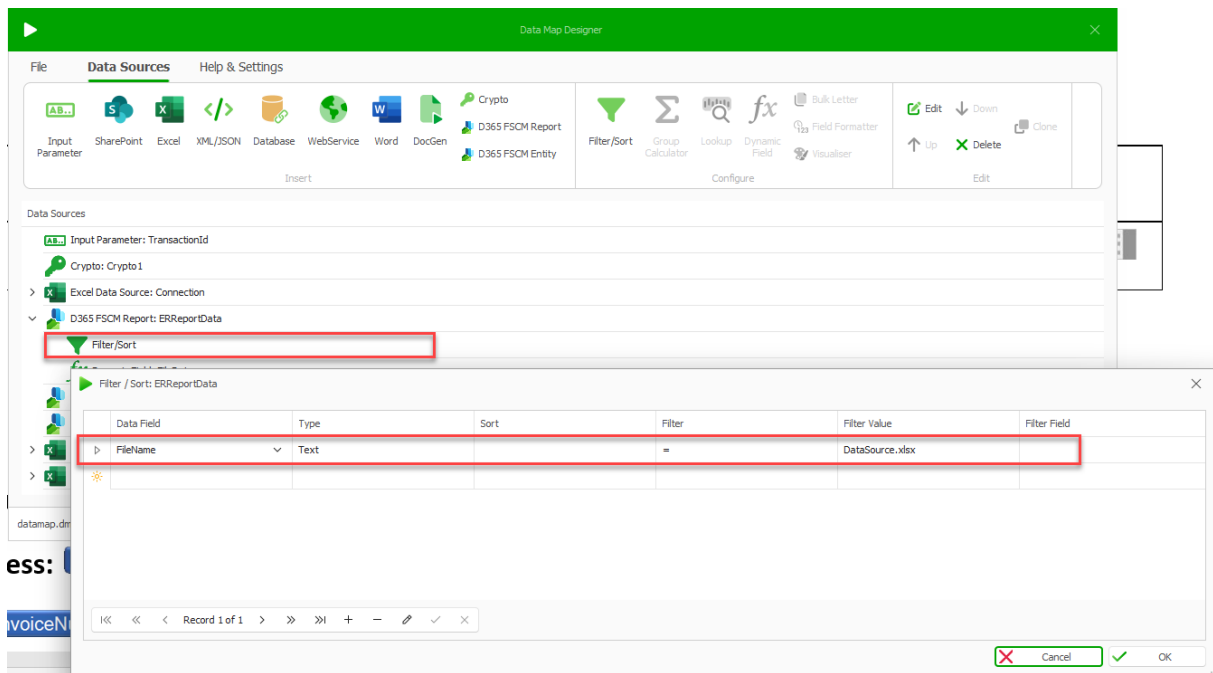
ERReportData [ER: Report data]

ERReportStaticParameters [ER: Report static parameters]

ERReportData table has a "Base64Data" field which contains Electronic reporting data as a Base64 encoded string. To be able to use Electronic Reporting data in the report design, the new dynamic field should be added to the data source as following (this dynamic field is optional and not necessarily required for new dox42 versions):

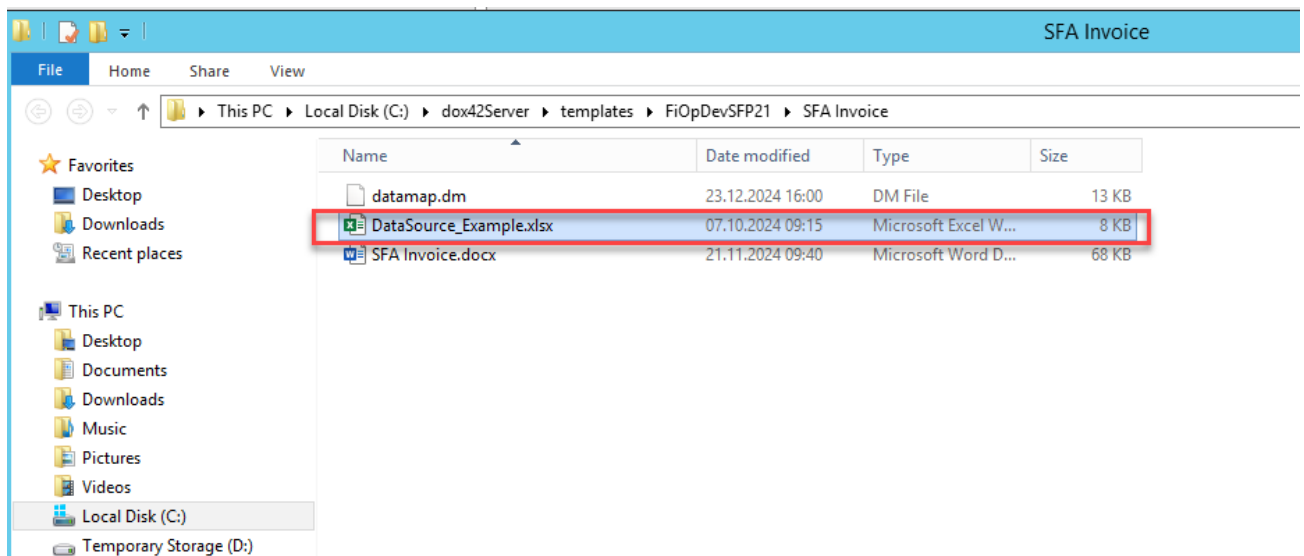


You can setup the filter/sort for ERReportData table that picks up the file name of the template you need:

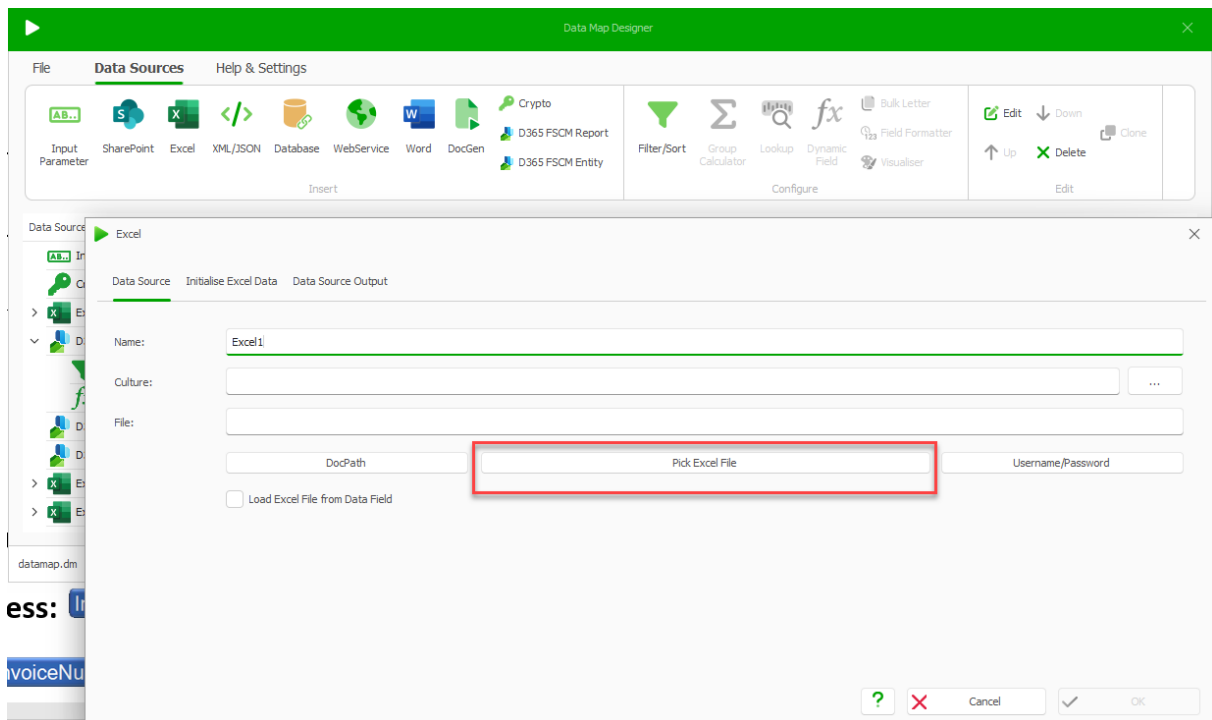


2. Parsing report data

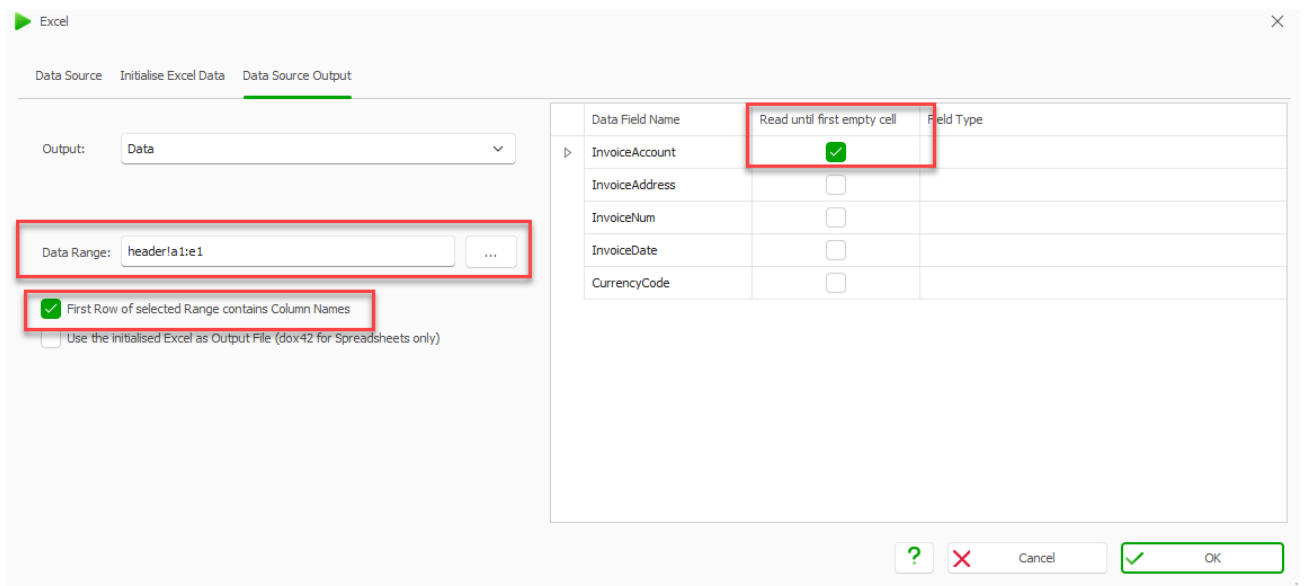
- a) As soon as we decided to use Excel as a report output in the ER configuration format, we can now copy this template file from D365 to the folder on dox42 server for the next data source configuration purposes:



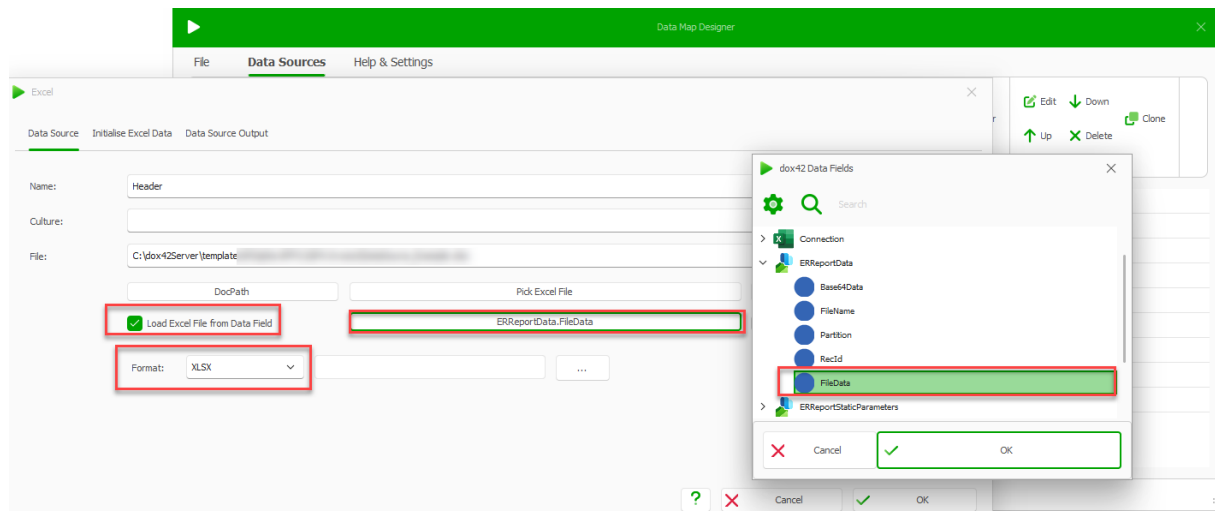
- b) We further use the dox42 Excel data source to read this file:



