User Guide for Microsoft Dynamics 365 Business Central

Product: SD Document Pack

Release: D365 BC V24+

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2 Getting Started

SD Document Pack provides you with a document pack of the most used documents in Microsoft Dynamics 365 Business Central. Built to present a professional and consistent company image, the colour scheme and appearance of the report and document headers and footers are standardised across all the supplied documents.

With SD Document Pack, you can easily define your header and footer colours on the supplied documents and reports, matching the colours to your company logo or branding. You can also define and display both the static and dynamic information printed in the header and footer of these documents.

You can define company branding for the supplied documents and reports, linking your company branding to an individual report and choosing what brand to display based on definable branding filters. With SD Document Pack, you can also easily define a barcode and the barcode content, which you can then choose to print in the customisable document info panel in the header of the supplied documents and reports.

SD Document Pack provides you with the flexibility to define the fields, field captions, and the field formatting that will display in the customisable document info panel in the header of the supplied documents and reports. You can also control the address formatting on the document and define the text displayed in the optional report footers of the documents. You can also setup a default bank account to display on the pre-configured documents or associate bank account details with a particular currency and display these bank details when the corresponding currency is printed on the document. You can choose to display commodity code information on the supplied Sales Shipment, Delivery Docket, Sales Order Confirmation, Sales Invoice and Proforma Invoice Reports.

SD Document Pack enables you to print Payment Services on the supplied Sales Order Confirmation, Proforma Invoice and Sales Invoice. Electronic Document versions for several reports in the UBL-2.0 format are available in SD Document Pack.

All the above flexibility is achievable from the SD Document Pack Setup page with no need to code.

3   A Configurable Layout

All highlighted areas in the below report are configurable. Header background colour and text, and footer background colour and text (red and blue in the document below) are also configurable *(Figure 3-1)*.

Figure 3-1

4 Installing SD Document Pack

SD Document Pack is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

The **Allow HttpClient Requests** option is automatically enabled on install of SD Document Pack. Switching on the **Allow HttpClient Requests** option for SD Document Pack in **Extension Management** allows SD Document Pack to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

4.1 Security Setup

We have provided the following permission sets for SD Document Pack: SDY DP ADMIN *(Figure 4-1)*.
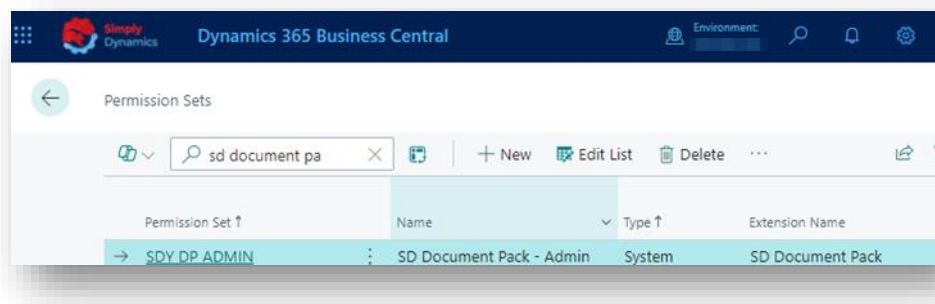

Figure 4-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- D365 BUS FULL ACCESS includes SDY DP ADMIN permissions.

4.2   Choosing the SD Document Pack Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 4-2)*.
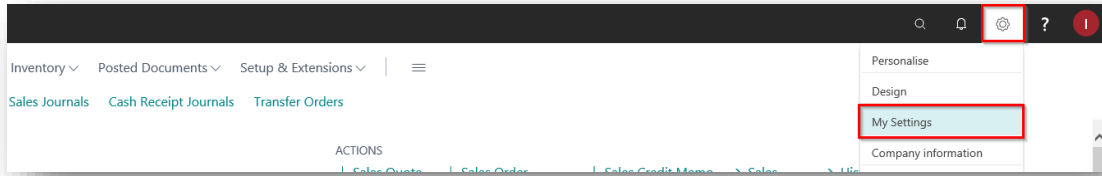

