

Configurable business document

Patterns and Antipatterns

Dynamics 365 FastTrack Architecture
Insights Series

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Agenda

- Configurable business document (CBD) overview
- Scenario 1 : Named output destinations
- Scenario 2 : Output destinations based on print actions
- Scenario 3 : Document routing as service and CBD
- QA

Configurable business documents

Quick overview

Published techtalks

[Finance and Supply Chain Management: Configurable Business Documents - Microsoft Dynamics Blog](#)

Documentation and release notes:

<http://aka.ms/businessdocumentmanagement>

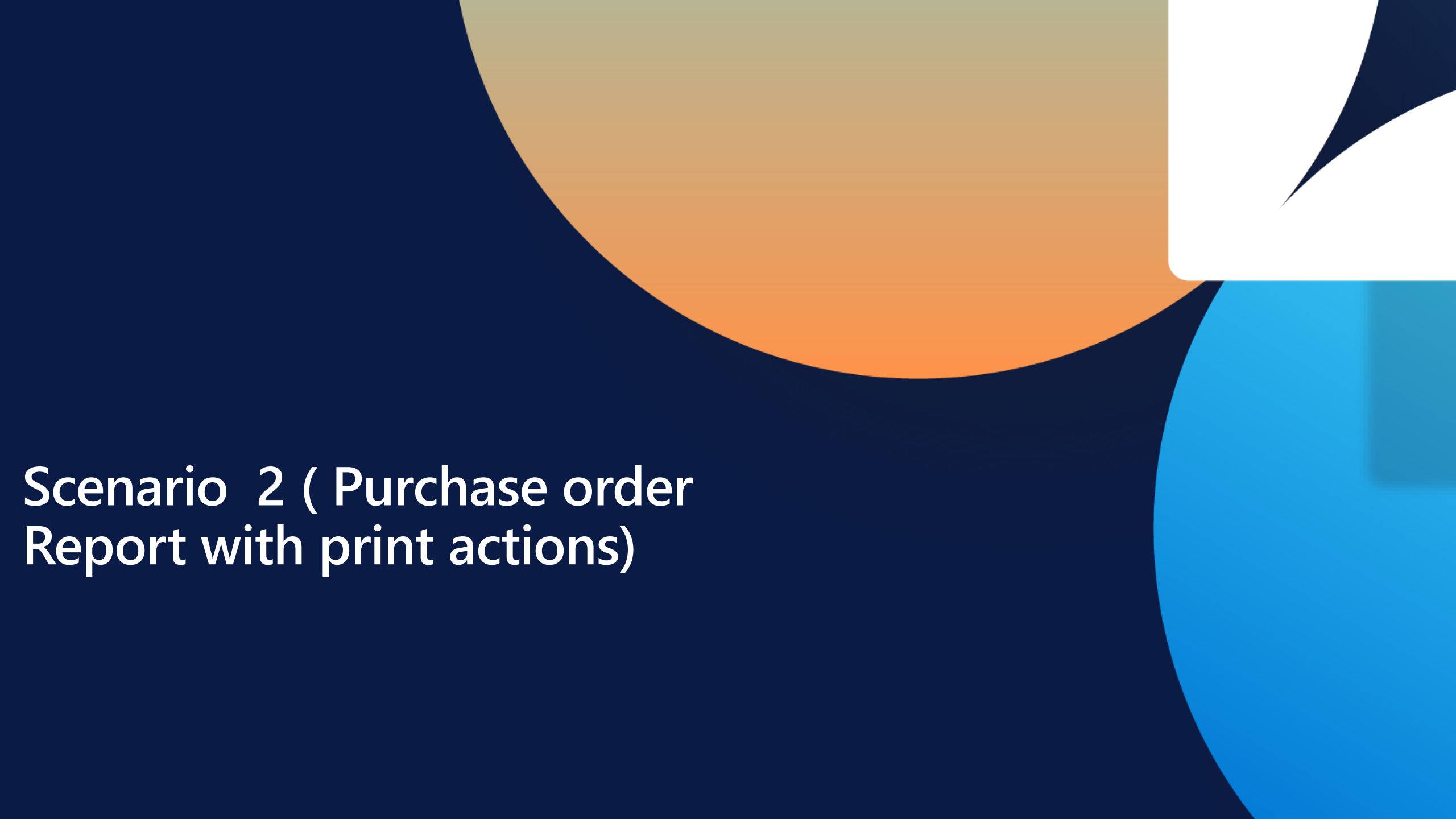
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- Low code no code way for designing business document
 - [Dynamics 365: FastTrack Finance and Operations: Electronic Reporting | Microsoft Learn](#)
 - Format changes are easy and quick in tools like excel and word
 - Changing layout
 - Print management
 - Adding / removing fields
 - Start with available assets as part of Microsoft repository, for a fresh custom document SSRS could be less effort intensive
 - [Business document management overview - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

Points to consider

- Testing is essential . Test for pagination , test for headers and footer , test for large documents with many lines , test for large texts in memo fields on header and line
- You may hit excel or word limitations or convert to PDF limitations
- Not all print management feature are supported



Scenario 1 (Purchase order Report default destination and named destinations)



Scenario 2 (Purchase order Report with print actions)



Scenario 3 (EMF printing and DRA as Service)

Q & A

Thank you