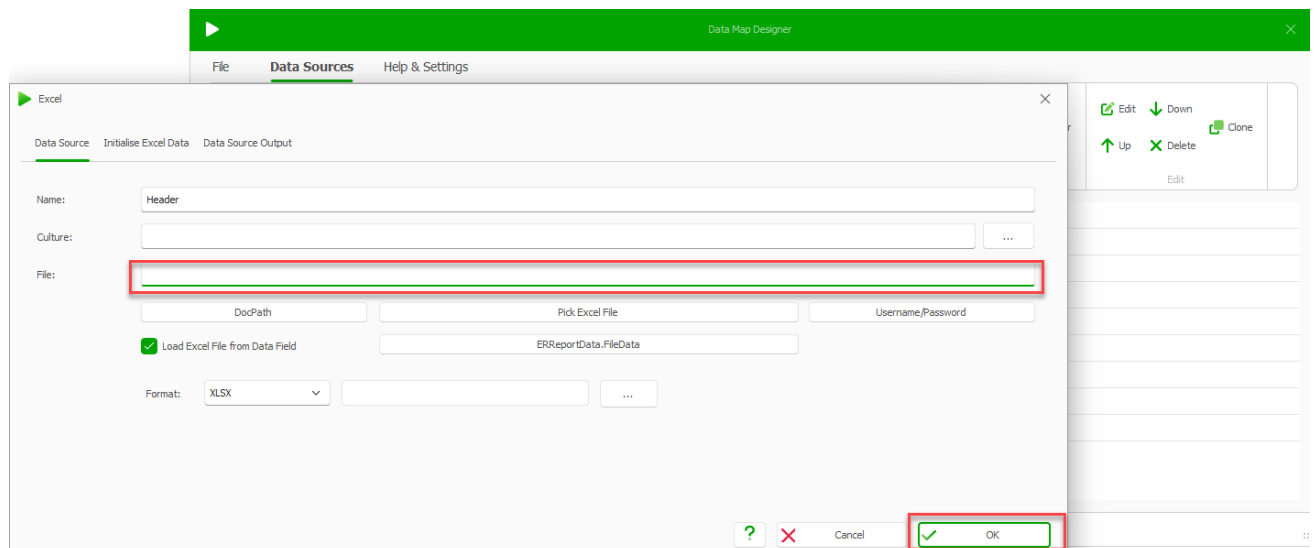
- c) Put a data range of the fields that you are going to use in a template and activate these 2 checkboxes from a screenshot:



- d) Move back to "Data source" tab - activate checkbox the "Load Excel from Data field"; choose the dynamic data field "FileData" from ERReportData table (for new dox42 versions you can directly choose the original field "Base64Data", the dynamic field is not necessarily required, the conversion will be done automatically); setup the format "XLSX" for the file:



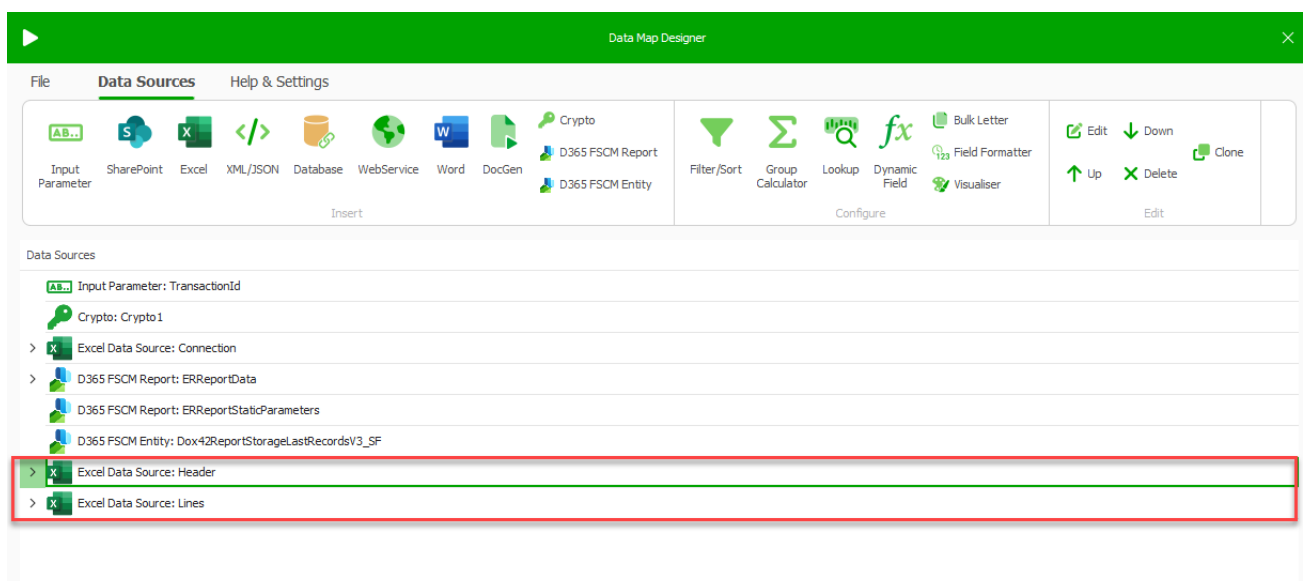
e) Delete the File name from the line and click "OK":



In our example ER configuration has 2 tables with Header and Lines and our Excel template file contains data on 2 separate Excel sheets:

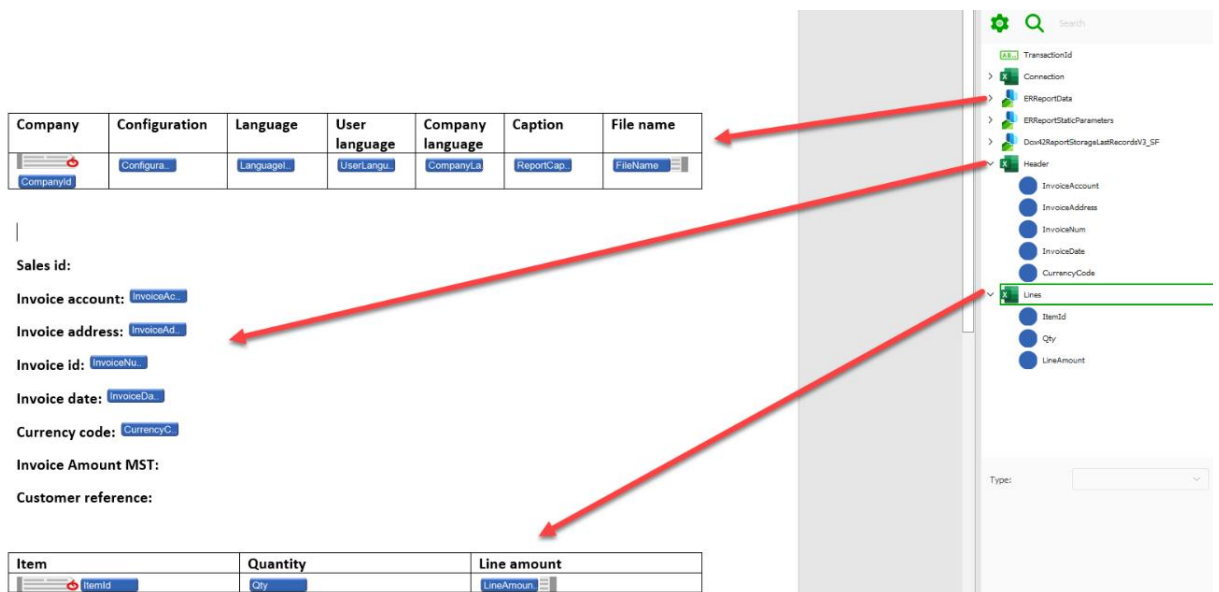
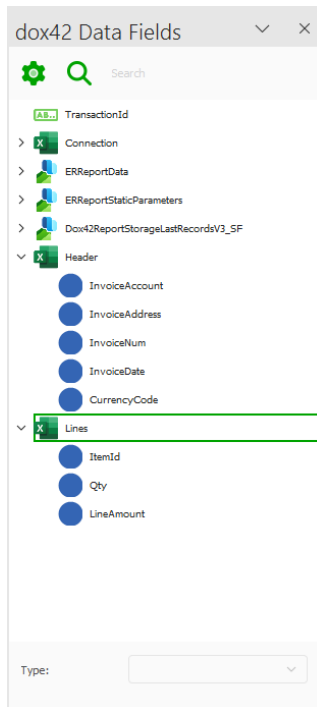
	A	B	C	D	E	F
1	InvoiceAccount	InvoiceAddress	InvoiceNum	InvoiceDate	CurrencyCode	
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						

Therefore, for more convenience separate Excel data sources can be created in the DataMap for Header and Lines data:

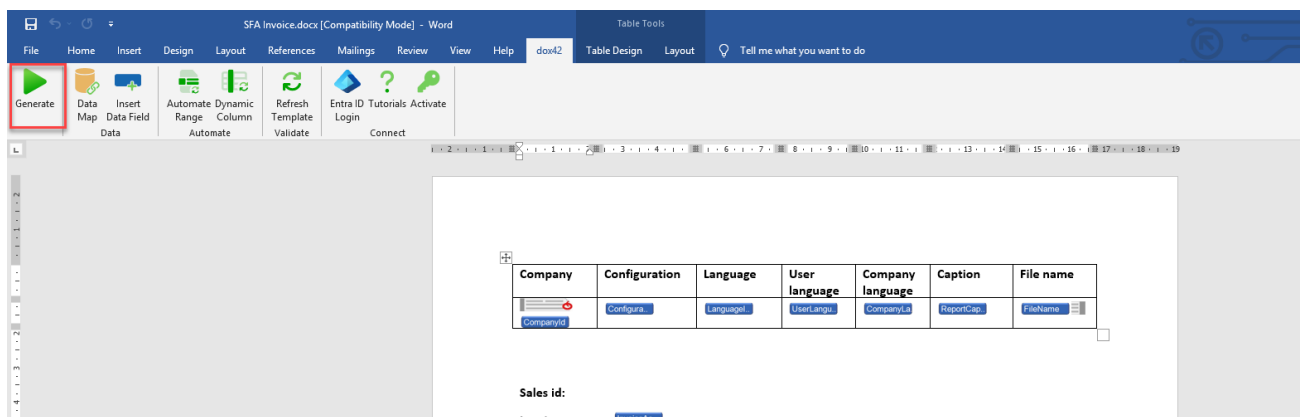


3. Generating template

Now all the fields are visible in the list of dox42 data fields and can be added to the design of the template the same way as it is done for SRSS report:



After finishing the design, we print the template in Word:



Afterwards, check the printing in D365. The report is successfully printed:

1 / 1 100% [Icons]						
Company	Configuration	Language	User language	Company language	Caption	File name
USMF	SalesInvoiceDocument	en-us	en-us	en-us	SFA Invoice	DataSource.xlsx
Sales id:						
Invoice account: DE-001						
Invoice address: Bahnhofstrasse 5						
10115 Berlin						
deu						
Invoice id: [Redacted]						
Invoice date: 3/29/2021						
Currency code: EUR						
Invoice Amount MST:						
Customer reference:						
Item	Quantity		Line amount			
D0001	1		190.03			

8 Integration with external apps

8.1 What is dox42 integration framework in D365 FSCM?

This integration framework is intended to make it easier for architects and developers implementing integration scenarios, namely, getting access to D365 FSCM reports from external systems as well as generating D365 FSCM reports on fly from external systems. It contains a set of options and features for implementing recommended integration patterns and scenarios allowing you to reduce implementation costs considering integration best practices.

The following table lists the integration patterns that are available.

Pattern	Description	Documentation (links)
OData	Getting access to reports via OData entity actions (for example, accessing/generating reports from Microsoft Power Automate)	Open Data Protocol (OData)
Custom service	Getting access to reports via custom service methods (any third-party app can call web-services)	Custom service development

The framework configuration process is independent on the integration pattern used. Once your framework configuration is done, you can use all integration patterns simultaneously and independently on each other or just some of them you need.

All patterns support synchronous and asynchronous integration scenarios. A synchronous pattern blocks the caller until the callee has finished running and gives a response (report). An asynchronous pattern is intended just to trigger processing (report) and resume the caller not waiting for the callee process finishing even if the API itself can be synchronous at its core.

There are also built-in request tracing and error handling capabilities in the framework. When you use a synchronous pattern, success or failure responses are returned to the caller. By using an asynchronous pattern, the caller receives an immediate response that indicates whether the process triggering call was successful (the status/result of the processing is not pushed to the caller; polling for the result of the corresponding process by the caller is also not supported – you cannot get the result in the asynchronous scenario so far in the current framework version).

8.2 Configuring dox42 integration framework settings

8.2.1 Integration profiles

An integration profile is used as an identifier of the external system where the request is sent from (System administration => Setup => dox42 integration framework => dox42 integration profiles).

Finance and Operations

System administration > Setup > dox42 integration framework > dox42 integration profiles

Save

New

Delete

dox42 integration audit log

Options

dox42 integration profiles

Standard view

Filter

	Profile	Description	Profile group	Contract format	Integration request id	Default configuration
	WH_Vienna1	Warehouse "Vienna 1"	WMS	JSON	Automatic	SalesInv
	WH_Vienna2	Warehouse "Vienna 2"	WMS	JSON	Automatic	

- "Profile" – integration profile identifier.
- "Description" – description of the integration profile.
- "Profile group" – a group of the profiles can be managed together (System administration => Setup => dox42 integration framework => dox42 integration profile groups).

For example, different, warehouses can be combined into one profile group called "WMS", etc.

Finance and Operations		
System administration > Setup > dox42 integration framework > dox42 integration profile groups		
Edit	New	Delete
Options		
dox42 integration profile groups		
Standard view		
Filter		
	Profile gro...	Description
<input type="checkbox"/>	WMS	Warehouse management

- Profile group – integration profile group identifier.
 - Description – description of the integration profile group.
- "Contract format" – integration request/response data format (by default is "JSON", it can be extended with custom formats).
- "Integration request id" – request identifier for tracing purposes (GUID):
 - "Manual" – meaning that the request id must be always provided in the request by external systems, otherwise the system stops processing and causes an error message.
 - "Automatic" – if the request id is not provided in the request by external systems, it is initialized with a random value and processing continues.

