



DOCSOLUTIONS FOR DYNAMICS CE

UNIFIED DOCUMENT EXPERIENCE,
IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

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DocSolutions for Dynamics CE

App for Microsoft Dynamics 365 Business Central

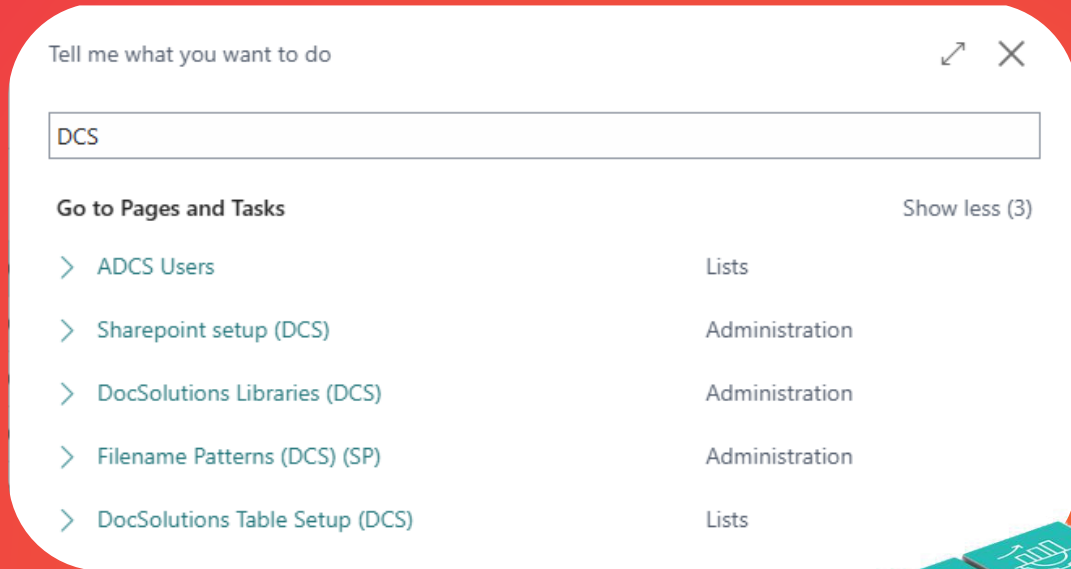
DO YOU WANT A SINGLE, STREAMLINED DOCUMENT MANAGEMENT SYSTEM THAT REMAINS FULLY CONSISTENT BETWEEN BUSINESS CENTRAL AND SHAREPOINT, WITHOUT ADDED COMPLEXITY?

ARE YOU LOOKING FOR A READY-TO-USE SOLUTION THAT KEEPS YOUR SYSTEMS ALIGNED, WITH NO HIDDEN COSTS OR COMPLEX INTEGRATIONS TO MANAGE?

The **DocSolutions for Dynamics CE** application by EOS Solutions enables both **CE users and Business Central users to view, upload, and download the same documents, within the same folder structure**, directly in Microsoft Dynamics 365 Business Central, **without the need for additional middleware.**



Here is a list of the features involved



ALT + Q and DCS



New

"CE" Storage Type in Business Central



Cross-system alignment:

once the folder for the CE record is created, the synchronization exposes the folder path in BC



Consistent experience across CE and BC:

document upload, download, and opening directly from the entity card

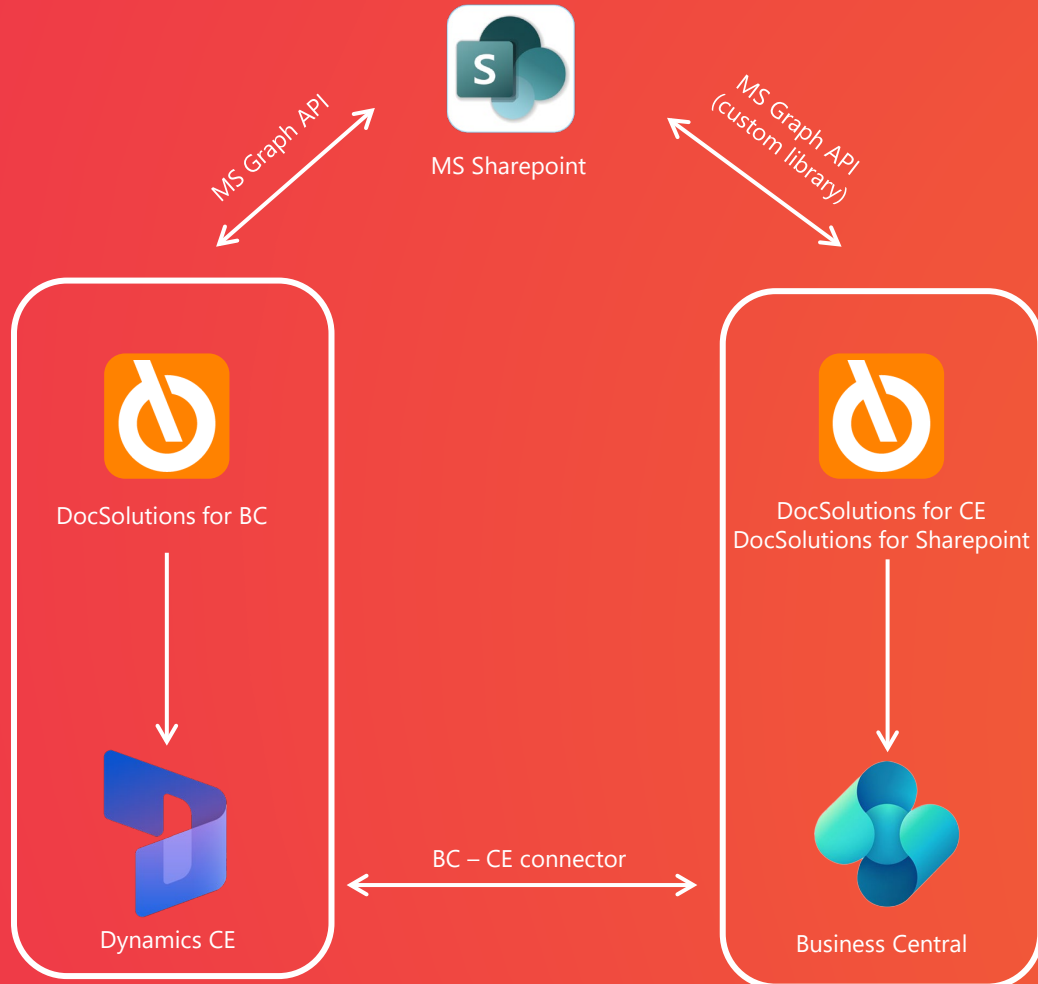


No additional middleware/APIs required

the application operates downstream of the synchronization between the systems



ARCHITECTURE AND USE CASES



CE: DocSolutions for Dynamics CE integrates with native SharePoint functionalities, adding application-level configuration and folder patterns. When a new account is created, the solution generates the SharePoint folder according to the defined Folder Pattern (e.g. {name}-{guid}-DCS).

Synchronization: the BC↔Dataverse connector synchronizes the "CE Folder Path" field (the SharePoint folder path of the entity) onto the corresponding record in BC.

BC: DocSolutions for BC leverages the DocSolutions for SharePoint settings and the new "CE" Storage type to point precisely to the same folder. The BC user accesses the documents from the FactBox and can work with them as usual.



SETUP IN BUSINESS CENTRAL



CUSTOMER

Elenco mapping campo integrazione

Stato	Nr. campo	Nome campo	Nr. campo tabella integrazione	Nome campo integrazione	Direzione	Direzione trasformazi...	Con...	Convalida campo tabella di integrazione	Can... il valo... per	Non Null
→ Abilitato	2	Nome	19	Account Name	Bidirezionale	A tabella in...				
Abilitato	8	Contatto	64	Address 1: Primary Contact Na...	Bidirezionale	A tabella in...				
Abilitato	5	Indirizzo	65	Address 1: Street 1	Bidirezionale	A tabella in...				
Abilitato	6	Indirizzo 2	66	Address 1: Street 2	Bidirezionale	A tabella in...				
Abilitato	91	CAP	73	Address 1: ZIP/Postal Code	Bidirezionale	A tabella in...				
Abilitato	7	Città	68	Address 1: City	Bidirezionale	A tabella in...				
Abilitato	35	Cod. paese	71	Address 1: Country/Region	Bidirezionale	A tabella in...				
Abilitato	92	Provincia	69	Address 1: State/Province	Bidirezionale	A tabella in...				
Abilitato	22	Cod. valuta	125	Currency	Bidirezionale	A tabella in...				
Abilitato	102	E-mail	32	Email	Bidirezionale	A tabella in...				
Abilitato	84	Nr. fax	40	Fax	Bidirezionale	A tabella in...				
Abilitato	103	Home page	30	Website	Bidirezionale	A tabella in...				
Abilitato	9	Nr. di telefono	37	Main Phone	Bidirezionale	A tabella in...				
Abilitato	30	Cod. metodo di spedizione	204	Indirizzo 1: termini di spedizione	Bidirezionale	A tabella in...				
Abilitato	31	Cod. spedizioniere	205	Indirizzo 1: metodo di spedi...	Bidirezionale	A tabella in...				
Abilitato	27	Cod. condizioni pagam.	203	Condizioni pagamento	Bidirezionale	A tabella in...				
Abilitato	20	Limite credito (VL)	45	Credit Limit	ATabellain...	A tabella in...				
Abilitato	5049	Nr. contatto primario	17	Primary Contact	Bidirezionale	A tabella in...				
Abilitato	18091580	Percorso cartella CE SP	18091580	Percorso DCS	DaTabellain...	Da tabella L...				
Disabil...	1	Nr.	20	Account Number	ATabellain...	A tabella in...				
Disabil...	5061	Nr. cellulare	39	Other Phone	Bidirezionale	A tabella in...				

DocSolutions Library

CE-CUST

Test Write | Permissions | Execution Log | More options

General

Code: CE-CUST | Enable Debug:

Enabled: | File size limit (MB): 0,00

Storage

Storage Type: CE

EOS CE

Sharepoint Site: DocSolutions4CE-BC

Document Library Name: Account

Folder Pattern Code: FODLDERCE

Filename Pattern Code: FILECE

- **Verify the Dataverse integration**
- **DocSolutions – SharePoint Setup:** from the DocSolutions SharePoint Setup page, configure the Tenant ID, Client ID, and Client Secret (the same values used in CE).
- **Definition of a “CE” Type Library**
- **Table Association:** in the Table (e.g., Customers), associate the newly created “CE” DocSolutions Library.
- **Operational Check:** open a synchronized Customer and verify the presence of CE files (e.g., Customer agreement) in the DocSolutions FactBox. Perform download, open, and upload operations to validate permissions and folder path.

DOCSOLUTIONS FOR DYNAMICS CE App For Microsoft Dynamics 365 Business Central

Contact us for more info:
<https://www.eos-solutions.app/en/contact.html>

The features of the DocSolutions for Dynamics CE app for Microsoft Dynamics 365 Business Central require a **subscription**.

This subscription can be activated from the Subscriptions Control Panel page or directly from the system's notification messages by clicking the link to launch the subscription wizard.