Figure 4-2

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 4-3)*.
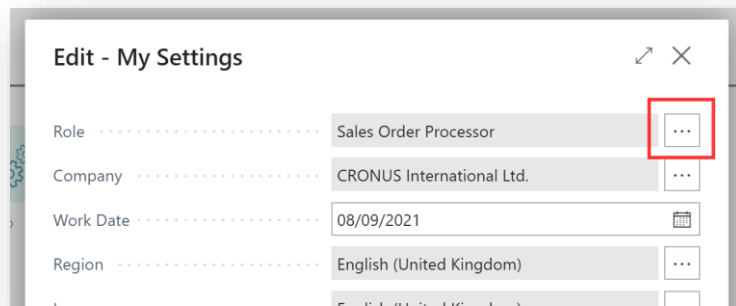

Figure 4-3

3. You should see **SD Document Pack** in the list of Roles *(Figure 4-4)*.
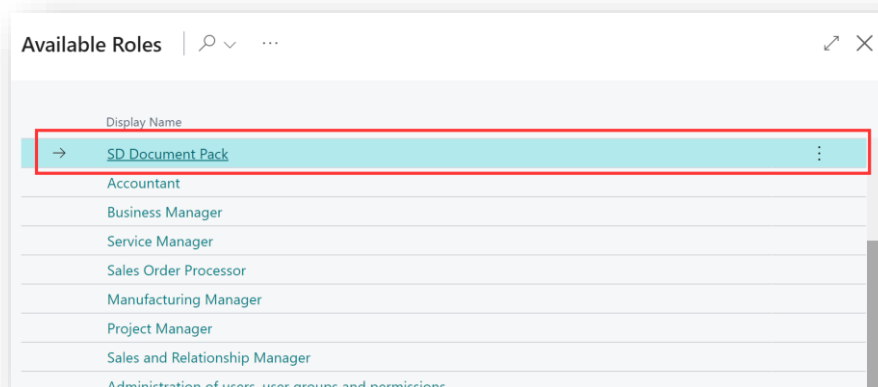
Figure 4-4

4. Choose **SD Document Pack** and click **OK**.

5. The **SD Document Pack** Role should now be displayed in the **Role** field. Click **OK** to close the **My Settings** page *(Figure 4-5)*.
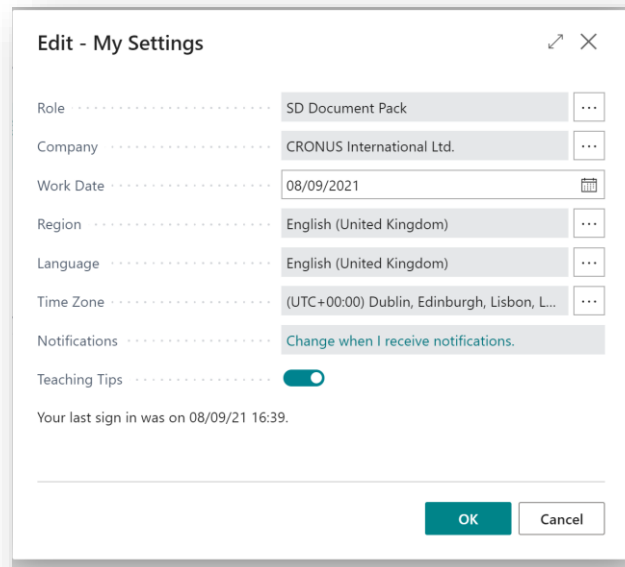

Figure 4-5

4.3 Accessing the SD Document Pack Pages

Use the **Tell Me** to search for SD Document Pack pages. Begin typing **SD**, **SDY**, or **Document** to see a list of the SD Document pages *(Figure 4-6)*.
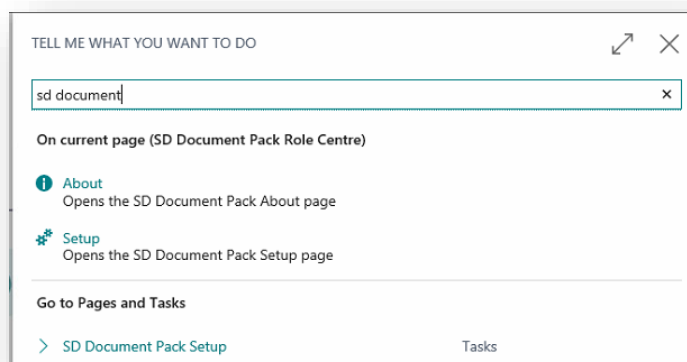
Figure 4-6

4.4 Bookmarking the SD Document Pack Activities to Your Role Centre

For easy access to SD Document Pack, you can bookmark the SD Document Pack Activities page to your default Role Centre.