- “Default configuration” – default value of the configuration used when the configuration is not specified explicitly in the request. If the field is empty, then the system will stop processing and cause an error message if no configuration is specified in the request for some reason.

It is recommended to specify the integration profile in the request. But, if you do not want to send the integration profile in the request (for example, you have only one external system), then you can set a default value for the integration profile in the parameters (System administration => Setup => dox42 integration framework => dox42 integration parameters), this value will be used if no profile is specified in the request. If no default value is specified and no profile is specified in the request, then the system will stop processing cause an error message.

Finance and Operations > System administration > Setup > dox42 integration framework > dox42 integration parameters

Save Options

Standard view ▾

dox42 integration parameters

General

Set up parameters for the dox42 integration

DEFAULTS

Profile

WH_Vienna1 ▾

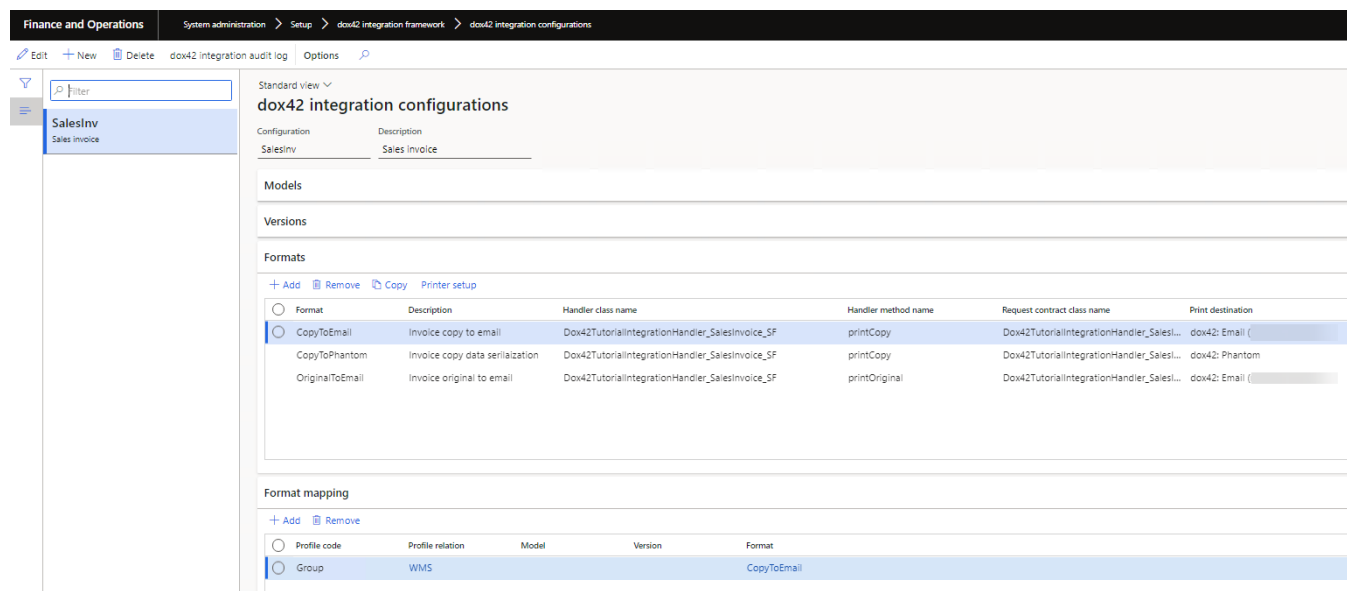
8.2.2 Integration configurations

An integration configuration is intended to be a representation of the report for the external systems (System administration => Setup => dox42 integration framework => dox42 integration configurations). The configuration contains models, versions, and formats. As well as format mapping, which determines which format will be used in each specific case (depending on the

requested model and version of the configuration). External systems do not request formats directly, they request a combination of:

- Configuration
- Model
- Version

, subsequently the appropriate format is found and called then based on the format mapping.



The screenshot displays the 'dox42 integration configurations' interface. The top navigation bar includes 'Finance and Operations', 'System administration', 'Setup', 'dox42 integration framework', and 'dox42 integration configurations'. The main area is titled 'dox42 integration configurations' and shows a table of formats. The table has columns: Format, Description, Handler class name, Handler method name, Request contract class name, and Print destination. The table lists three formats: 'CopyToEmail', 'CopyToPhantom', and 'OriginalToEmail'. Below the table is a 'Format mapping' section with a table that maps a 'Group' to a 'WMS' profile relation and a 'CopyToEmail' format.

Format	Description	Handler class name	Handler method name	Request contract class name	Print destination
CopyToEmail	Invoice copy to email	Dox42TutorialIntegrationHandler_SalesInvoice_SF	printCopy	Dox42TutorialIntegrationHandler_Sales...	dox42: Email (
CopyToPhantom	Invoice copy data serialization	Dox42TutorialIntegrationHandler_SalesInvoice_SF	printCopy	Dox42TutorialIntegrationHandler_Sales...	dox42: Phantom
OriginalToEmail	Invoice original to email	Dox42TutorialIntegrationHandler_SalesInvoice_SF	printOriginal	Dox42TutorialIntegrationHandler_Sales...	dox42: Email (

Profile code	Profile relation	Model	Version	Format
Group	WMS			CopyToEmail

- “Configuration” – integration configuration identifier.
- “Description” – description of the integration configuration.
- “Models” - models (optional) can be used to differentiate the integration configuration according to a certain attribute, depending on your needs. For example, you can differentiate the integration configuration by country if the processing logic depends on it (AT, BE, DE, FR, NL, etc.). External systems will be able to request a specific configuration model in this scenario.
 - “Model” – integration configuration model identifier.
 - “Description” – description of the integration configuration model.
- “Versions” – versions (optional) can be used to register different versions of the configuration can obtain simultaneously (for example, v1.0, v1.1, v1.2, v2.0, etc.). It can be a powerful feature to synchronize configuration updates in D365 FSCM with the external systems. External systems will be able to request a specific configuration version in this scenario.
 - “Version” – integration configuration version identifier.
 - “Description” – description of the integration configuration version.
- “Formats” – formats are used to define the processing logic of the configuration.
 - “Format” – integration configuration format identifier.
 - “Description” – description of the integration configuration format.
 - “Handler class name” – a handler class implementing the processing logic (see the “Dox42TutorialIntegrationHandler_SalesInvoice_SF” tutorial class implementing an

example of the processing logic for sales invoices to understand the development concept.

- “Handler method name” – a handler class method which will be called to process this format.
- “Request contract class name” – a contract class defining request parameters for this format (pulled up automatically based on the handler selection).
- Button “Copy” – allows to create a new format by copying an existing one.
- Button “Printer setup” – allows to set up a print destination for the format where the report should be printed to. Here it is also possible to choose the “Phantom” destination meaning that the report will not be really printed and the dox42 server will not be even requested for printing, only the data serialization for the report will be performed in this scenario.
- “Format mapping” – determines possible scenarios and formats used.
 - “Profile code”:
 - “Table” – this mapping line is valid only for the profile selected.
 - “Group” – this mapping line is valid only for the profile group selected.
 - “All” – this mapping line is valid for all profiles.
 - “Profile relation” – choose the profile or the profile group depends on the profile code selected.
 - “Model” – the configuration model this mapping line is valid for (optional).
 - “Version” – the configuration version this mapping line is valid for (optional).
 - “Format” – the format is used to process configuration.

8.2.3 Integration settings overview

An overview form is available to see all configured integration scenarios in one place (System administration => Inquiries => dox42 integration framework => dox42 integration overview).

Finance and Operations									
System administration > Inquiries > dox42 integration framework > dox42 integration overview									
Options									
dox42 integration overview									
Standard view									
Filter									
Configuration	Profile code	Profile relation	Model	Version	Format	Handler class name	Handler method name	Request contract class name	Print destination
SalesInv	Group	WMS			CopyToEmail	Dox42TutorialIntegrationHandle...	printCopy	Dox42TutorialIntegrationHandle...	dox42: Email (

8.3 Performing tests of integration

It is possible to test integration requests before a real connection with external system is established (System administration => Periodic tasks => dox42 integration framework => dox42 integration request processing). Enter requests parameters and click "OK" to process the integration request (it will be run in context of the current D365 FSCM company).

dox42 integration request processing

Parameters

Profile
WH_Vienna1

Configuration
SalesInv

Model

Version

Integration request id

Request contract format
Auto

Request parameters (string)
{
 "InvoiceId":"CIV-00000741",
 "InvoiceDate":"\Date(1616976000000)\",
 "InvoiceAccount":"DE-001",
}

Run handler async
☒ No

Run in the background

Recurrence Alerts

Batch processing
☒ No

Task description
dox42 integration request proc...

Batch group

Private
☒ No

Critical Job
☒ No

Monitoring category
Undefined

Start date: 1/3/2023 (10:25:41 am) (GMT) Coordinated Universal Time

OK Cancel

- "Profile" – integration profile.
- "Configuration" – integration configuration.
- "Model" – integration configuration model.
- "Version" – integration configuration version.
- "Integration request id" – integration request identifier.
- "Request contract format" – the format used to pass request parameters.
- "Request parameters (string)" – string containing request parameters in the selected format. Set of available parameters is specified in the contract class you can see in the field "Request contract class name" of the configuration format. For example, it can be a JSON string:

```
{
  "InvoiceId":"CIV-00000741",
  "InvoiceDate":"\Date(1616976000000)\",
  "InvoiceAccount":"DE-001",
}
```

- "Run handler async" – specifies whether processing should be asynchronous or synchronous.

8.4 Tracing requests and error handling

It is possible to monitor request statuses, error messages, processing duration and other request processing details in the integration audit log form per D365 FSCM company (System administration => Periodic tasks => dox42 integration framework => dox42 integration audit log).

Trace ID	Log type	Start date/time	End date/time	Created by	Profile	Configuration	Model	Version	Integration request id
✓ (A1E5FA3-086A-4539-9859-46...	Custom service request			Admin					
✓ (9CAB7AE2-DDF5-4DCF-8C29-8...	Execute handler			Admin	WH_Vienna1	SalesInv			(BAA1C3A2-440B-44FC-8C3C-E

- “Trace ID” – unify records belonging to one integration request.
- “Log type”:
 - “Execute handler” – handler execution log (request processing logic).
 - “Request processing” – request processing triggered.
 - “OData action request” – OData action request received.
 - “Custom service request” – custom service request received.
- Button “Retry request” – allows to rerun request processing.
- Button “dox42 audit log” – shows related entries in the dox42 audit log.

You can configure the error logging tolerance per log type and D365 FSCM company (System administration => Setup => dox42 => dox42 company parameters).

ODATA ACTION REQUEST	CUSTOM SERVICE REQUEST	REQUEST PROCESSING	EXECUTE HANDLER
Log level	Log level	Log level	Log level
Always	Always	Always	Always
Errors only			
Never			

Old log entries may be automatically cleaned up on a periodical basis (System administration => Periodic tasks => dox42 integration framework => Cleanup dox42 integration audit log). This function runs in context of the current D365 FSCM company.

Cleanup dox42 integration audit log

Parameters

PERIOD

Days of limitation period

Run in the background

[Recurrence](#) [Alerts](#)

Batch processing

☒ No

Task description

Cleanup dox42 integration audi...

Batch group

Private

☒ No

Critical Job

☒ No

Monitoring category

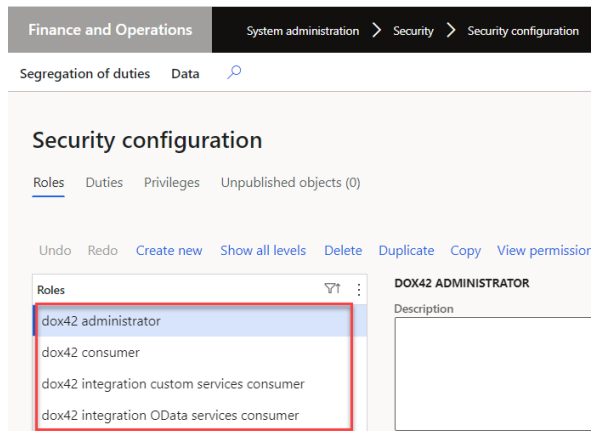
Undefined

Start date: 1/3/2023 (12:06:19 pm) (GMT) Coordinated Universal Time

- “Days of limitation period” – entries older than this number of days are removed.

8.5D365 F & SCM Security Configuration

There are 4 standard dox42 security roles in D365:



To be able to maintain configuration, dox42 parameters and settings, the security role “dox42 administrator” should be applied.

To be able to call Reports and Entities, the security role “dox42 consumer” should be applied.

To be able to call the entity actions, the security role “dox42 integration OData services consumer” (Dox42IntegrationODataServiceConsumer_SF) should be applied.

To be able to call the custom service methods, the security role “dox42 integration custom services consumer” (Dox42IntegrationCustomServiceConsumer_SF) should be applied.

