

Document Archive

1.0.0.0

IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

USER SCENARIO DOCUMENTATION



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Change Log

| Version number | Date | Description |
|----------------|------------|--------------------------|
| V1.0.0.0 | 01-02-2021 | Initial released version |



Introduction

A paperless office (or paper-free office) is a work environment in which the use of paper is eliminated or greatly reduced. This is done by converting documents and other papers into digital form, a process known as digitization.

Are you ready to digitize your processes and move to a paperless office with just a few clicks? Then start now with *Document Archive*!

Document Archive provides the storage of attachments on master data like customers, vendors & items, but also on your purchase and sales documents. Of course these attachments are transferred to posted documents as well.

This with an easy drag-and-drop method to prevent unnecessary actions like saving on your desktop before storing it in Microsoft Dynamics 365 Business Central.

With the additional features of document categories and permission by document category you are in complete control of how the attachments are organized and who can access & modify them.

Document Archive stores the data in an online environment (like SharePoint). This ensures that you access your attachments at any time and at any place!

See a list of the full features below.

Features & Benefits

- ✓ Easy storage with drag-and-drop functionality
- ✓ Drag-and-Drop directly from Microsoft Outlook
- ✓ Available on more than 95 pages for master data like customers, vendors & items, documents and posted documents of purchase & sales and more!
- ✓ Use document categories to organizing your attachments
- ✓ Set up permissions per document category and user group
- ✓ Online storage options like SharePoint
- ✓ Set up easily with a wizard for a quick start

This app supports both the Essential and Premium editions of Microsoft Dynamics 365 Business Central.



Free to Try

This extension can be used for free, without limitations in one or more of your Dynamics 365 Business Central *Sandbox* environments. When you use the features that would require a subscription for use in one of your *Production* environments, a notification will be displayed that informs you that you are using such a feature.

To use all the features of the extension in a *Production* environment you can start a free trial subscription that will automatically change to a paid subscription after the trial ends. You can cancel your subscription at any time you like and will be able to use the features of the app until the current invoicing period ends.

To manage your subscriptions, you can use the *Apportunix Subscriptions* page. On this page you can start or cancel subscriptions for Apportunix apps and view or update the payment methods that are used for your subscriptions.

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| App Name | Plan Name | Status | Start Date | End Date | Trial Start Date | |
| Document Archive | EUR | Active | 1/14/2021 2:54 | I PM | | |
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Please note that your payments are handled safely, in a PCI-compliant manner, in cooperation with our payment provider <u>Stripe</u>. For more information, please feel free to contact us by visiting the <u>Contact</u> page on our website.



Installation

The *Document Archive* extension can be installed from the Extension Marketplace (AppSource). To install the extension, please follow the following steps:

- 1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
- 2. Open the Extension Marketplace (AppSource) via: Manage > Extension Marketplace



- 3. Search for and select "Document Archive" (By Apportunix)
- 4. Please take note of the End-User License Agreement and Privacy Statement
- 5. Choose **FREE TRIAL**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.



Permissions Configuration

After the *Document Archive* extension has been installed, a permission set for the extension will have been added to your Business Central environment.

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This permission set should be assigned to relevant users or user groups.

To assign the permission set to users:

1. Select the magnifying glass icon (*Tell Me*) on the top right corner of Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.



2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.



- 3. Choose the Edit action to open the User Card page.
- 4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with the permission set for the Document Mail Queue extension.

For more information, please refer to Dynamics 365 Business Central documentation - <u>Managing</u> <u>Users and Permissions</u> Microsoft Dynamics 365 Business Central Document Archive Version 1.0.0.0



Setup & Usage

This chapter provides details about how to set up and use the functionality of this extension and will present several examples and scenarios to demonstrate the functionalities. A basic understanding of how to work with Microsoft Dynamics 365 Business Central is presumed.

Document Archive Setup Wizard

Document Archive has an integrated setup wizard to assist you with the initial configuration of the app. It Is recommended to use the setup wizard.

1. Find and open the *Document Archive Setup Wizard* in *Tell Me*

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| Go to Pages and Tasks | | | | | | | l |
| > Document Archive Setup Wizard | Administration | | | | | | l |
| Didn't find what you were looking for? Try exploring | | | | | | | |
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2. Read the introduction and click on Next





3. Read the notes of the subscription and click on Next

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| Sales Orders Ite | ems Customers | Document Archive Se | tup Wizard | | 2 X | 1 | | | | 2 | | |
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| Good | arterno | Subscription To use the app in a Production e | environment you r | eed to set up a subscrip | tion. | mo)) | Reports History | 5 | | | | |
| • 0 | | Sandbox You are currently working in a Sa features without any restrictions | andbox environme s! | ent which means you can | use all | L | | | | | | |
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4. Choose your preferred *File handler* and click on *Next*

Note: currently it is only possible to store documents in SharePoint. More options will come available in new versions

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| CRONUS International Ltd. | Sales -> Purchasing -> Inventory -> Posted Documents -> Setup & E | Extensions \smallsetminus | = | | |
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| | \$ | der > Sales | | | |
| Good alterne | Select a File Handler First, let's select the type of file handler to use for your file attachments. | no > Reports > History | 5 | | |
| | File Handler · · · · · SharePoint 🗸 | | | | |
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5. Create an Azure App Registration and click on Next.