Search for **SD Document Pack Activities** in the Tell Me and choose the Book Mark action to the right of the result *(Figure 4-7)*.

Figure 4-7

The SD Document Activities is now available in the navigation menu on your Role Centre *(Figure 4-8)*.

Figure 4-8

4.5 Activating the SD Document Pack Licence

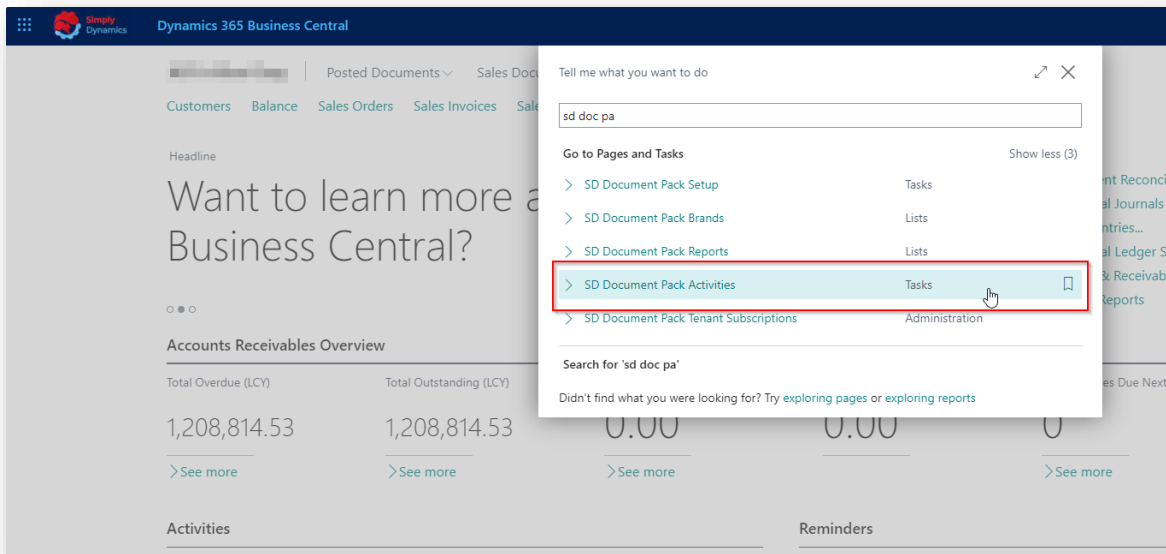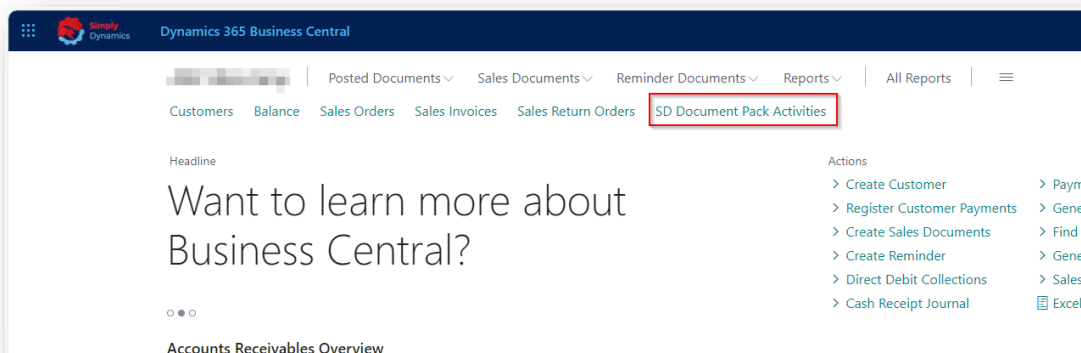To use **SD Document Pack**, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Document Pack Setup** card. When the **SD Document Pack Setup** card opens, you will be prompted that "Your SD Document Pack license needs to be validated." Choose **Yes** *(Figure 4-9)*.
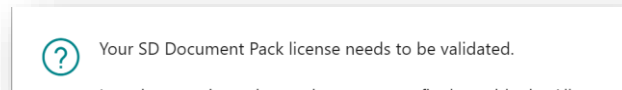
Figure 4-9

2. You will then see the **Activate your product** page.

4.5.1 Activating the SD Document Pack Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free 30 day trial:

1. In the **Activate your Product** page *(Figure 4-10)*:
   Enter your company name in **Company Name.**
   Enter your company email in **Email.**
   Choose **Free Trial.**

Figure 4-10

2. You are then prompted to choose **Yes** to activate your free trial. *(Figure 4-11)*.

Figure 4-11

3. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial *(Figure 4-12)*.