8.6 Integration patterns

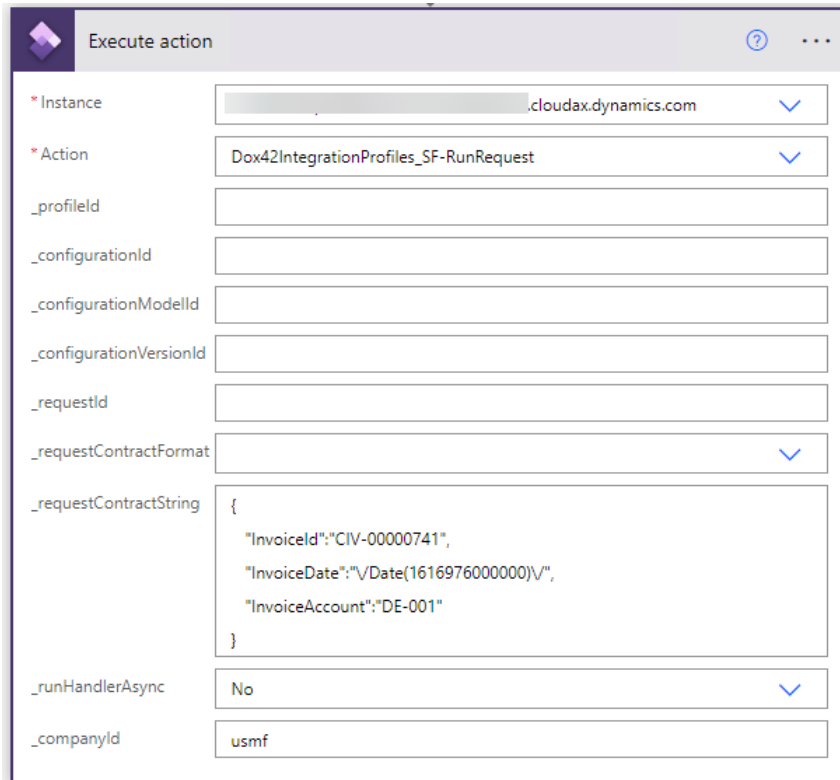
8.6.1 Integration based on OData

OData entity actions can be used to integrate with external apps. There are following OData entity actions available:

- “Dox42IntegrationProfileEntity_SF” data entity (public name Dox42IntegrationProfiles_SF):
 - “runRequest” – runs request with no result returned (allows to run request synchronously and asynchronously).
 - “runRequestAndGetReportFileUrl” – runs request synchronously and returns the report file URL.
 - “runRequestAndGetReportFileUrlList” – runs request synchronously and returns the report files as a list of URLs (allows to return more than one file if needed).
 - “runRequestAndGetReportFileBase64” – runs request synchronously and returns the report file as Base64 encoded string.
 - “runRequestAndGetReportFileBase64List” – runs request synchronously and returns the report files as a list of Base64 encoded strings (allows to return more than one file if needed).
 - “runRequestAndGetReportTransaction” – runs request synchronously and returns the report transaction id used as an input parameter in the dox42 template.
 - “runRequestAndGetReportTransactionList” – runs request synchronously and returns a list of the report transaction ids (allows to return more than one report transaction id if needed).

To be able to call the entity actions, the security role “dox42 integration OData services consumer” (Dox42IntegrationODataServiceConsumer_SF) should be applied.

For example, this approach can be used to integrate with Microsoft Power Automate:



Execute action

* Instance: cloudax.dynamics.com

* Action: Dox42IntegrationProfiles_SF-RunRequest

_profileId:

_configurationId:

_configurationModelId:

_configurationVersionId:

_requestId:

_requestContractFormat:

_requestContractString: {
 "InvoiceId": "CIV-00000741",
 "InvoiceDate": "\Date(1616976000000)\V",
 "InvoiceAccount": "DE-001"
}

_runHandlerAsync: No

_companyId: usmf

8.6.2 Integration based on custom services

Custom service methods can be used to integrate with external apps. There are following custom service methods available:

- “Dox42IntegrationServices_SF” service group, “Dox42IntegrationService_SF” service name, operations:
 - “runRequest” – runs request with no result returned (allows to run request synchronously and asynchronously).
 - “runRequestAndGetReportFileUrl” – runs request synchronously and returns the report file URL.
 - “runRequestAndGetReportFileUrlList” – runs request synchronously and returns the report files as a list of URLs (allows to return more than one file if needed).
 - “runRequestAndGetReportFileBase64” – runs request synchronously and returns the report file as Base64 encoded string.
 - “runRequestAndGetReportFileBase64List” – runs request synchronously and returns the report files as a list of Base64 encoded strings (allows to return more than one file if needed).
 - “runRequestAndGetReportTransaction” – runs request synchronously and returns the report transaction id used as an input parameter in the dox42 template.
 - “runRequestAndGetReportTransactionList” – runs request synchronously and returns a list of the report transaction ids (allows to return more than one report transaction id if needed).

To be able to call the custom service methods, the security role “dox42 integration custom services consumer” (Dox42IntegrationCustomServiceConsumer_SF) should be applied.

For example, calling JSON-based custom service:



8.7 Developing integration handlers

To create a new integration handler, there should be a few classes developed:

- Integration handler contract class – determines parameters, which should be passed in the integration request. It should be a classic contract class. As an example, see the class “Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF”, developed for the sales invoice request.

```

1  [DataContractAttribute]
2  internal final class Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF
3  {
4      CustInvoiceId invoiceId;
5      TransDate invoiceDate;
6      CustInvoiceAccount invoiceAccount;
7
8      [DataMemberAttribute('InvoiceId')]
9      public CustInvoiceId parmInvoiceId(CustInvoiceId _invoiceId = invoiceId)
10     {
11         invoiceId = _invoiceId;
12         return invoiceId;
13     }
14
15     [DataMemberAttribute('InvoiceDate')]
16     public TransDate parmInvoiceDate(TransDate _invoiceDate = invoiceDate)
17     {
18         invoiceDate = _invoiceDate;
19         return invoiceDate;
20     }
21
22     [DataMemberAttribute('InvoiceAccount')]
23     public CustInvoiceAccount parmInvoiceAccount(CustInvoiceAccount _invoiceAccount = invoiceAccount)
24     {
25         invoiceAccount = _invoiceAccount;
26         return invoiceAccount;
27     }
28
29 }

```

- Integration handler class – contains the processing logic. It should implement the logic to run a report as well as any other processing logic needed. As an example, see the class “Dox42TutorialIntegrationHandler_SalesInvoice_SF”, developed for the sales invoice request.
 - Handler class should have “Dox42IntegrationHandlerAttribute_SF” attribute.

```

[Dox42IntegrationHandlerAttribute_SF("@SYS191694")]
internal final class Dox42TutorialIntegrationHandler_SalesInvoice_SF
{

```

- There should be a static handler method added which having “Dox42IntegrationHandlerMethodAttribute_SF” attribute with the integration handler contract class specified. This handler method must have a parameter of the class

“Dox42IntegrationHandlerDataContract_SF” and return an object of the class
“Dox42IntegrationHandlerExecutionResult_SF”.

```
[Dox42IntegrationHandlerMethodAttribute_SF(classStr(Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF), "@SYS105081")]
public static Dox42IntegrationHandlerExecutionResult_SF printOriginal(Dox42IntegrationHandlerDataContract_SF _dataContract)
{
    Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF requestSalesInvoiceContract =
        _dataContract.parmRequestContract() as Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF;
    Dox42IntegrationHandlerExecutionResult_SF handlerExecutionResult;
    CustInvoiceJour custInvoiceJour;

    if (!requestSalesInvoiceContract)
    {
        throw error(Error::wrongUseOfFunction(funcName()));
    }

    custInvoiceJour = CustInvoiceJour::findFromCustTrans(
        requestSalesInvoiceContract.parmInvoiceId(),
        requestSalesInvoiceContract.parmInvoiceDate(),
        requestSalesInvoiceContract.parmInvoiceAccount());

    if (!custInvoiceJour.RecId)
    {
        throw error("@SYP4860680");
    }

    SrsReportDataContract reportDataContract = Dox42TutorialIntegrationHandler_SalesInvoice_SF::printInvoice(
        custInvoiceJour.RecId,
        _dataContract.parmPrintSettings());

    handlerExecutionResult = Dox42IntegrationHandlerExecutionResult_SF::newHandlerExecutionResult(
        con2List(reportDataContract.dox42ReportTransaction),
        con2List(reportDataContract.dox42DocuRef),
        strFmt("@SYS26868", custInvoiceJour.InvoiceId, custInvoiceJour.InvoiceDate));

    return handlerExecutionResult;
}
```

```
[Dox42IntegrationHandlerMethodAttribute_SF(classStr(Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF), "@SYS105080")]
public static Dox42IntegrationHandlerExecutionResult_SF printCopy(Dox42IntegrationHandlerDataContract_SF _dataContract)
{
    Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF requestSalesInvoiceContract =
        _dataContract.parmRequestContract() as Dox42TutorialIntegrationHandler_SalesInvoiceContract_SF;
    Dox42IntegrationHandlerExecutionResult_SF handlerExecutionResult;
    CustInvoiceJour custInvoiceJour;

    if (!requestSalesInvoiceContract)
    {
        throw error(Error::wrongUseOfFunction(funcName()));
    }

    custInvoiceJour = CustInvoiceJour::findFromCustTrans(
        requestSalesInvoiceContract.parmInvoiceId(),
        requestSalesInvoiceContract.parmInvoiceDate(),
        requestSalesInvoiceContract.parmInvoiceAccount());

    if (!custInvoiceJour.RecId)
    {
        throw error("@SYP4860680");
    }

    SrsReportDataContract reportDataContract = Dox42TutorialIntegrationHandler_SalesInvoice_SF::printInvoice(
        custInvoiceJour.RecId,
        _dataContract.parmPrintSettings(),
        PrintCopyOriginal::Copy);

    handlerExecutionResult = Dox42IntegrationHandlerExecutionResult_SF::newHandlerExecutionResult(
        con2List(reportDataContract.dox42ReportTransaction),
        con2List(reportDataContract.dox42DocuRef),
        strFmt("@SYS26868", custInvoiceJour.InvoiceId, custInvoiceJour.InvoiceDate));

    return handlerExecutionResult;
}
```

```

public static SrsReportDataContract printInvoice(
    RecId _invoiceRecId,
    SRSPrintDestinationSettings _printDestinationSettings,
    PrintCopyOriginal _printCopyOriginal = PrintCopyOriginal::Original)
{
    PrintMgmtReportFormatName printMgmtReportFormatName = PrintMgmtDocType::construct(PrintMgmtDocumentType::SalesOrderInvoice).getDefaultReportFormat();
    SalesInvoiceContract salesInvoiceContract = new SalesInvoiceContract();

    salesInvoiceContract.parmRecordId(_invoiceRecId);
    salesInvoiceContract.parmPrintCopyOriginal(_printCopyOriginal);

    SrsReportRunController srsReportRunController = new SrsReportRunController();
    srsReportRunController.parmReportName(printMgmtReportFormatName);
    srsReportRunController.parmExecutionMode(SysOperationExecutionMode::Synchronous);
    srsReportRunController.parmShowDialog(false);
    srsReportRunController.parmReportContract().parmRdpContract(salesInvoiceContract);
    srsReportRunController.parmReportContract().parmPrintSettings(_printDestinationSettings);

    srsReportRunController.startOperation();

    if (!srsReportRunController.parmReportContract().parmReportExecutionInfo().parmIsSuccessful())
    {
        throw error("@DOX54");
    }

    return srsReportRunController.parmReportContract();
}

```

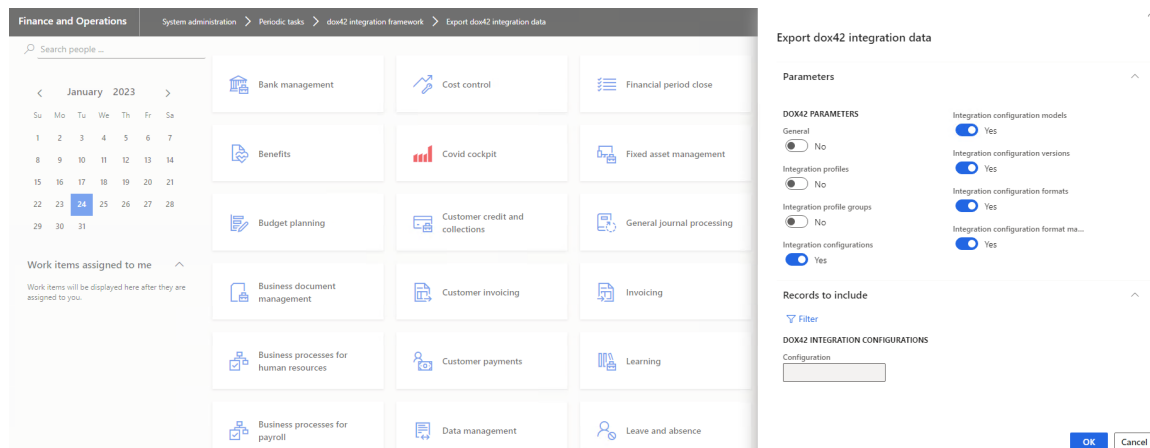
8.8 Transfer settings to productive D365 FSCM environment

It is recommended to make/change settings and test integration scenarios in the test D365 FSCM environment before running the integration in the productive D365 FSCM environment.