During the Azure App Registration, please set up the required API Permissions as listed in the wizard.

To assist you with the *Azure App Registration*, please use the following documentation from Microsoft: Quickstart: Register an app in the Microsoft identity platform | Microsoft Docs.

User Tasks

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Approval

6. Edit and complete the OAuth 2.0 configuration by clicking on the *Edit* button.

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| • 0 | OAuth 2.0 We have already preconfigured some of the settings for you. Please choose Edit ar complete the configuration with your credentials. | nd | | | | | |
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- 7. Perform the following steps in the next page and click on *Next:*
 - a. The fields *Code* and *Description* are filled in with a default value, but can be changed manually.
 - b. Fill in the *Application / Client ID* and the *Client Secret* which are provided during the *Azure App Registration* of step 5.
 - c. Grant Type is set up with *Authorization Code* as default and as preferred grant type. Can be changed manually to your preferences.

apportunix



d. Authorization URL and Access Token URL are filled in based on your working environment (i.e., for your current AAD tenant), but can be changed if necessary.e. Close the OAuth 2.0 Application page with Close.

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| CRONUS International Ltd. Sales >> Purchasing >> Inventory >> Posted Documents >> Setup & Exte | ensions 🗸 | = | = | | | |
| Sales Orders Edit - OAuth 2.0 Application - DCA_SHAREPOINT | 2 | \times | | 2 | я | |
| Headline Manage 🔒 Request Access Token 😒 Refresh Access Token 🤮 Apply Default Settings | | | | | | |
| Good General | | | | | | |
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8. After clicking on *Next, Document Archive* will validate the connection and credentials set up and will provide a message when the authentication is successful.

Please fix the *OAuth 2.0 Application* if there is an error given by checking the error message. Close the message by clicking on *OK*

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| Headline | Document Archive Setup Wizard | 2 X | | | | |
| Cood offering | 聯 | Je | er > Sales | | | |
| Good alterno | Set up SharePoint File Handler | n | no > Reports | | | |
| | Now, we can configure the settings for the SharePoint file hand | ler. | History | | | |
| • 0 | Dr Authenticated successfully. | | | | | |
| Activities ~ | Sit | | | | | |
| For Release | Sit | ок | urns | | | |
| Sales Quotes - Sales Orders - Open | Dr | a | iles Return O Open | Sales Credit N - Open | l | |
| 0 20 | Drive Name | | | 1 | | |
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Fill in the Site ID and Drive ID of the preferred SharePoint page.
 The options available are linked to your Office environment.
 If you create a new site and drive during this setup, you can refresh the available sites and

drives by clicking the Refresh button

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| CRONUS International Ltd. | Sales | ensions \vee | = | = | | | |
| Sales Orders Items Customers | Document Archive Setup Wizard | | | | 2 | | |
| Headline | © jer | er > Sales | ; | | | | |
| Good alterne | Set up SharePoint File Handler Now, we can configure the settings for the SharePoint file handler. | o > Repo > Histo | orts ory | | | | |
| | Destination Configure where you want your files to be stored. | | | | | | |
| Activities ~ | Site ID · · · · · · wsbtestramon.sharepoint.com,fe4a1678-84 · · | | | | | | |
| For Release | Site Name BC_DocArchive tur | rns | | | | - | |
| Sales Quotes - Sales Orders - Open Open | Drive ID · · · · · · · · bleBZK_iuEUUm2kjS32ThWv6Oc0ncmvTtKI · · · | es Return O Den | Sales - Ope | Credit M en | | | |
| 0 20 | Drive Name · · · · · · Documents |) | 1 | | | | |
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10. Check the following default setup and change if preferred. Details of the following setup will be listed further on in the manual.

| Click on Next to proceed with | n the wizard. | |
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| CRONUS International Ltd. | Sales - Purchasing - Inventory - Posted Documents - Setup & E | xtensions v 📔 🚍 |
| Headline | Document Archive Setup Wizard $\checkmark \times$ | 2 |
| Good afterno | | ier > Sales |
| | Set up General Settings Finally, let's configure the general settings for the app. | > History |
| | General FactBox Type · · · · · · Files | |
| Activities ~ | Categories | |
| For Release | Category Selection Method · · · · · Use default | turns |
| Sales Quotes - Sales Orders - Open Open | Default Category · · · · · · DEFAULT V | ales Return O Sales Credit M Open - Open |
| <u>0</u> <u>20</u> | Files File No. Series ····· DCA ✓ | D 1 |
| User Tasks Email Sta | Back Next Finish | |
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11. Click on Finish to finish the setup and start using *Document Archive*.

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| Sales Orders Items Customers Headline | Document Archive Setup Wizard Z X | ier > Sales | 2 | * | | |
| Good afterno | Set up General Settings Finally, let's configure the general settings for the app. | mo > Report > Histor | ts V | | | |
| | General FactBox Type · · · · · · · Files | | | | | |
| Activities ~ For Release | Category Selection Method · · · · · Use default | turns | | | _ | |
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| llser Tasks Fmail Str | Back Next Finish | | | | | |
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| User Tasks My User Tasks Pending User Failed Email | File No. SeriesDCA V Back Next Finish Back Approvals Ils in Draft Emails in Sert Emails Last Requests Sent Request | ts to | → → | | | |

12. If you want to set up additional permissions for user groups you can access this page directly by clicking on *Yes* in the following message.