Figure 4-12

4. Choose **Finish** to exit the page.

5. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

4.5.2   Activating the SD Document Pack Licence with a Product Key

Take the following steps if you have received a Product Key from Simply Dynamics Ltd:

1. In the **Activate your product** page *(Figure 4-13)*:
    Enter your company name in **Company Name.**
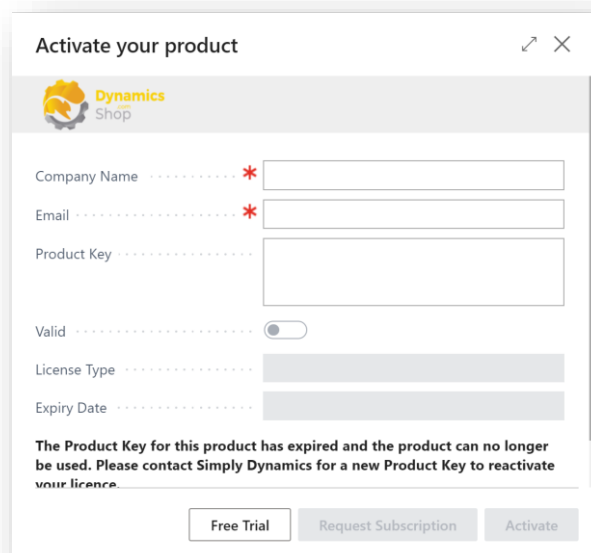   Enter your company email value in **Email.**
    Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.
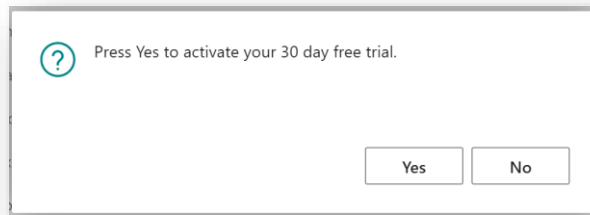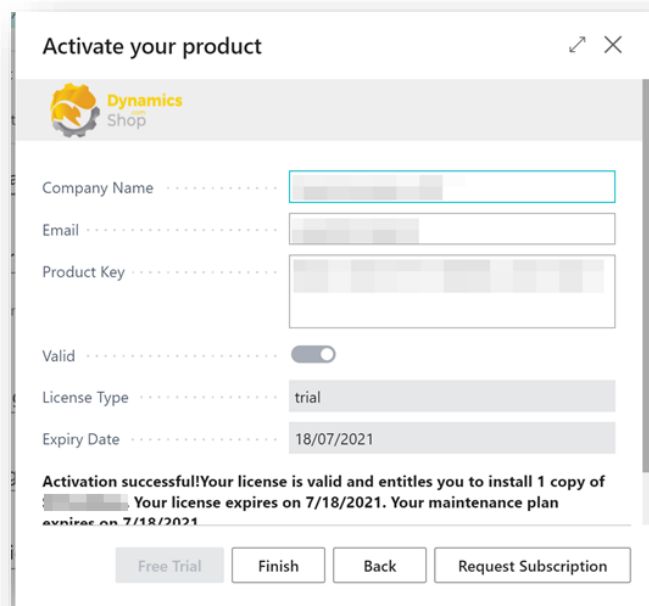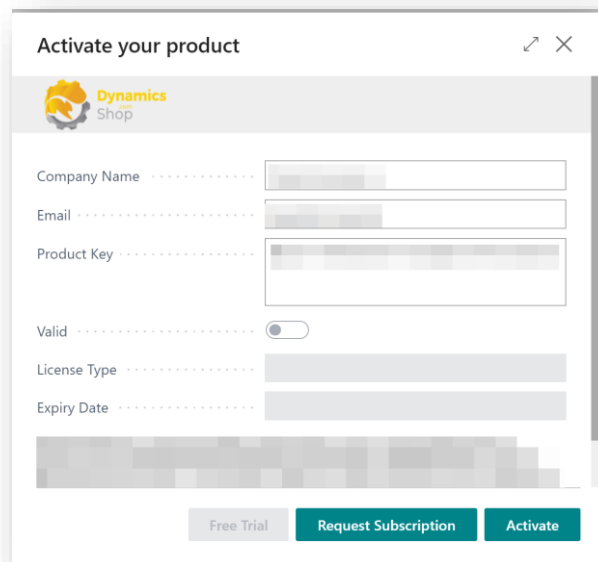

Figure 4-13

2. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the expiration date of your subscription licence.