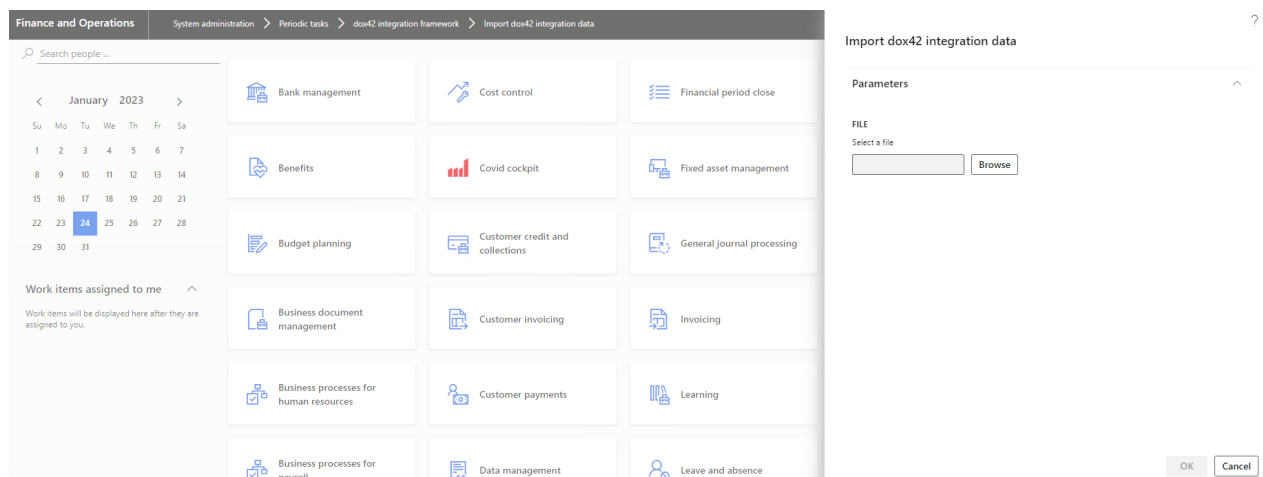
To transfer settings from the test environment to the productive environment, there is a special functionality available:

1. Export settings from the test environment (System administration => Periodic tasks => dox42 integration framework => Export dox42 integration data). In the dialog you can choose what

kind of settings you would like to export. You can also set up a filter for the configurations to be exported. As a result, a file with the settings will be created.



2. Import settings from the file to the prod environment (System administration => Periodic tasks => dox42 integration framework => Import dox42 integration data).



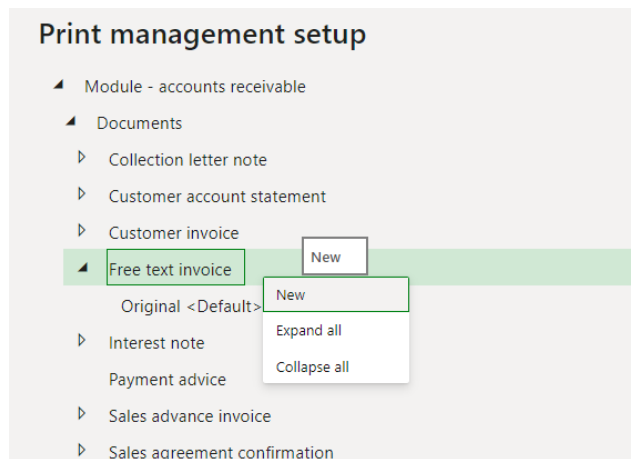
9 FAQ

9.1 Using different print mediums with a single call

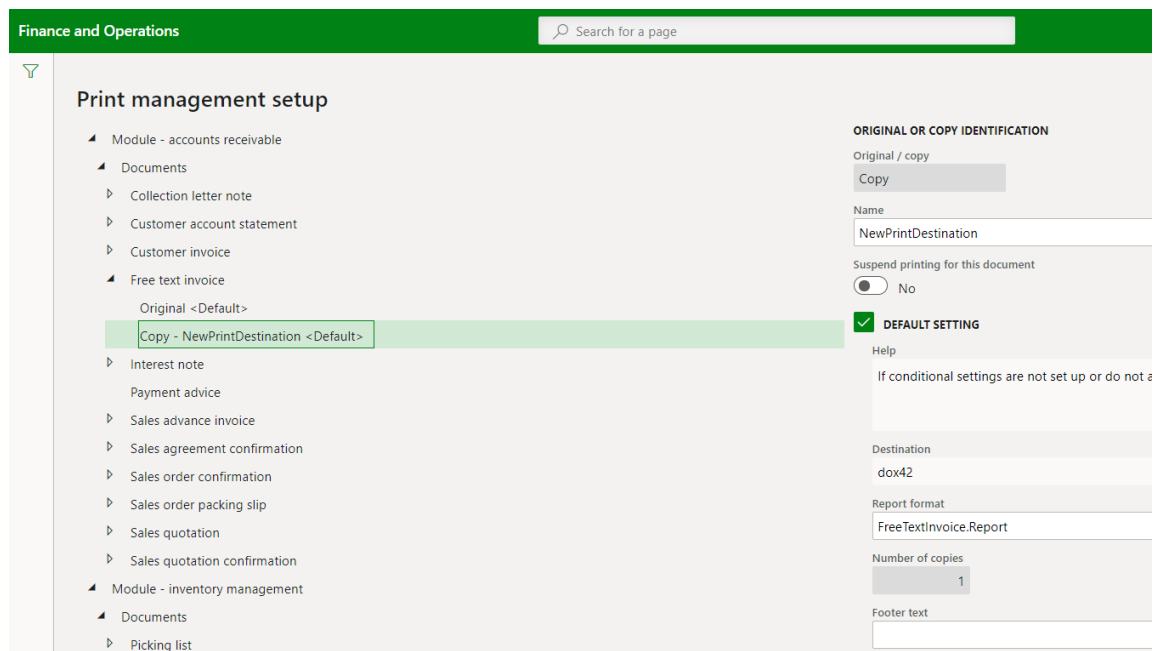
Scenario: The report should be sent as email, printed and displayed on the screen.

The print management provides the possibility to register not only one but as many print destinations as desired.

Right click on the report name will display a menu which provides the button “new”, this button creates a new print destination setup.



The D365 FSCM will sequentially process all the lines (print destinations) which are registered.



9.2 Performance

Scenario: Generating a report takes a long time.

In this scenario the first step would be to check the request duration time in the “dox42 Audit log”, to know the printing time of each print medium and which report has a bad performance.

dox42 Audit log

Filter

dox42 type

Common

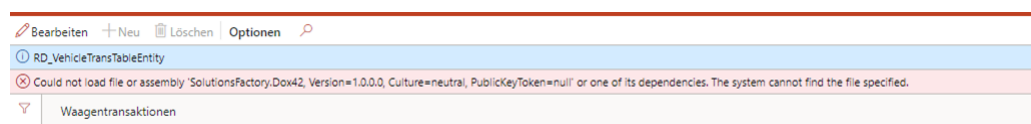
✓	Company	Language	Report	Design	Title	Server request status	Request duration (s)	Print medium	Template name
	usmf	en-us	SalesInvoice		Show invoice	Error	2,05	SharePoint	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	1,51	File server	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	2,54	File server	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	49,05	Email	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	1,38	File	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	1,63	File server	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	2,64	File server	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	2,69	Screen	C:\dox42Server\templates\
	usmf	en-us	SalesInvoice		Show invoice	Okay	1,52	File server	C:\dox42Server\templates\

The following factors can influence the performance of a report:

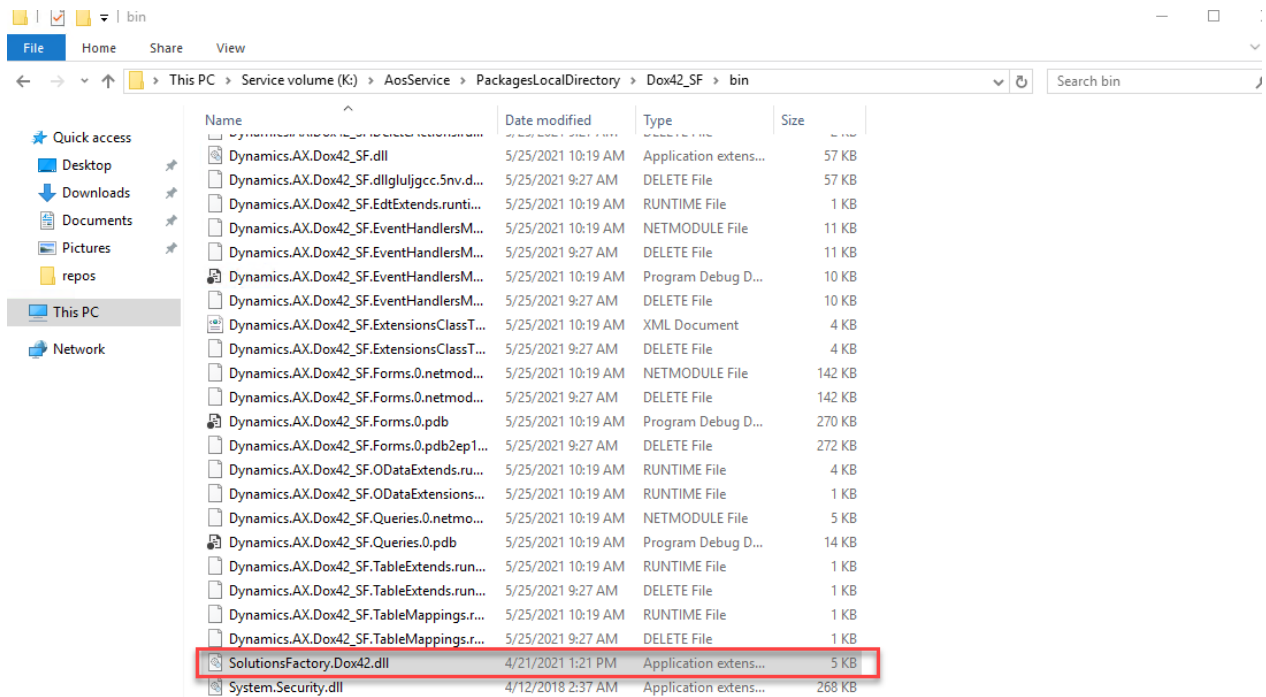
- Using “D365 FSCM Entity” data sources (previously named OData data sources), the responding time from D365 FSCM is longer than for “D365 FSCM Report”. Ideally, data providers or queries in D365 FSCM are enhanced instead of using a “D365 FSCM Entity” data source.
- Parallelism: The dox42 server processes all requests sequentially.
- Nested filtering of DataSources like filtering one DataSource and using the output of the filtered DataSource to filter another DataSource.
- Deactivating unnecessary fields in the “Configure Metadata” window of the dox42 Data Map in the template resulted in noticeable performance gains in several tests.
- It is also a good approach to extend the report logic in D365 FSCM as much as possible instead of using any grouping, transformation, or calculation logic in the dox42 template.
- In case of timeouts, please refer to the dox42 server documentation on timeout settings of the IIS.
- Ensure that the “Cleanup dox42 historical data” batch job is set up.
- If Archive setup for the report is used, you can activate Asynchronous archiving

9.3 Could not load file or assembly “SolutionsFactory.Dox42”

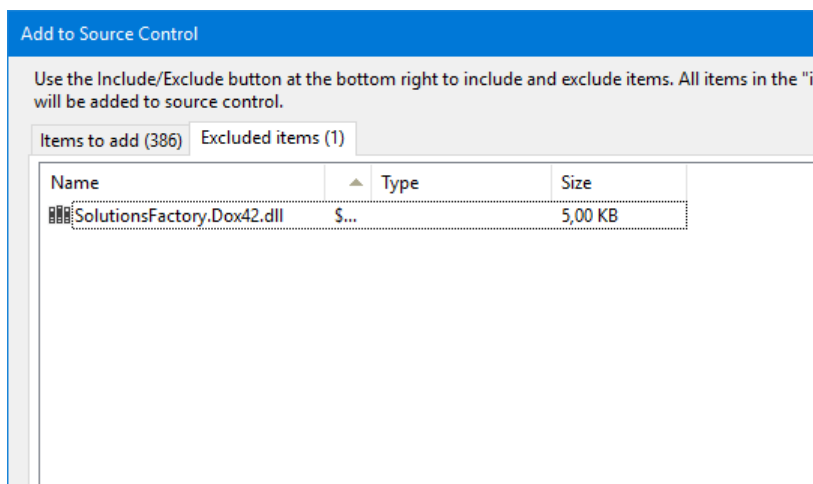
Scenario: Generating a report is aborted with the error message on the screenshot below.



Check that the folder contains the specified DLL and the DLL is checked in.



Reinstall the package if needed and check in the DLL.



9.4 No records in related data for dox42 reports

Scenario: It can happen, that after upgrading to a newer version (D365 FSCM X++ 1.2.13 or latest), there are no records in the related data form for the existing reports:

- **System administration -> Setup dox42 dox42 parameters -> button "Attachments" -> button "Related data"**
- **System administration -> Setup dox42 dox42 parameters -> button "Audit log" -> button "Related data"**
- **System administration -> Setup dox42 dox42 parameters -> button "Document management" -> button "Related data")**.

Run the job Dox42FillReportDataSourcesJob_SF to fix the issue. The job fixes the problem immediately for all legal entities once it has been executed.

https://<AXURL>/?mi=SysClassRunner&cls=Dox42FillReportDataSourcesJob_SF

9.5 Throttling issues

Scenario: Sometimes requests from dox42 server can be throttled by D365 FSCM server:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/priority-based-throttling>

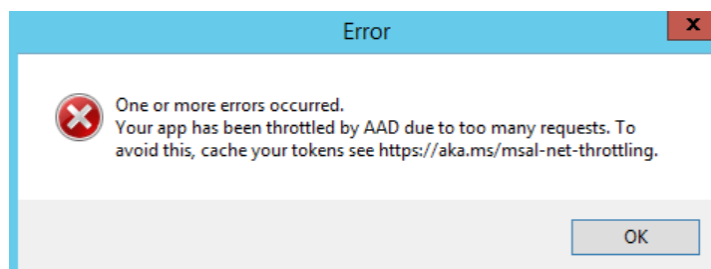
<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/throttling-faq>

It is possible to avoid most of the calls from dox42 server to D365 FSCM server while generating reports by using HTTP method "POST" or "POST (Base64)". HTTP method "POST (Base64)" is recommended. It should be defined in the dox42 server parameters.