If you want to this later on, click on No.

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| Sales Orders Items Customers | Document Archive Setup Wizard $\checkmark \times$ | | | | 2 | R | |
| Headline | \times All features of the "Document Archive" app can be us $$ $$ Disable N $$ $$ $$ | | | | | | |
| Good afterno | \checkmark | ler > Sales no > Repoi | rts | | | | |
| | All Done You can now start attachino files to vour documents and entities in Business Central! | > Histo | ry | | | | |
| | Le You have completed the setup for Document Archivel Do you want to set up permissions for user groups as well? | | | | | | |
| Activities ~ | Fit | | | | | | |
| For Release | Cr Yes No th | urns | | | | | |
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| Pending User Failed Ema | ils in Draft Emails in Sent Emails Last Requests Sent Requests | to | | | | | |

Document Archive is now configured and can be used.

More details about the setup can be found in the chapter Error! Reference source not found..



Usage

Document Archive Files Factbox

The *Document Archive Files* factbox can be found on the page views of your master data and documents. A complete list of where the factbox is available can be found in the Document Archive Pages section of this manual.

| Dynamics 3 | 365 Business Central | | | | Sandbox Q D 💿 ? 🕻 |
|------------|----------------------------|------------------------|------------------------------|-----------------|-------------------------------|
| ÷ | Item Card 1000 · Bicycl | le | + | Î | √ Saved 🗖 🖈 🤘 |
| | Process Item Pri | ices & Discounts Reque | est Approval Actions Related | d Fewer options | 0 |
| | ltem | | | Show less | ① Details 🛛 Attachments (0) |
| | No 1 | 000 🗄 … | Service Item Gr | ~ | Document Archive Files \vee |
| | Description · · · · · B | icycle | Automatic Ext. T · | | Category File Name |
| | Blocked · · · · · · · | | Common Item | | |
| | Type · · · · · · II | nventory 🗸 | Purchasing Code | \sim | |
| | Base Unit of Me • P | cs ~ | Deposit | | |
| | Last Date Modif 1 | 2/29/2020 | Deposit Item · · · · · | | |
| | GTIN | | Item No. | | . Urop your files here |
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How to store an attachment

- 1. Open the page of a preferred entity. In this example: Item 1000 Bicycle
- 2. Use one of the following options to attach a document to the entity
 - I. Drag and drop a file from a local or cloud folder to the Drop you files area

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|------------|--|---|
| ¢ | Item Card / + | |
| | Process Item Prices & Discounts Request Approval Actions Related F | ewer options |
| | | C Details ⓐ Attachments (0) ↓ ⑦ Document Archive Files ∨ |
| i > Docume | nt Archive v ひ ク Zoeken in Do | cum Category File Name |
| it it | em 1000 User Manual 11-1- | Unter to mobiling to show in this veries |
| | | Picture ~ |



II. Drag and drop a e-mail from Microsoft Outlook



III. Open the File Explorer, locate and select the document and click on *Open*

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|---------------------|-----------------------------------|------------------------|-------------------|-----------|---|----------------|---|---|
| <i>←</i> | Item Card | | | | 6 | ~ ^K | | I |
| | 1000 · Bicycle | | | | | | | |
| | Process Item Prices & Discounts | Request Approval Actio | ons Related Fewe | r options | | Ō | | |
| | 14 | | | | Details Attachments (0) | _ | | |
| Dere | and A Rurasublad A Document Archi | | Zaskan in Daguman | t Archive | Document Archive Files \vee | | | |
| Nieuwe | map | ve v o x | | | Category File Name | н. | | l |
| xveld | Naam | Gewijzigd op | Туре | Grootte | (There is nothing to show in this view) | н. | | |
|)19-1 | Item 1000 User Manual | 11-1-2021 15:52 | Tekstdocument | | | ы. | | 1 |
| General | | | | r i | | ы. | | |
| inxveld | | | | | .↓. Drop your files here | | | l |
| ions B.V | | | | | | | | l |
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| bestune | | | Openen Ann | uleren | | | | |
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- 3. The document is now attached to the entity with the following data
 - I. Category The category of the document Now setup with *Default* due to the configuration in the Document Archive Setup (Wizard)
 - File name The file name and extension of the document
 - III. Created Date/Time Date/time when the document was stored
 - Only for drag-and-drop of an e-mail from Microsoft Outlook:
 - IV. Message From Sender Name of the e-mail

Π.