3. Choose **Finish** to exit the page.

4.6 Setup and Configuration

4.6.1 SD Document Pack Assisted Setup

You can easily import default setup for each supplied report in SD Document Pack using the **Assisted Setup** Action on the **SD Document Pack Setup** card.

1. In the **SD Document Pack Setup** page, from the menu choose the **Home** group, and then **Assisted Setup** *(Figure 4-14)*.
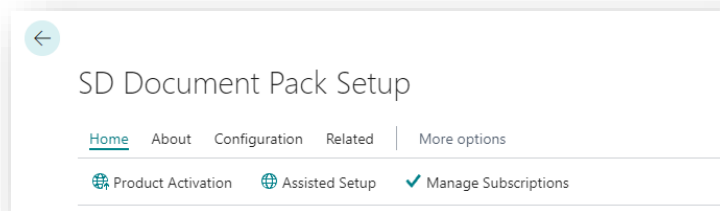
Figure 4-14

2. You are prompted that importing setup will overwrite and modify existing data in SD Document Pack. Choose **Yes** if this is your first time to use SD Document Pack and you have not already created any setup in SD Document Pack *(Figure 4-15)*.

Figure 4-15

3. You are then prompted, "Are you sure?" Choose **Yes** *(Figure 4-16)*.
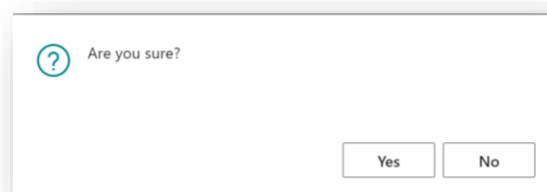
Figure 4-16

4. You will see a prompt that the default setup has imported. Choose **OK** *(Figure 4-17)*.

Records have successfully imported.

OK
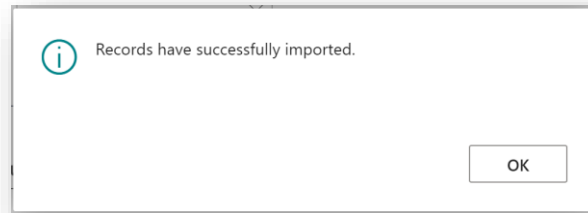
Figure 4-17

5 Using SD Document Pack

5.1 SD Document Pack – Setup Card

The **SD Document Pack Setup** card is accessed from the **SD Document Pack Role Centre**, by selecting the **Setup** cue, or, by searching for the **SD Document Pack Setup** page in the **Tell Me** *(Figure 5-1)*.
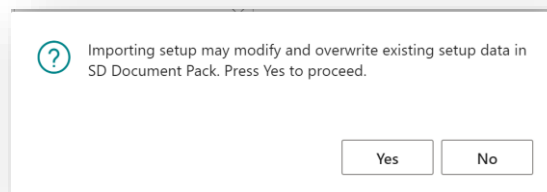

Figure 5-1

In the **SD Document Pack Setup** page, the **General** FastTab contains the following fields *(Figure 5-2)*:

Figure 5-2

- **Default Bank Account** – Specify the **Default Bank Account**, the details of which you would like to display in the Bank Details section located in the

footer of the SD Document Pack reports. Choose from a list of existing Bank Accounts in your Microsoft Dynamics 365 Business Central Application.