The screenshot shows the 'dox42 servers' configuration page in Dynamics 365 Finance and Operations. The page is divided into several sections: 'dox42 servers' (listing server names and REST URLs), 'Setup' (containing 'COMMON SETTINGS' and 'EMAIL SETTINGS'), and 'dox42 Online' (containing 'Generate SharePoint Online certificate', 'Download SharePoint Online certificate', and 'SHAREPOINT ONLINE SETTINGS'). The 'COMMON SETTINGS' section includes fields for 'HTTP Authorization' (Token 6859), 'HTTP method' (POST (Base64)), and 'Token'. The 'EMAIL SETTINGS' section includes fields for 'SMTP user name' (solutionsfactory.at) and 'SMTP password'. The 'SHAREPOINT ONLINE SETTINGS' section includes fields for 'Authentication method' (As User with password (No MFA)), 'SharePoint Online username', 'SharePoint Online password', 'SharePoint Online tenant id', 'SharePoint Online client id', and 'SharePoint Online client secret'.

9.6 Throttling issues with AAD requests

Scenario: Authorization requests from dox42 to AAD are throttled. It may happen if the report template uses "User credentials" for the authorization when designing report templates or running reports in D365 FSCM.



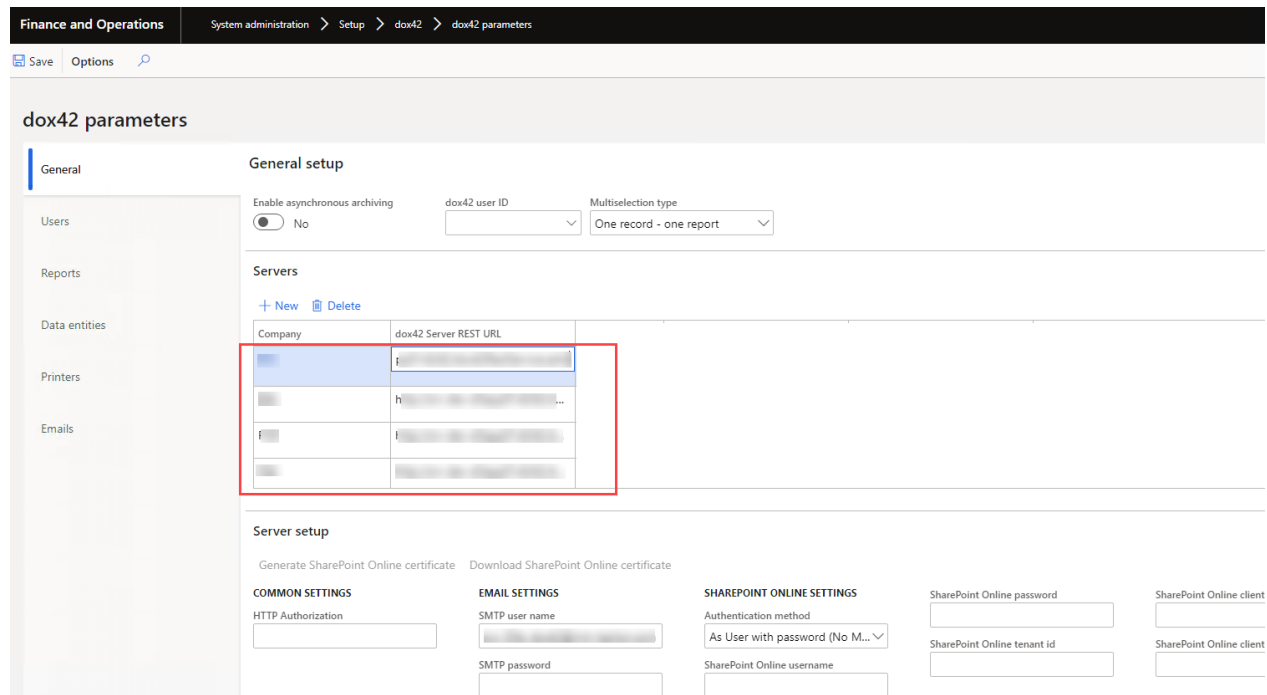
It is recommended to switch the template to use "Client credentials" instead of "User credentials" for the authorization if possible. Another way is to upgrade to the product version 1.4.0 (dox42 server must be version 4.6 or higher).

9.7 DB synchronization issue upgrading to D365 FSCM X++ 1.2.14, D365 FSCM X++ 1.2.14.1 or 1.4.0 and higher

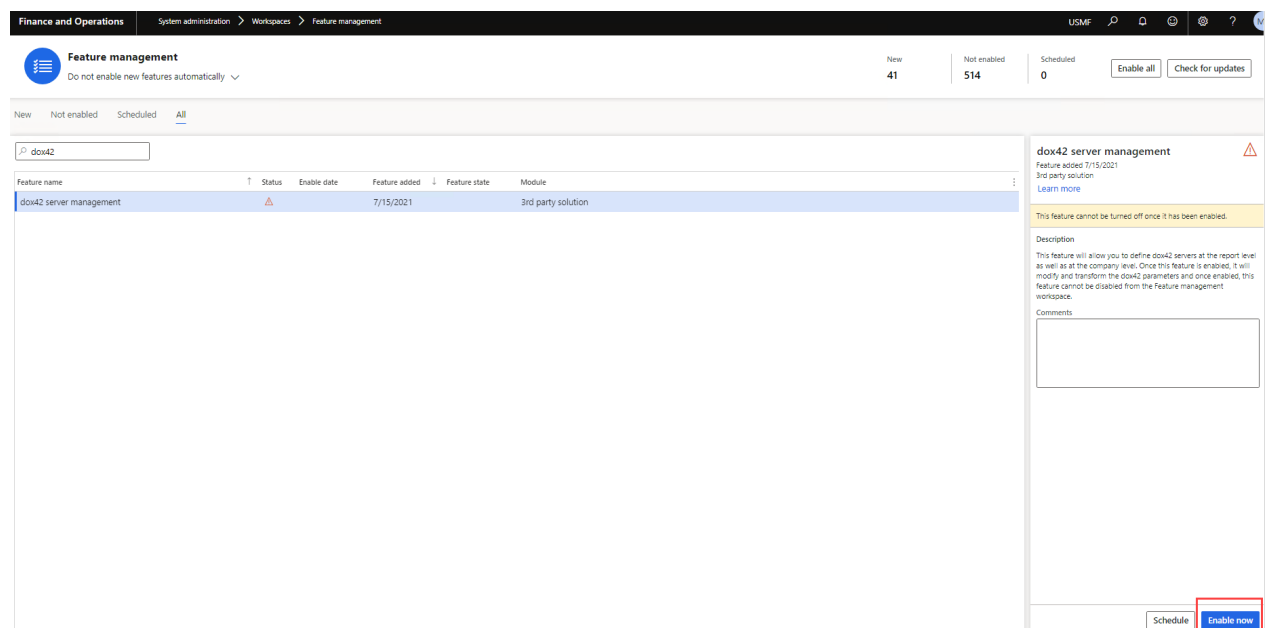
Scenario: There can happen a DB synchronization issue on some environments upgrading from **the version older than D365 FSCM X++ 1.2.14** to the versions D365 FSCM X++ 1.2.14, 1.2.14.1 or 1.4.0 and higher.

There is a data transformation script running automatically while upgrading the version. There are 2 options how to solve it:

Option 1: It is needed to delete dox42 general parameters records ("Servers" tab as it is shown on the screenshot) before installing the new dox42 model. After the new dox42 model is installed, you should newly create them.



Option 2: At first, it is needed to upgrade to any version between D365 FSCM X++ 1.2.14.2 and D365 FSCM X++ 1.3.3 inclusive. After the upgrade, you should activate the new "dox42 server management" feature manually in the "Feature management" form. It can be done at any time later after the delivery of the new version. As soon as it is done, you can upgrade to the version D365 FSCM X++ 1.4.0 or higher.



9.8dox42 server log grows too fast

Scenario: In some cases, dox42 server log can grow too fast and it can take too much disk space.

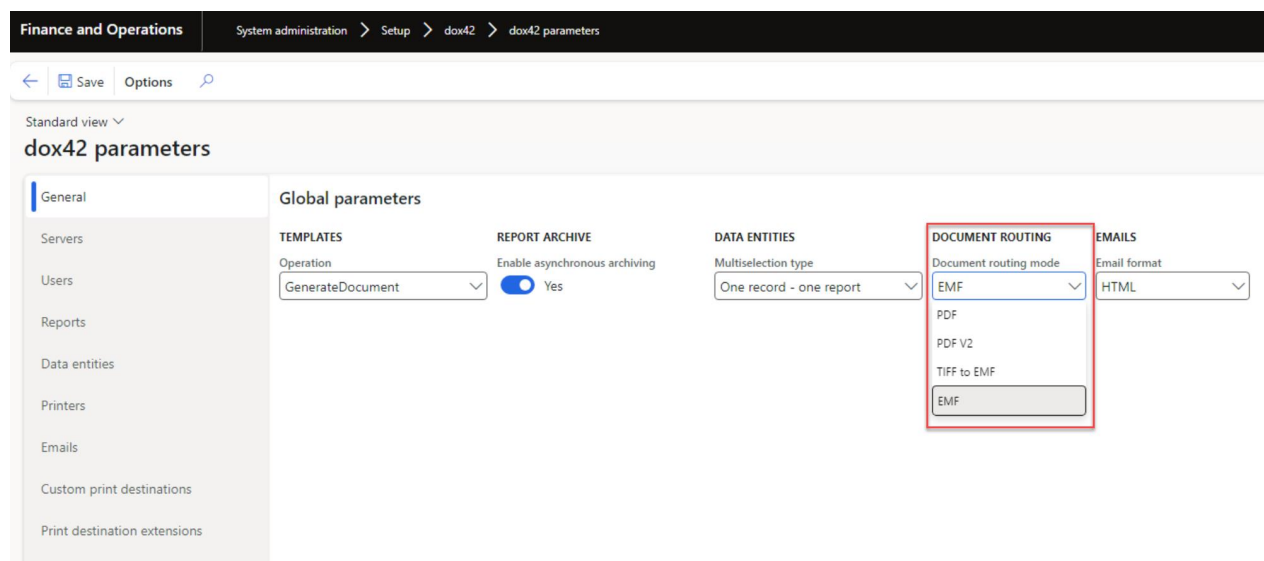
Most likely, the reason is that the logging is set up in the way to be too detailed which is most often not really needed.

For example, when switching to “POST” or “POST (Base64)” HTTP mode, ensure that the dox42 server trace mode is not set to “debug” or “trace”. If it is set to “debug” or “trace”, the log can grow fast, and it can contain some sensitive data.

Configure log settings in the file NLog.config. For further details also look at the dox42 Server Documentation: <https://www.dox42.com/Modules/dox42-Server>.

9.9 Issues with Document Routing Agent (DRA)

If you run into issues using the DRA (running as a service, using redirected printers, etc.), check that the document routing mode parameter is set to “TIFF to EMF” or “EMF” (recommended). When the parameter is set to “PDF” or “PDF V2” the DRA has only limited functionality supported (e.g., “Run as Windows Service” is not supported in this mode).

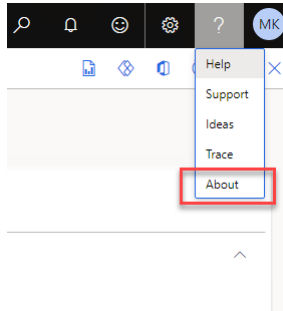


9.10 How to check my dox42 for D365 Finance & SCM

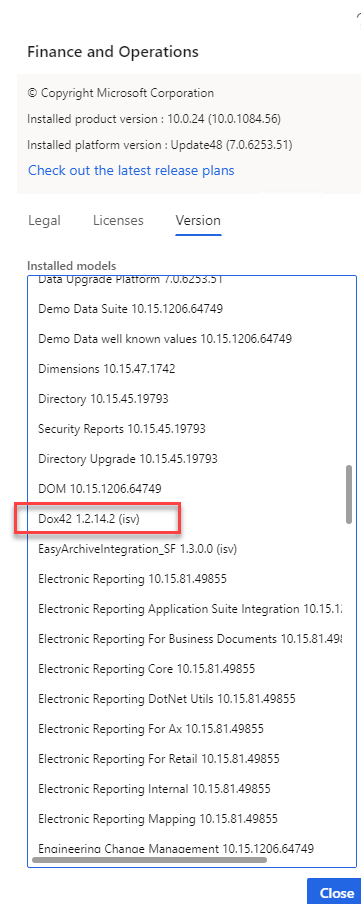
Ensure that, the build numbers of all dox42 for Finance and Operations solution components you use match against your product version. [Version history](#) contains the correspondence between the build numbers and the product version.

9.10.1 D365 FSCM X++ build number

Enter D365 FSCM and click “Help & Support” > “About”.