V. Message Date/Time Sender Date/Time of the e-mail



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| 1000 · Bicy | rcle | | | |
| Process Item | Prices & Discounts Reque | est Approval Actions Related | Fewer options | 0 |
| ltem | | | Show less | Details Attachments (0) |
| No | 1000 | Service Item Gr | | Document Archive Files 🗸 |
| Description · · · · · | Bicycle | Automatic Ext. T · | | Category Eile Name |
| Blocked · · · · · · · | | Common Item | | DEFAULT Item 1000 User Manual.txt |
| Туре | Inventory | Purchasing Code | | |
| Base Unit of Me | PCS | Deposit | | |
| Last Date Modif | 12/29/2020 | Deposit Item · · · · · | | |
| GTIN ····· | | Item No. | | |
| Item Category C · | | Qty. per Unit of | 0 | |
| Inventory | | | Show less | Picture V |
| | | | 211011 1222 | |
| Shelf No. | F4 | Qty. on Job Order | 0 | |
| | | | | |

How to delete a Document Archive File

- 1. Click on Show more options (three dots) of the file to delete
- 2. Click on Delete Line

| Dynamics 3 | 365 Business Central | | Sandbox Q D 🕲 ? Ċ |
|------------|--|--|-------------------------------------|
| ÷ | _{Item Card} 1000 · Bicycle | (2) + II | √ Saved 🗖 🧏 |
| | Process Item Prices & Discounts | Request Approval Actions Related Fewer options | 0 |
| | ltem | Show less | ① Details 🛛 🕅 Attachments (0) |
| | No | ···· Service Item Gr · | Document Archive Files \vee |
| | Description · · · · · Bicycle | Automatic Ext. T · | Category File Name |
| | Blocked · · · · · · · | Common Item | DEFAULT : Item 1000 User Manual.txt |
| | Type · · · · · · Inventory | ♥ Purchasing Code · · · · · · | Manage |
| | Base Unit of Me PCS | ✓ Deposit | Edit Category |
| | Last Date Modif 12/29/2020 | Deposit Item · · · · · • | Belete Line |
| | GTIN ····· | Item No | Select More ur files here |
| | Item Category C | V Qty. per Unit of 0 | |
| | | | Disturc |
| | Inventory | Show less | Picture V |
| | Shelf No. · · · · · · F4 | Qty. on Job Order 0 | |
| | Created From C · | Qty. on Assembl 0 | |

After deleting the *Document Archive File* the file in the storage will also be deleted

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Document Archive Categories

Categories can be used to organize your attachments. The document archive categories can be set up in the *Document Archive Categories* page.

Setup Document Archive Categories

1. Find and open Document Archive Categories in Tell Me

| mics 365 Business Central | | | | Sandbox | Q | Q | Ø | ? | 9 |
|--|-------------------|---|----------------|---------|---|---|---|----------|---|
| Tell me what you want to do | | | | | | | R | \times | |
| document archive ca | | | | | | | | | I |
| Go to Pages and Tasks | | | | | | | | | I |
| > Document Archive Categories | | | Administration | | | | | | 1 |
| Didn't find what you were looking for? Try exploring | | | | | | | | | ł |
| | | | | | | | | | I |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Shelf No. · · · · · · · · F4 | Qtv. on Job Order | 0 | | | - | - | | | ł |
| Created From Ca · · | Qty. on Assembl | 0 | / | | | | | | |

- 2. Create new categories or edit/delete existing categories in this page. Each category has the following mandatory fields
 - a. Code
 - The code of the Category
 - b. Description The description of the *Category*

| Dynamics 3 | 865 Business Cen | itral | Sandbox | a í | © ۵ | ? C |
|------------|------------------|---|---------|-----|------------------|-----|
| ¢ | Item Ca 🔶 | Document Archive Categories Saved | Д с, | 7 | 3 7 ^K | |
| | 1000 | 🔎 Search 🕂 New 😥 Edit List 💼 Delete 😨 Permission Groups 🕼 Open in Excel | 7 : | = | | |
| | Process | Code † Description | | | (i) | |
| | Item | → DEFAULT E Default file category | | | | |
| | No | | | | | |
| | Descript | | | | | |
| | Blocked | | | | | |
| | Туре | | | | | |
| | Base Un | | | | | |
| | Last Dat | | | | а, | |
| | GTIN ··· | | | | | |
| | Item Car | | | | | |
| | | | | | | |
| | Invent | | | | | |
| | Shelf No | | | | | |
| | Created | | | | | |



Initial Document Archive Category

The initial category of an attachment is determined by the setup in the *Document Archive Setup*. The available options are found in the Categories section and provides the following options based on the Category Selection Method.

| Category Selection | on Method | Initial Category | Note |
|---------------------------|--|--|---|
| Use selected cate | egory | Based on the selected category when attaching the document | Only available for FactBox Type = Categories |
| Select on file up | oad | Select preferred category after attaching the document | |
| Use default | | The Default Category of the Document Archive Setup | Default Category is mandatory to set up in the Document Archive Setup |
| Dynamics 365 Business Cer | ntral | Sa | ndbox Q D 🚳 ? 🕻 |
| € € € | Document Archi Popen Setup Wizard Categories General Enabled Categories Category Selection M Use default Files File Handler | Saved [Saved [Ve Setup Permission Groups File Handler Settings FactBox Type ····· Files Perfault Category ···· DEFAULT Default Category ···· DEFAULT | |

Change Document Archive Category

To change category of an attachment:

1. Click on *Show more options* (three dots) of the file to change.

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2. Click on *Edit Category*.