If you do not specify a **Default Bank Account**, SD Document Pack will look to use the **Currency Bank Accounts** details specified in the **Currency Bank Accounts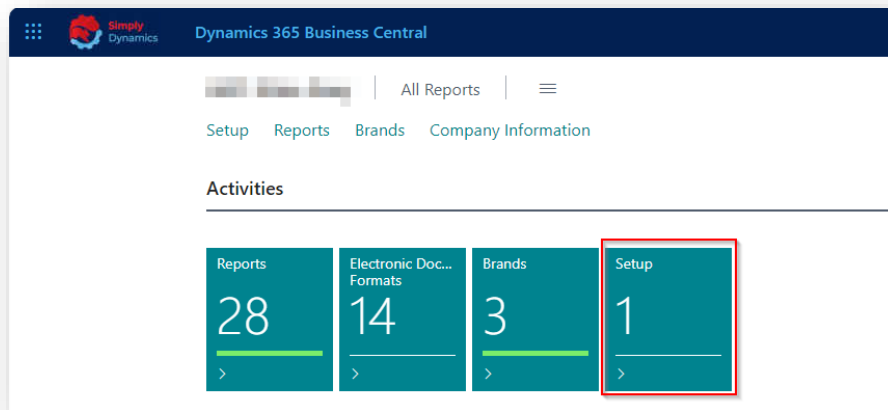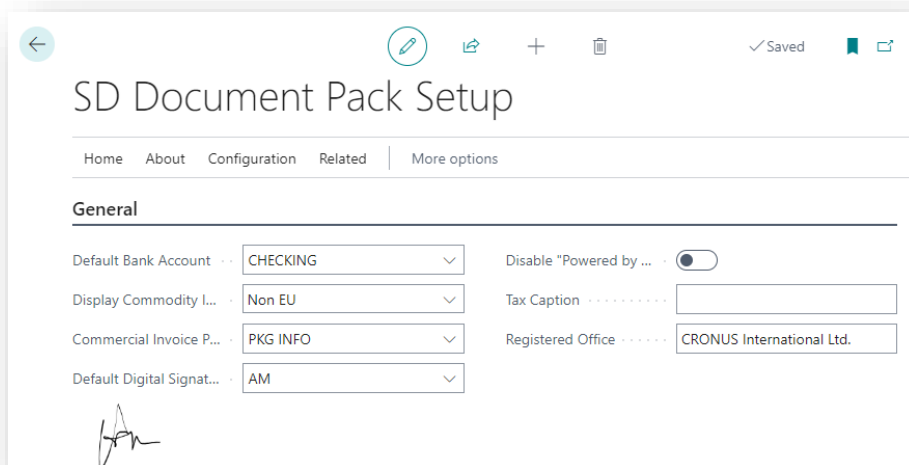** FastTab on the SD Document Pack Setup page. If you do not specify either **Currency Bank Accounts** details, or a **Default Bank Account**, SD Document Pack will use the **Bank Account** details from your **Company Information** setup.

- **Display Commodity Info** – Select this option to specify if commodity codes should be displayed on relevant SD Document Pack documents. Commodity code information can be displayed on the supplied SD Document Pack Sales Shipment, Delivery Docket, Sales Order Confirmation, Sales Invoice, Proforma Invoice and the three Commercial Sales Invoices Reports. Options are **<blank>**, **All** or **Non EU**.
    - **<blank>** - Commodity code information will not print on the relevant SD Document Pack documents.
    - **All** – Commodity code information will print on all the relevant SD Document Pack documents.
    - **Non EU** - Commodity codes information will print on the relevant SD Document Pack documents for those Customers flagged as Non EU.

- **Commercial Invoice Packaging Info** – Select a Standard Text Code to display extended texts on the SD Document Pack's Commercial Invoices. Non-standard packing information is printed on the Commercial Invoices using manual insert and update of the Standard Texts. On print of a Commercial Invoice, SD Document Pack warns the user if the Standard Text Code specified on the Commercial Invoice Packaging Info field in the Setup Card is not found on the sales lines for the Order/Invoice.

- **Default Digital Signature** – Choose the default digital signature that will print on the relevant reports. The option to print a digital signature is available on the SD Document Pack Sales Invoice, Sales Credit Memo, and the Pro Forma Invoice. To define digital signatures, from the menu, choose the **Related** menu group and then the **Digital Signature** action.

- **Disable "Powered by** www.DynamicsShop.com**"** – This option is only available if you have a full licence (not a trial licence) for SD Document Pack. Choosing this option allows users to hide the "Powered by

www.DynamicsShop.com" text that is stamped on the SD Document Pack reports.

- **Tax Caption** -Enter the Tax Caption to print on the SD Document Pack reports e.g., VAT, GST, TVA. If this field is blank the Tax Caption defaults to VAT.