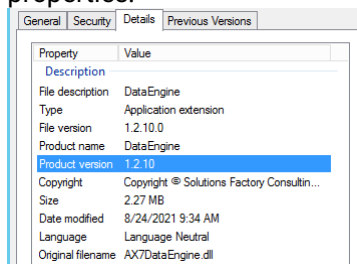


Then open the “Version” tab page and check the version of your dox42 model installed.



9.10.2 dox42 Data Source build number

Find the file AX7DataEngine.dll in the dox42 server /Bin directory and check its version in the file properties.

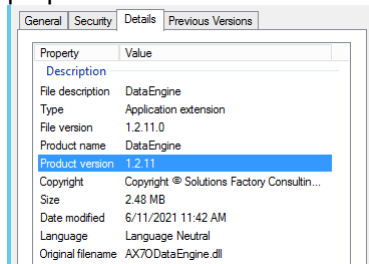


The same should be checked for the dox42 for Finance and Operations Office Add-Ins files:

AX7ConfigDialog.dll
AX7DataEngine.dll

9.10.3 dox42 OData Source build number

Find the file AX70DataEngine.dll in the dox42 server /Bin directory and check its version in the file properties.



The same should be checked for the dox42 for Finance & SCM Office Add-Ins files:

AX70DataConfigDialog.dll
AX70DataEngine.dll

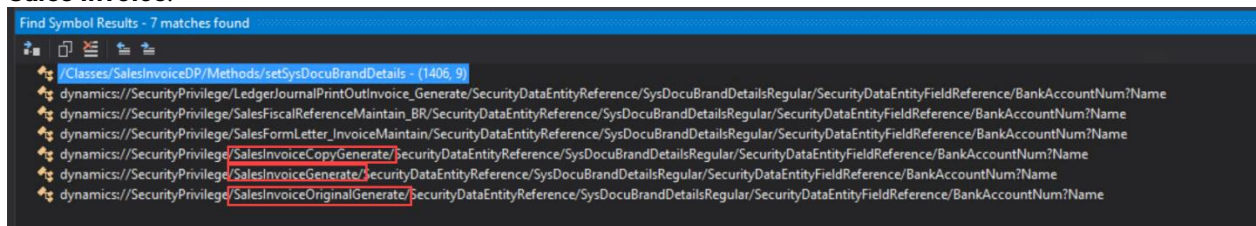
9.11 Error accessing a table field while generating a report after D365 FSCM update

Scenario: Generating a report is aborted with the error message on the screenshot below.

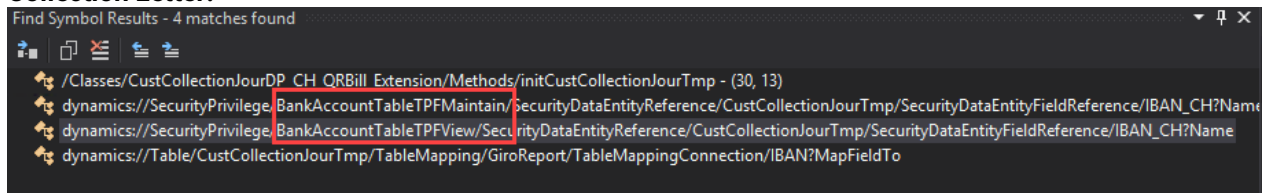


Check standard D365 security privileges related to the field. These privileges should be considered in the user role to be able to print the report.

Sales Invoice:



Collection Letter:



9.12 Error that file type cannot be attached

Scenario: Generating a report is aborted with the error message "File with this file type cannot be attached".

Message details

Document processing

dox42 output processing

dox42 print destination request

dox42 server call

- ✗ Files with this file type cannot be attached.
- ✗ 'dox42 server call' failed.
- ✗ 'dox42 print destination request' failed.
- ✗ Error occurred while printing report

Check what exactly the file type you are trying to print. For example, if you print to printer and the document routing mode is set to "TIFF to EMF" in the dox42 parameters, then the system requests dox42 server to get a TIFF file. If you print to printer and the document routing mode is set to "EMF" in the dox42 parameters, then the system requests dox42 server to get a zip-archive with EMF files in it.

Standard view ▾

dox42 parameters

General

Users

Reports

Data entities

Printers

General setup

Global parameters

REPORT ARCHIVE

Enable asynchronous archiving

☒ Yes

DATA ENTITIES

Multiselection type

Many records - one report ▾

DOCUMENT ROUTING

Document routing mode

TIFF to EMF ▾

Servers

Check in the document management parameters (Organization administration -> Document management -> Document management parameters) that the file type you use is added to the file types that can be uploaded.

Finance and Operations | Organization administration > Document management > Document management parameters

Save Options

Standard view ▾

Document management parameters

General

Number sequences

File types

SharePoint

Migrate files

Default document types

Configure file types that can be uploaded

+ Add - Remove Reload defaults

File type	Description	Natively web-renderable
AVI	Video clip	No
BMP	Bitmap image	Yes
CSV	Microsoft Excel comma separate...	No
DOC	Microsoft Word document	No
DOCX	Microsoft Office Word 2007 doc...	No
GIF	Graphics interchange format im...	Yes
HTM	HTML file	Yes
HTML	HTML file	Yes
JPEG	JPEG image	Yes
JPG	JPG image	Yes
MHT	MHT file	Yes
MHTML	MHTML file	Yes
MSG	Microsoft Outlook message	No
PDF	Adobe Acrobat document	Yes
PNG	PNG image	Yes
PPT	Microsoft PowerPoint presentati...	No
PPTX	Microsoft Office PowerPoint 200...	No
RTF	Rich text format	No
SGML	SGML file	Yes
TIF	Microsoft office document imag...	Yes
TIFF	TIFF image	Yes
TXT	Text document	Yes

9.13 Potentially dangerous values when using HTTP method POST

Scenario: Generating a report is aborted with the error message "...A potentially dangerous Request.Form value was detected from the client..." in the dox42 server logs and the HTTP method is set to "POST" for the dox42 server in the "dox42 servers" form.

Switch to the HTTP method "POST (Base64)". Available since version 1.3.2.

The screenshot shows the 'dox42 servers' configuration page. The 'HTTP method' is set to 'POST (Base64)', which is highlighted with a red box. The page also shows 'COMMON SETTINGS' and 'EMAIL SETTINGS' sections.

COMMON SETTINGS		EMAIL SETTINGS	
HTTP Authorization	Token 6859	SMTP user name	solutionsfactory.at
HTTP method	POST (Base64)	SMTP password	*****

Below the settings, there is a section for 'dox42 Online' with options to 'Generate SharePoint Online certificate' and 'Download SharePoint Online certificate'. The 'Generate SharePoint Online certificate' section includes fields for 'SharePoint Online username', 'SharePoint Online password', 'SharePoint Online tenant id', 'SharePoint Online client id', and 'SharePoint Online client secret'.

9.14 Invalid dox42 Online certificate after database copy

Scenario: After an update of the environment (restoring the database from a different environment) an error occurs while generating a report "Client assertion contains an invalid signature. The key was not found".

1. When setting up the environment, you click on "Generate SharePoint Online certificate" in System administration > setup > dox42 > dox42 servers. After that, you should copy this certificate key and securely save it somewhere for being able to use the key further.

dox42 servers

server name

ip

MON SETTING

Authorization

method

SharePoint Online certificate key

MIII+QIBAzCCCLkGCS...



Close

dox42 Online

[Generate SharePoint Online certificate](#)
[Download SharePoint Online certificate](#)
[Restore SharePoint Online certificate](#)

- After the database is restored, you should click on “Restore SharePoint Online Certificate” in dox42 servers (System administration > setup > dox42 > dox42 servers) and apply there the certificate key that you copied before.

Finance and Operations | System administration > Setup > dox42 > dox42 servers

Save + New Delete Options

Filter

dox42 server

11

Default
https://dox42server.northeurope.cloudapp.azure.com/

dox42Server-2
https://dox42server-2.northeurope.cloudapp.azure.com/

KSI
XXXX

USRT
https://solutionsfactorydemo.dox42.online/

Standard view

dox42 servers

dox42 server name: dox42 server | dox42 Server REST URL: URL

Setup

COMMON SETTINGS

HTTP Authorization: |

HTTP method: GET

EMAIL SETTINGS

SMTP user name: |

SMTP password: |

dox42 Online

[Generate SharePoint Online certificate](#) [Download SharePoint Online certificate](#) [Restore SharePoint Online certificate](#)

SHAREPOINT ONLINE SETTINGS

Authentication method: As Azure application

Certificate thumbprint: B56D232D3F4E43516CED7472D...

SharePoint Online tenant id: |

SharePoint Online client id: |

Here is a summary of necessary steps for inserting certificate to authenticate SharePoint online for the dox42 server:

The screenshot shows the 'dox42 servers' configuration page. It includes sections for 'COMMON SETTINGS', 'EMAIL SETTINGS', and 'dox42 Online'. The 'dox42 Online' section contains 'SHAREPOINT ONLINE SETTINGS' with fields for 'Authentication method', 'Certificate thumbprint', 'SharePoint Online tenant id', and 'SharePoint Online client id'. Red circles and arrows are used to highlight specific fields: 1. Authentication method (As Azure application), 2. Generate SharePoint Online certificate, 3. Filter, 4. SMTP user name, 5. Certificate thumbprint, 6. SharePoint Online tenant id, 7. SharePoint Online client id.

9.15 No dox42 output in print destination settings dialog for custom report

Scenario: There is no dox42 output visible in the print destination settings dialog for the custom report.
Print destination settings

The screenshot shows the 'Print destination settings' dialog. The 'Email' option is selected in the left sidebar. The main area shows fields for 'To', 'Cc', 'Subject', and 'File format' (HTML4.0). A red box highlights the 'Email' option in the sidebar.

Make sure that the following variables initialized properly in the "SRSPrintDestinationSettings" class with your custom code when you call the print destination settings dialog:

1. dox42ReportName – report name
2. dox42ReportDesignName – report design name

```
SRSPrintDestinationSettings printDestinationSettings = new SRSPrintDestinationSettings(printerSettings);

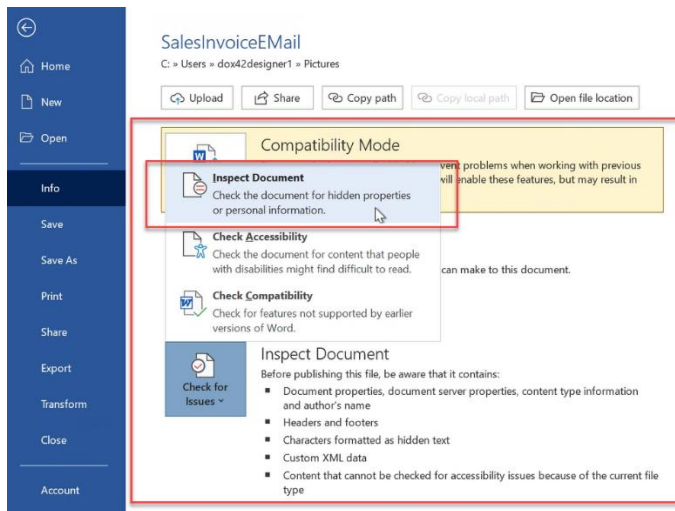
if (!printDestinationSettings.dox42ReportName)
{
    [printDestinationSettings.dox42ReportName, printDestinationSettings.dox42ReportDesignName] =
        SrsReportRunUtil::getReportAndDesignName(ssrsReportStr(CustomReportName, CustomReportDesignName));

    printerSettings = printDestinationSettings.pack();
}
```

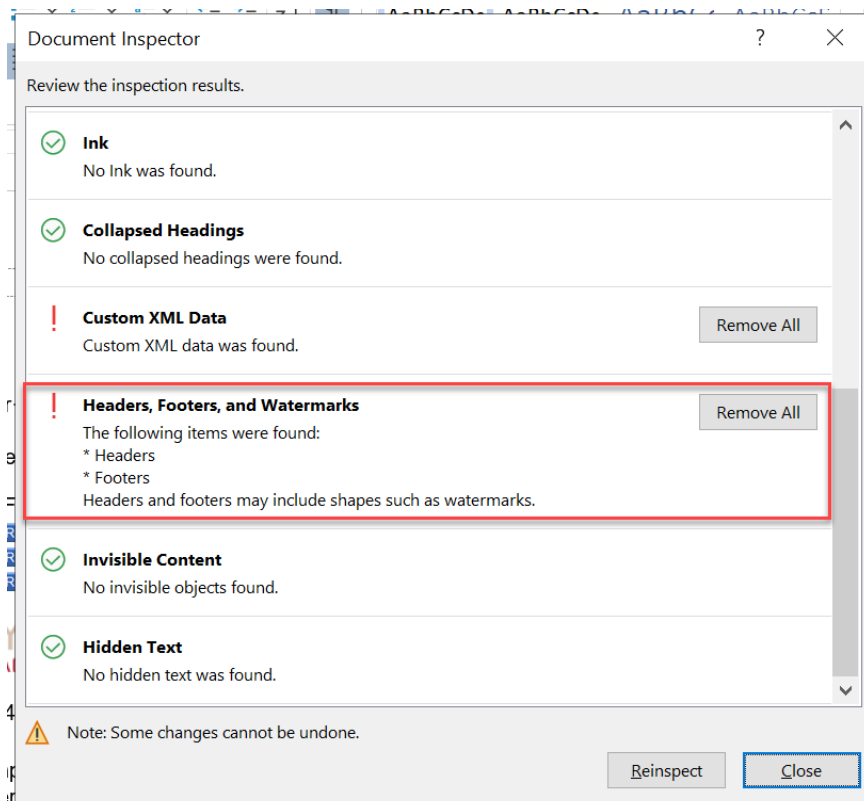
9.16 Inspection of the word template on dox42 server for hidden/invisible content

Scenario: Generating a report is aborted with the error message/report is created not in the correct way

You can inspect and fix the template using the inspection tool functionality in Word



Document Inspector after the analysis will show you the results:



9.17 Report is printed successfully but not displayed on screen

Scenario: Under certain conditions, after upgrading to a new version, there may be a problem displaying reports when printing to screen. This issue may affect Tier-1 (Single-box) environments due to a specific deployment process.