| Dynamics 3 | 65 Business Central | l | | | Sandbox Q D 🚳 ? 🖸 |
|------------|---------------------|------------------------------|--------------------------|---------------|-----------------------------------|
| ÷ | Item Card | | | Û | c ,* |
| | 1000 · Bicy | cle | | | |
| | Process Item | Prices & Discounts Request A | Approval Actions Related | Fewer options | ٥ |
| | Item | | | Show less | ① Details 🛛 Attachments (0) |
| | No | 1000 | Service Item Gr | - 1 | Document Archive Files \vee |
| | Description | Bicycle | Automatic Ext. T · | | Category File Name |
| | Blocked · · · · · · | | Common Item | | DEFAULT Item 1000 User Manual.txt |
| | Туре | Inventory | Purchasing Code | | Manage |
| | Base Unit of Me | PCS | Deposit | | Edit Category |
| | Last Date Modif | 12/29/2020 | Deposit Item · · · · · | | Ex Delete Line |
| | GTIN ····· | | Item No. | | Select More |
| | Item Category C | | Qty. per Unit of | 0 | |
| | | | | | Picture ~ |
| | Inventory | | | Show less | |
| | Shelf No. | F4 | Qty. on Job Order | 0 | |
| | Created From C | • | Qty. on Assembl | 0 | |

3. Selected the preferred *Category* and click on OK.

| Dynamics 3 | 65 Business Central | | | | | | | | | Sandbox | Q | Q | Ø | ? | С |
|------------|-----------------------|--------------------|-------------|---------------|----------|-----------|---------------|-----------|----------|----------------|---------|-----------|-----|---|---|
| ÷ | Item Card | | | | Ø | + | Û | | | | | | , K | | |
| | 1000 · Bicy | cle | | | | | | | | | | | | | |
| | Process Item | Prices & Discounts | Request App | roval | Actions | Related | Fewer options | | | | | | (i) | | |
| | Item | | | | | | Show less | (i) Detai | ls 🛈 | Attachment | ts (0) | | _ | | |
| | No | 1000 | s | ervice Item 0 | Gr · | | | Docume | ent Arc | hive Files \ | / | | . I | | |
| | Description | Bicycle | A | utomatic Ext | t. T · 🔘 | \supset | | Category | | File Name | | | 11 | | |
| | Blocked · · · · · · · | | C | ommon Iten | n · | | | DEFAULT | | Item 1000 | User Ma | inual.txt | 11 | | |
| | Туре | Inventory | P | urchasing Co | ode · · | | | Manage | | | | | 11 | | > |
| | Base Unit of Me | PCS | D | eposit | | | | 🔎 Edit C | Category | | | | | | |
| | Last Date Modif | 12/29/2020 | D | eposit Item | | \supset | | 🔆 Delet | te Line | | | | | | |
| | GTIN ····· | | It | em No. · · · | | | | 🐖 Selec | t More | _ur files here | | | | | |
| | Item Category C | | C | ty. per Unit | of · | | 0 | | 1 | | | | | | |
| | Inventory | | | | | | Show less | Picture | ~ | | | | | | |
| | Shelf No. • • • • • • | F4 | c | ty. on Job O | Order · | | 0 | | | | | | | | |
| | Created From C | | C | ty. on Assen, | nbl · | | 0 | | 1 | | \sum | | | | |

4. The category is now changed.

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| mics 365 Business Central | | Sandbox Q D 🐵 ? 🖸 |
|--------------------------------------|--|------------------------------------|
| ← Item Card | | CT ,* |
| 1000 · Bicycle | | |
| Process Item Prices & Discounts Requ | est Approval Actions Related Fewer options | Ū |
| ltem | Show less | ① Details Attachments (0) |
| No 1000 | Service Item Gr | Document Archive Files \vee |
| Description · · · · · Bicycle | Automatic Ext. T · | Category File Name |
| Blocked · · · · · · · | Common Item | TRUSTED : tem 1000 User Manual.txt |
| Type ····· Inventory | Purchasing Code | |
| Base Unit of Me PCS | Deposit | |
| Last Date Modif 12/29/2020 | Deposit Item · · · · · · | |
| GTIN ····· | Item No. | Drop your files here |
| Item Category C | Qty. per Unit of 0 | |
| Inventory | Show less | Picture ~ |
| Shelf No. · · · · · · · F4 | Qty. on Job Order · 0 | |
| Created From C · | Qty. on Assembl 0 | |

Notes

- The visibility of the available categories is based on the setup of the permissions of the category
- The visibility and accessibility of the file can change after assigning a new category due the permission of the category

Document Archive Permission Groups

With the *Document Archive Permission Groups* you can set up the permissions per *User Group* for each *Document Archive Category*.

1. Find and open *Document Archive Permission Groups* in *Tell Me*.

| document archive permission | on group | | | | | |
|------------------------------|--------------------------|--|----------------|--|--|--|
| Go to Pages and Tasks | | | | | | |
| > Document Archive Perm | nission Groups | | Administration | | | |
| Didn't find what you were lo | oking for? Try exploring | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |



- 2. In the Document Archive Permissions Groups page you can see the existing permissions by Document Category and User Group.
 - a. Top section (blue)

b. Bottom section (green)