- **Registered Office** – Enter your Registered Office. The value entered here will print in the footer section of the SD Document Pack reports.
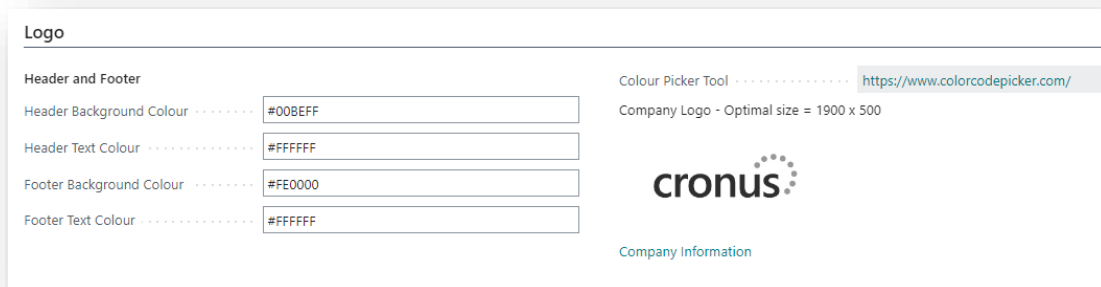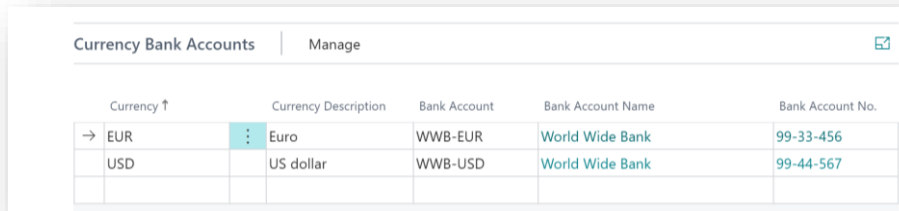
Expand the **Logo** FastTab *(Figure 5-3)*.

Figure 5-3

The **Logo** FastTab allows you to easily define the header and footer background and text colours on your SD Document Pack reports. You can use the link to the colour code picker tool on **https://www.colorcodepicker.com/** to upload your company logo to the website to get the HEX colour code of your Company Logo and Company Branding and match to the header and footer colours on your reports. The optimal size of the Company Logo for printing on SD Document Pack reports is 1900 x 500 pixels. A quick link to the standard Dynamics 365 Business Central Company Information page is surfaced on the Setup Card to allow for easy Company logo load.

- **Header Background Colour** – Choose a hexadecimal colour code to use as the header background colour on the SD Document Pack reports.

- **Header Text Colour** – Choose a hexadecimal colour code to use as the header text colour on the SD Document Pack reports.

- **Footer Background Colour** – Choose a hexadecimal colour code to use as the footer background colour on the SD Document Pack reports.

- **Footer Text Colour** – Choose a hexadecimal colour code to use as the footer text colour on the SD Document Pack reports.

The **Currency Bank Accounts** FastTab *(Figure 5-4)* lists the bank account details to display on a document report based on the document's currency. The bank information section is in the footer section of the SD Document Pack reports.
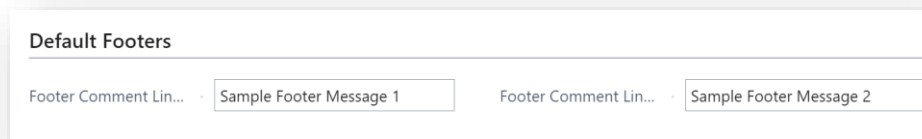

Figure 5-4

- **Currency –** Select the currency code for which the **Bank Account** is to display in the bank information section on the SD Document Pack document.

- **Currency Description** - Displays the description of the chosen **Currency**.

- **Bank Account –** Choose the **Bank Account** to display for the selected **Currency** in the bank information section on the SD Document Pack document.

- **Bank Account Name –** Displays the name of the chosen **Bank Account**.

- **Bank Account No. -** Displays the bank account no.

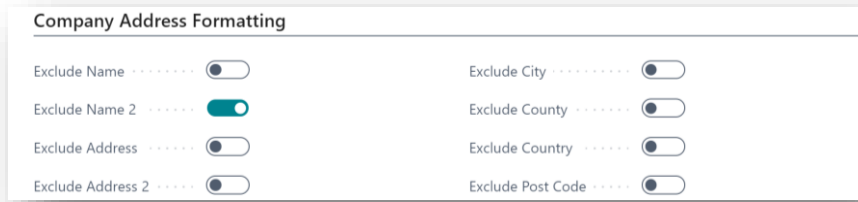Expand the **Default Footers** FastTab *(Figure 5-5)*.