We can't find that page

Sorry, we can't find the page that you requested.

Things to try:

- Verify that the URL that you entered is correct.
- Return to the home page and use the navigation pane to find what you are looking for.
- Go to the App links page to find the page that you are looking for.

To solve the issue, replace the resource file Dox42ReportViewer_SF.htm manually in your *WebRoot* directory of the IIS-server (for example, *K:\AosService\WebRoot\Resources\Html\Dox42ReportViewer_SF.htm*) with the latest version of the file from your *PackagesLocalDirectory* (for example, *K:\AosService\PackagesLocalDirectory\Dox42_SF\Dox42_SF\AxResource\ResourceContent\Html\Do x42ReportViewer_SF.htm*).

9.18 Data entity cannot be selected in dox42 parameters

Scenario: Data entity is not present in the lookup of the available data entities in the dox42 parameters form.

The screenshot shows the 'dox42 parameters' form. On the left is a navigation pane with 'Data entities' selected. The main area is titled 'Data entities setup' and contains a table with columns: 'Enabled', 'Company', 'Root data entity', 'Label', and 'Help text'. The first row is selected, showing 'VendVendorV2Entity' as the 'Root data entity' and 'Vendors V2' as the 'Label'. Below this, a dropdown menu is open, showing a list of 'Data entity name' and 'Entity name' pairs. The list includes 'VendVendorParametersEntity' (Vendor parameters), 'VendVendorPaymentFineCodeEntity' (Vendor Payment Fine Code), 'VendVendorPaymFeeGroupEntity' (Vendor payment fee groups), 'VendVendorReasonsEntity' (Vendor reasons), 'VendVendorRequestNewCategoryEntity' (Vendor requests), and 'VendVendorV2Entity' (Vendors V2). The 'VendVendorV2Entity' is highlighted at the bottom of the list.

Make sure the data entity you are looking for is public. Only public data entities can be used for the integration with dox42 using OData services.

For more information about public data entities, see the D365 FSCM documentation:

Property	Value	Description
IsPublic	Yes	When this property is set to Yes, the entity is visible by using the OData application programming interface (API).
Public Entity Name	FleetRental	The name that will be used in the OData APIs for EntityType .
Public Collection Name	FleetRentals	The name that will be used for the OData collection entity.

10 Version history

Product version	Availability	Build number			What's new
		D365 FSCM X++	dox42 Data Source	dox42 OData Source	
2.0.0.2	16.06.2025	2.0.0.2	2.0.0.1	2.0.0.1	D365 FSCM: <ul style="list-style-type: none"> Fixed issues in the "Cleanup dox42 historical data" functionality. The "Usage data" for the operation must be reset in the user options. The batch jobs must be recreated if they are used Fixed issues in the "Export dox42 data" and "Import dox42 data" functionality. The "Usage data" for the operation must be reset in the user options
2.0.0.1	30.04.2025	2.0.0.1	2.0.0.1	2.0.0.1	D365 FSCM: <ul style="list-style-type: none"> Advanced functionality for the print destination extensions and custom output actions Improved compatibility with the dox42 server when generating XML-files dox42 server/client: <ul style="list-style-type: none"> Fixed bugs in the user interface Updated D365 FSCM data source logo
2.0.0	01.03.2025	2.0.0	2.0.0	2.0.0	dox42 version 5 is recommended D365 FSCM: <ul style="list-style-type: none"> Electronic Reporting (ER) integration Supporting dox42 PDF eInvoice attachments in the standard D365 FSCM functionality Bug fixes to support Finance insights in D365 FSCM Improvements in the dox42 audit log Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Supporting dox42 version 5 user interface and features Various improvements, bug fixes and technical updates
1.5.0	16.02.2024	1.5.0	1.2.17	1.2.18	dox42 server must be version 4.6.4 or higher D365 FSCM: <ul style="list-style-type: none"> Extended conditional archiving capabilities (depending on the field value in the dox42 report template) Improvements in the dox42 audit log form Bug fix for handling some special characters when sending reports via e-mail Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Query length is no longer limited when using the D365 FSCM entity data source (OData)
1.4.1.1	30.08.2023	1.4.1.1	1.2.17	1.2.17	D365 FSCM: <ul style="list-style-type: none"> Hotfix for the asynchronous archiving
1.4.1	25.08.2023	1.4.1	1.2.17	1.2.17	dox42 server must be version 4.6.2 or higher D365 FSCM: <ul style="list-style-type: none"> "EMF" mode for the Document Routing Agent (DRA) Using custom print destinations for archiving Sending document copies in one printing job when using PDF format for the Document Routing Agent (DRA) Supporting special characters in the email subject for the "D365 Server" and "D365 User" sending modes Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Add-Ins: Selecting/deselecting all fields on the entity data source setup form in one click Various improvements, bug fixes and technical updates
1.4.0	17.02.2023	1.4.0.2	1.2.16	1.2.16	dox42 server must be version 4.6 or higher D365 FSCM: <ul style="list-style-type: none"> "dox42 integration framework" – calling D365 FSCM reports from external systems (e.g., Power Automate, etc.)

					<ul style="list-style-type: none"> Supporting dox42 custom output actions as print destinations or to extend existing dox42 print destinations [BETA] Expanded and enhanced audit log capabilities Email body format (HTML or plain text) Setting up translations for buttons to call data entity reports New OData entity to get latest report transaction id Button to delete report metadata in D365 FSCM Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Potential AAD throttling issues when using client credentials
1.3.3	05.10.2022	1.3.3	1.2.15	1.2.15	D365 FSCM: <ul style="list-style-type: none"> Excel and PowerPoint report templates Expanded and enhanced audit log capabilities Ability to use/restore existing SharePoint Online certificates Caching printed reports (optional) [BETA] Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Migration from the Azure Active Directory Authentication Library (ADAL) to the Microsoft Authentication Library (MSAL)
1.3.2	07.07.2022	1.3.2	1.2.14	1.2.14	D365 FSCM: <ul style="list-style-type: none"> Sign PDF documents Save printed report in document management enhancements Cleanup historical data function improved Audit log form improved Potential errors when using HTTP method POST Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Add-Ins: Filtering entity columns on the entity data source setup form Potential errors when using HTTP method POST Various improvements, bug fixes and technical updates
1.3.1	22.04.2022	1.3.1	1.2.13	1.2.13	D365 FSCM: <ul style="list-style-type: none"> Full support of Document Routing Agent (DRA) Save printed report in document management enhancements Set up SharePoint file names on the report level "nl-be" and "da" labels Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> Caching bug fix Bug fix for using "#" in OData filters
1.3.0	19.01.2022	1.3.0	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Attach files to dox42 report (adding to layout / sending per email) Preview serialized report data directly in D365 FSCM Various improvements, bug fixes and technical updates
1.2.14.2	18.10.2021	1.2.14.2	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Fix for deployable package error "de-ch" labels
1.2.14.1	07.10.2021	1.2.14.1	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Improvements to save printed report in document management Various improvements, bug fixes and technical updates
1.2.14	01.10.2021	1.2.14	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Improvements of roles and permissions
1.2.13.3 [BETA]	08.09.2021	1.2.13.3	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Improvements of advanced dox42 server management
1.2.13.2 [BETA]	30.08.2021	1.2.13.2	1.2.12	1.2.12	D365 FSCM: <ul style="list-style-type: none"> Save printed report in document management Advanced dox42 server management Push report data to dox42 server

					<ul style="list-style-type: none"> • Allow start email subject with backslash • Special characters in email subject • Allow to print report if e-mail password cannot be decrypted • Lookup to select report design
1.2.13.1	04.08.2021	1.2.13	1.2.11	1.2.12	dox42 server/client: <ul style="list-style-type: none"> • Throttling handling
1.2.13	18.06.2021	1.2.13	1.2.10	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Print to "docx" files • Use Excel templates to print reports to "xlsx" files • Improvements to multiselect on forms for OData reports • Improvements to attach files to dox42 report (adding to layout) [BETA]
1.2.12	31.05.2021	1.2.12	1.2.9	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Manage document type for attachments • Attach files to dox42 report (adding to layout) [BETA] • Reference to report source in dox42 audit log • Print to "csv" files • Multiselect on forms for OData reports (print one report) • Increased report printing timeout • Performance - parallel dox42 calls when archiving dox42 server/client: <ul style="list-style-type: none"> • Performance optimization through caching for dox42 Data Source
1.2.11	30.03.2021	1.2.11	1.2.8	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Bug fixes for email subject
1.2.10	05.02.2021	1.2.10	1.2.8	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Multiselect on forms for OData reports (print multiple reports) • Bug fixes for email subject • Various improvements, bug fixes and technical updates
1.2.9	22.01.2021	1.2.9	1.2.8	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Reversed packing slips printing • Print multiple copies • Bug fixes for email subject
1.2.8	17.12.2020	1.2.8	1.2.8	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Skip downloaded file when not in GUI • Print picking list from transfer order • Improvements for roles and permissions
1.2.7	30.11.2020	1.2.7	1.2.8	1.2.11	D365 FSCM: <ul style="list-style-type: none"> • Use Excel templates to print reports to "xls" files • Provide additional extensibility in D365 FSCM X++ code • Various improvements, bug fixes and technical updates dox42 server/client: <ul style="list-style-type: none"> • Add "Show/Hide" checkbox for secrets • Performance improvements for dox42 OData Source • Various improvements, bug fixes and technical updates
1.2.6	26.06.2020	1.2.6	1.2.5	1.2.5	--
1.2.5	01.04.2020	1.2.5	1.2.5	1.2.5	--
1.2.4	12.03.2020	1.2.4	1.2.3	1.2.3	--
1.2.3	01.07.2019	1.2.3	1.2.3	1.2.3	--
1.2.1	17.05.2018	1.2.0	1.2.2	1.2.2	--
1.2.0	04.04.2018	1.2.0	1.2.0	1.2.0	--
1.1.3	30.10.2017	1.1.4	1.1.1	1.1.2	--
1.1.2	12.06.2017	1.1.1	1.1.0	1.1.1	--
1.1.1	02.06.2017	1.1.1	1.1.0	1.1.0	--
1.0.1	20.12.2016	1.0.1	1.0.1	1.0.1	--

11 Upgrade/Update

It is strongly recommended to upgrade dox42 server and client components first and only after that to start upgrading D365 FSCM. This is because the dox42 server and client libraries are usually guaranteed to be backwards compatible. In case of exceptions to the rule, there will be further announcements.

11.1 Upgrade/Update of the dox42 Office Add-Ins

The download files for the dox42 Enterprise Add-Ins are available on the dox42 website:

<https://www.dox42.com/Modules/Download>

Upgrade dox42 Word Add-Ins according to the dox42 documentation.

11.2 Upgrade/Update of the dox42 for D365 Finance & SCM Office Add-Ins

Replace the files in the directory, where the dox42 for D365 Finance & SCM Office Add-Ins is installed, with the new version:

```
AX7ConfigDialog.dll
AX7DataEngine.dll
AX7DataSourceImport.config
AX7ODConfigDialog.dll
AX7ODDataEngine.dll
AX7ODDataSourceImport.config
D365O_logo.png
```

11.3 Upgrade/Update of the dox42 Server

Upgrade the dox42 Server according to the documentation on the dox42 Website:

<https://www.dox42.com/Modules/dox42-Server>

11.4 Upgrade/Update of dox42 for D365 Finance & SCM for dox42 Server

Replace the dox42 for Finance and Operations files in the /Bin directory on the dox42 Server with the new version:

```
AX7DataEngine.dll
AX7ODDataEngine.dll
```

11.5 Upgrade/Update of dox42 in D365 FSCM

Upgrade D365 FSCM with the new version of the “dox42” package. You could either install the Deployable Package or the Source Code (available on request from support@dox42.com). The Deployable Package contains the binaries only, the Source Code can be useful in case you want to develop your own extensions or if you want to debug something.

You will find further information on <https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/deployment/apply-deployable-package-system> as well as <https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/dev-tools/manage-runtime-packages>.

After successfully upgrading the “dox42” package, the next step is to configure D365 FSCM to work with the dox42 Server.

Some releases may contain separately designed D365 FSCM features to control the lifecycle of the feature. Such features can be managed in the standard D365 FSCM way in the “Feature management” workspace.

New features should be activated manually, otherwise they may be activated automatically in one of the next releases. Also, some features can be auto-activated immediately during the deployment processing. See this table for more details:

Feature	Notes	Released in version	Set to auto-activated in version
dox42 solution update v.1.5.1	This feature cannot be disabled from the Feature management workspace.	2.0.0	n/a
dox42 solution update v.1.3.1	This feature cannot be disabled from the Feature management workspace.	1.3.1	1.3.1
dox42 server management	This feature will allow you to define dox42 servers at the report level as well as at the company level. Once this feature is enabled, it will modify and transform the dox42 parameters and once enabled, this feature cannot be disabled from the Feature management workspace.	1.2.13.2	1.4.0

12 Support

Should you have any questions, please do not hesitate to contact support@dox42.com. We are happy to help you!

Good luck with dox42!

Your dox42 Team