Configured Category / User Group combinations Permissions for the selected Category / User Group Combination

| Docun | nent Archive Permis | ssion Groups | | | | | | • 56%c | 9 | ~ _ | - |
|---------------|--------------------------------------|--------------|------|-------|---------------|------------------------|--------------------------|------------------|-----|-----|----|
| و مر | Search + New | 🐯 Edit List | 💼 De | elete | ቆ User Groups | 🗸 Grant All Permission | ns 🗙 Revoke All Permissi | ons 📲 Open in Ex | cel | 7 = | (j |
| | Catagory Code | | | | Licor Group | | Liter Group Name | | | | |
| | DEEALUT | | | | User Group | | user Group Name | | | | -1 |
| \rightarrow | DEFAULT | | Ē | : | D365 SALES | | Post sales doc. | | | | -1 |
| | TRUSTED | | 2 | | DIGI DALLI | | | | | | |
| | | | | | | | | | | | - |
| | | | | | | | | | | | 1 |
| Permi | issions | | | | | | | | | | |
| Permi | issions | | | | | | | | | | |
| Permi | issions Type † | | | | | | Permission | | | | |
| Permi | issions Type† → <u>Read</u> | | | | | | Permission Yes | | | | |
| Perm | issions Type↑ → Read Insert | | | | | | Permission Yes Yes | | | | |

Top set up a new Document Archive Permission Group

3. Create a new entry by clicking on *New* in the ribbon.

| Docum | ent Archiv | Permission Groups | | | | | | | | V 50 | | | | |
|-------|-------------|---|------|-------|--------------|--------------|--|--------------------------|-------|-----------|-------|---|---|-----|
| , Р s | earch + | New 👿 Edit List | 🗎 De | elete | ቆ User Group | Grant All Pe | rmissions | 🗙 Revoke All Permis | sions | 🚺 Open in | Excel | Y | = | (i) |
| | Catagon | Code | | | User Group | | llear | Group Name | | | | | | ^ |
| | DEFALI | r | | | user croup | | ose: | Group Hame | | | | | | |
| -> | DEFAUL | r | E | : | D365 SALE | | Post | sales doc. | | | | | | |
| | TRUSTE |)) | | | DJUJ JALL | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Dermi | ssions | | | | | | | | | | | | | |
| Permi | ssions | | | | | | | | | | | | | |
| Permi | ssions | Type 1 | | | | | | Permission | | | | | | |
| Permi | ssions → | Type 1 Read | | | | | | Permission Yes | | | | | | |
| Permi | ssions → | Type 1 Read nsert | | | | | · · · · · · · · · · · · · · · · · · · | Permission Yes Yes | | | | | | |
| Permi | ssions → | Type † <u>Read</u> nsert Vlodify | | | | | ······································ | Permission Yes Yes | | | | | | |



4. Fill in the Category code and the User Group combination for which you want to set up the permissions.

| 55 Business Central | | | | Sandbox | a 🗘 | Ô |
|------------------------------------|------------------------------|-----------------------|--------------------------|---------------|-----|-----|
| Document Archive Permission Groups | | | | | | c', |
| , O Search + New ■ Edit List | 🗐 Delete 🛛 🛔 User Groups 🗸 🤇 | Grant All Permissions | X Revoke All Permissions | 🚺 Open in Exc | e 7 | ■ 0 |
| Category Code | User Group | Use | r Group Name | | | |
| DEFAULT | | | | | | |
| \rightarrow | | POS | t sales doc | | | |
| Code † | Description | 105 | | | | |
| → <u>DEFAULT</u> | Default file category | | | | | |
| TRUSTED | Trusted files | | | | | |
| | | | | | | |
| + New | Select | from full list | | | | |
| Permissions | | | | | | _ |
| | | | | | | |
| Type † | | | Permission | | | |
| Read | | | Yes | | | |
| Insert | | | Yes | | | |
| Modify | | | Yes | | | |
| Delete | | | Yes | | | |
| → Execute | | : | Yes | | | |

5. Assign the preferred permission in the subpage.

| Dynamics 3 | 65 Busi | ness Central | | | | | | | | | | Sandbox | Q | Q | | Ô | ? | С |
|------------|---------------|-------------------|--------------|----------|-------|----|-------------|------------|-------------------|--------|--------------------------|-------------|------|----------|---|----------------|---|---|
| ÷ | Docum | ent Archive Permi | ssion Groups | | | | | | | | | √ Sav | ed | Д | ď | 7 ^K | | |
| | ,⊂ s | earch + New | 🐺 Edit List | 💼 De | elete | 28 | User Groups | ~ 0 | rant All Permissi | ons | 🗙 Revoke All Permissions | 🚺 Open in E | xcel | ∇ | = | i | | |
| | | Category Code | | | | | User Group | | | User (| Group Name | | | | | - | | |
| | | DEFAULT | | | | | | | | | | | | | | | | |
| | \rightarrow | DEFAULT | | <u>Å</u> | : | | D365 TEAM M | EMBER | | Team | Member | | | | | | | |
| | | DEFAULT | | | | | D365 SALES | | | Post s | sales doc. | | | | | | | |
| | | TRUSTED | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| | Dennel | | | | | | | | | | | | | | | | | |
| | Permi | ssions | | | | | | | | | | | | | | | | |
| | | | | | | | | | | C | | | | | | ٦. | | |
| | | Type 1 | | | | | | | | | Permission | | | | | | | |
| | | → <u>Read</u> | | | | | | | | | | | | | ~ | | | |
| | | Insert | | | | | | | : | | Vec | | | | | | | |
| | | Modity | | | | | | | | - 1 | | | | | | | | |
| | | Delete | | | | | | | | _ | | | | | | | | |
| | | Execute | | | | | | | | L | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |

You can grant all permissions for a *Document Archive Permission Group* with the action Grant All Permissions.



| Docum | nent | Archive Permis | sion Groups | | | | | | | √ Sav | ed | 0 0 | в. |
|---------------|-------|--|-------------|-------|------|---------------|-------------------|--|----------------|-----------|------|-----|----|
| | | | | | | 6 | | | | | | | |
| ,∕⊃ s | Searc | ch 🕂 New | 🔯 Edit List | 🔋 Del | lete | 🚨 User Groups | 🗸 Grant All Permi | sions X Revoke A | II Permissions | Open in B | xcel | 8 | = |
| | | | | | | | | | | | | | |
| | | Category Code | | | | User Group | | User Group Name | | | | | |
| | E | DEFAULT | | | | | | | | | | | |
| | 1 | TRUSTED | | | | | | | | | | | |
| \rightarrow | 0 | DEFAULT | | ŧ | 11 | D365 SALES | | Post sales doc. | | | | | |
| | E | DEFAULT | | | | D365 TEAM MI | EMBER | Team Member | | | | | |
| | | | | | | | | | | | | | |
| Permi | issic | ons | | | | | | | | | | | |
| Permi | issic | ons | | | | | | | | | | | |
| Permi | issic | ons Type † | | | | | | Permission | | | | | |
| Permi | issic | ons Type 1 Read | | | | | | Permission | | | | | |
| Permi | issic | ons Type 1 Read Insert | | | | | | Permission Yes Yes | | | | | |
| Permi | issic | Type 1 Read Insert Modify | | | | | | Permission Yes Yes Yes | | | | | |
| Permi | issic | Type 1 Read Insert Modify Delete | | | | | | Permission Yes Yes Yes Yes | | | | | |

You can revoke all permissions for a *Document Archive Permission Group* with the action Revoke All Permissions.

| Docum | ent Archive Permi | ssion Groups | | | | | | | V 58 | /ed | ы ч | |
|---------------|--|--------------|--------|-----|-------------------|----------------------|-------------------|----------|-----------|-------|-----|---|
| ,∕⊃ s | earch + New | 🐺 Edit List | Delete | e 🏼 | 🕯 User Groups 🛛 🗸 | Grant All Permission | × Revoke All Perr | nissions | 🚺 Open in | Excel | 7 = | 0 |
| | | | | | | | | | 1 | | | 1 |
| | Category Code | | | | User Group | Us | er Group Name | | | | | |
| | DEFAULT | | | | | | | | | | | |
| | TRUSTED | | _ | | | | | | | | | |
| \rightarrow | DEFAULT | | ŧ | 100 | D365 SALES | Pos | st sales doc. | | | | | |
| | DEFAULT | | | | D365 TEAM MEMBER | R Tea | m Member | | | | | |
| | | | | | | | | | | | | |
| Permi | ssions | | | | | | | | | | | |
| Permi | ssions Type † | | | | | | Permission | | | | | |
| Permi | ssions Type f Read | | | | | | Permission | | | | | |
| Permi | ssions Type 1 Read Insert | | | | | | Permission | | | | | |
| Permi | ssions Type 1 Read Insert Modify | | | | | | Permission | | | | | |
| Permi | Type 1 Read Insert Modify Delete | | | | | | Permission | | | | | |

Note: The permissions of a *Document Archive Permissions Group* with no *User Group* assigned, will be applicable for all users. You are warned with a message when you set up this configuration.

| Dynamics 3 | 365 Business Central | | Sandbox | a 🗘 | Ô | ? | С |
|------------|------------------------------------|---|---------------|---------|----------|---|---|
| ÷ | Document Archive Permission Groups | | Not saved | ı 🗋 ا | ⊐',× | | |
| | 🔎 Search 🕂 New 🐺 Edit List | 🔋 Delete 🔹 User Groups 🗸 Grant All Permissions 🗙 Revoke All Permissions | 🕼 Open in Exc | iel 🍸 i | ≡ (i) | | |
| | Category Code | User Group User Group Name | | | ^ | | |
| | → DEFAULT | W | | | | | |
| | DEFAULT | BBSS SALES Pest sales doc. | | | | | |
| | DEFAULT | D365 TEAM MEMBER Team Member | | | | | |
| L | Permissions | Yes No | | | | | |
| | Type 1 | Permission | | | | | |
| | | (There is nothing to show in this view) | | | | | |
| | | | | | Ţ | | |



Miscellaneous

Document Archive with Posted Documents

The *Document Archive Files* will be automatically transferred from a document to the posted document during posting.

The picture below shows an example of a *Document Archive File* being transferred when a *Sales Invoice* is posted.

| cs 365 Business Central | Sandbox Q D 💿 ? 🧿 Dy | namics 365 Business Central | Sandbex Q 🗘 🚳 |
|--|------------------------------|---|---|
| 🗧 Sales Involce 🥥 + 📾 | √Saved ⊏ ,× ⁴ | C Rosted Sales Invoice | √Seved 🖬 💉 |
| 1004 · The Cannon Group PLC | | 103032 · The Cannon Group PLC | |
| Posting Prepare Invoice Release Request Approval Navigate More options | ٥ | Process Invoice Correct Print/Send Navigate Actions Related Fewer options | ٥ |
| General Show more | Details Attachments (0) | General Stowiess | Details Details Attachments (0) |
| Customer Name · The Cannon Group PI ··· Due Date ····· 2/27/2022 | Document Archive Files 🗸 | No | Document Archive Files \sim |
| Contact · · · · · · · · · · · · · · · · · · · | Course Division | Customer · · · · · · The Cannon Group PLC Order No. · · · · · · | |
| Posting Date · · · · · 1/27/2022 | DEFAULT Timesheet Detail.txt | Sell-to Pre-Assigned No 1004 | DEFAULT Timesheet Detail.bt |
| | | Address · · · · · · 192 Market Square External Docum · | |
| Lines Manage More aptions | | Address 2 · · · · · Salesperson Code · PS | |
| | | City ····· Birmingham Responsibility C · BIRMINGHAM | |
| Type No. Description v Location Code Quan | . J. Drop your files here | County · · · · · · O | , J Drop your files here |
| -> G/L Account : 6710 Consulting Res - Dom. BLUE | | Post Code · · · · · · B27 4KT Cancelled · · · · · No | |
| | | Country/Region ··· G8 Corrective ····· No | |
| | Customer Statistics | Contact No CT000008 Closed | Incoming Document Files >> |
| < | Customer No. 10000 | Phone No Doc. Mail Queue | Nama Type |
| Subtotal Excl. V 150.00 Total Excl. VAT (150.00 | Balance (LCY) 168,364.41 | Mobile Phone N., - No of Doc. Mail 0/1 | |
| | 10.4 | 0.30.198/8C/7tenant=default&signInRedirected=18.runi | (There is nothing to show in this view) |

Document Archive Role Center Entries

The pages for *Document Archive* can be found in the *Apportunix* role center.

| Dynami | cs 365 Business Central | | Sandbox Q D 🐵 ? 😋 |
|--------|--|--|---|
| | CRONUS International Ltd. Find | | Expand Collapse ··· |
| ~ | Apportunix > Explore Setup (1) Subscriptions (2) Document Archive (4) - Document Archive Setup - Document Archive Setup Wizard | Company Hub > Explore Home (2) Setup (3) | Administration > Explore General (8) Data (6) Users (8) Workflow (11) Services (18) |
| l | Document Archive Categories Document Archivermission Groups Document Mail Queue (3) Price & Item Management (4) | Human Resources > Explore Employees (3) | RapidStart (8) |
| | ^ | Setup (11) ~ ^ | Manufacturing > Explore Product Design (6) |
| | Finance > Explore General Ledger (11) Cash Management (9) | Purchasing > Explore Purchasing (15) | Capacities (6) Planning (8) Operations (9) Costing (6) |
| | Cost Accounting (9) Receivables (13) Payables (9) Fixed Assets (9) | Planning (16) Inventory & Costing (8) Setup (17) | Setup (11) |



Document Archive Pages

Document Archive is available on the following pages:

| Page | | |
|------------------------------|-------------------------------|----------------------------|
| Customer Card | Sales Order Archive | Blanket Purchase Orders |
| Customer List | Sales Quote Archive | Purchase Return Order List |
| Vendor Card | Purchase Quote Archive | Service Quotes |
| Vendor List | Purchase Order Archive | Service Orders |
| Item Card | Warehouse Receipt | Service Invoices |
| Sales Quote | Service Order | Service Credit Memos |
| Sales Order | Service Invoice | Service Contracts |
| Sales Invoice | Service Credit Memo | Service Contract Quotes |
| Sales Credit Memo | Service Quote | Purchase Quote Archives |
| Purchase Quote | Posted Service Credit Memos | Purchase Order Archives |
| Purchase Order | Posted Service Credit Memo | Sales Quote Archives |
| Purchase Invoice | Posted Service Shipments | Sales Order Archives |
| Purchase Credit Memo | Posted Service Shipment | Planned Production Order |
| Resource Card | Posted Service Invoices | Firm Planned Prod. Order |
| Job Card | Posted Service Invoice | Released Production Order |
| Job List | Service Item Card | Simulated Production Order |
| Posted Sales Shipment | Service Item List | Assembly Orders |
| Posted Sales Invoice | Service Contract | Item List |
| Posted Sales Credit Memo | Service Contract Quote | Sales Invoice List |
| Posted Purchase Receipt | Sales Return Order Archive | Sales Credit Memos |
| Posted Purchase Invoice | Sales Return Order | Sales Quotes |
| Posted Purchase Credit Memo | Purchase Return Order | Production Order List |
| Posted Sales Shipments | Purchase Return Order Archive | Resource List |
| Posted Sales Invoices | Posted Return Shipment | |
| Posted Sales Credit Memos | Posted Return Shipments | |
| Posted Purchase Receipts | Posted Return Receipt | |
| Posted Purchase Invoices | Posted Return Receipts | |
| Posted Purchase Credit Memos | Posted Whse. Receipt | |
| Blanket Sales Order | Warehouse Shipment | |
| Blanket Purchase Order | Posted Whse. Shipment | |
| Assembly Order | Posted Whse. Shipment List | |
| Contact Card | Blanket Sales Orders | |
| Contact List | Sales Return Order List | |
| Opportunity List | Sales Order List | |
| Opportunity Card | Purchase Quotes | |