Figure 5-5

- **Footer Comment Line 1** – Enter a default footer to print on the SD Document Pack reports. If there are no footers defined on the individual Report Cards, these default footer comments are printed.

- **Footer Comment Line 2** – Enter a default footer to print on the SD Document Pack reports. If there are no footers defined on the individual Report Cards, these default footer comments are printed.

The **Company Address Formatting** FastTab *(Figure 5-6)* defines what address fields to exclude when displaying the company address on the SD Document Pack reports.

Figure 5-6

- **Exclude Name** - When selected, the **Name** field is not displayed in the company address.

- **Exclude Name 2** - When selected, the **Name 2** field is not displayed in the company address.

- **Exclude Address** - When selected, the **Address** field is not displayed in the company address.

- **Exclude Address 2** - When selected, the **Address 2** field is not displayed in the company address.

- **Exclude City -** When selected, the **City** field is not displayed in the company address.
- **Exclude County** - When selected, the **County** field is not displayed in the company address.

- **Exclude Country** - When selected, the **Country** field is not displayed in the company address.

- **Exclude Post Code** - When selected, the **Post Code** field is not displayed in the company address.

The **Address Formatting** FastTab *(Figure 5-7)* defines what address fields to exclude when displaying the addresses on the SD Document Pack reports.
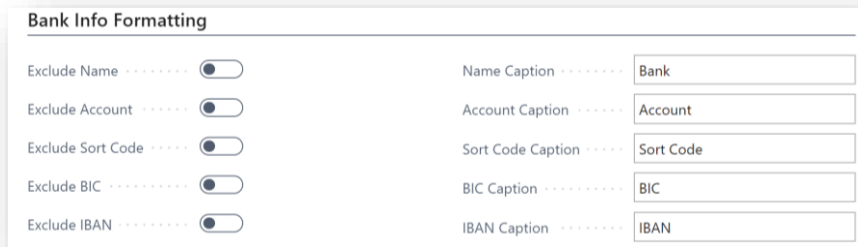

Figure 5-7

- **Exclude Name** - When selected, the **Name** field is not displayed in the address.

- **Exclude Name 2** - When selected, the **Name 2** field is not displayed in the address.

- **Exclude Contact** - When selected, the **Contact** is not displayed in the address.

- **Exclude Address** - When selected, the **Address** field is not displayed in the address.

- **Exclude Address 2** - When selected, the **Address 2** field is not displayed in the address.

- **Exclude City -** When selected, the **City** field is not displayed in the address.

- **Exclude County** - When selected, the **County** field is not displayed in the address.

- **Exclude Country** - When selected, the **Country** field is not displayed in the address.

- **Exclude Post Code** - When selected, the **Post Code** field is not displayed in the address.

The **Bank Info Formatting** FastTab *(Figure 5-8)* defines what bank fields to exclude and what field captions to display when displaying the bank details in the footer section of the SD Document Pack reports.
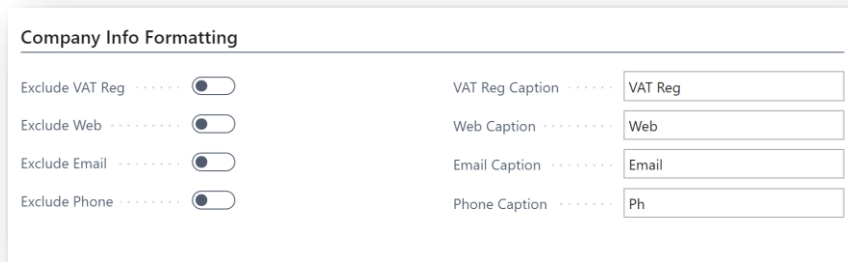

Figure 5-8

- **Exclude Name** - When selected, the **Bank Name** field is not displayed in the Bank Information section of the reports.

- **Exclude Account** - When selected, the **Bank Account** field is not displayed in in the Bank Information section of the reports.

- **Exclude Sort Code** - When selected, the **Bank Sort Code** is not displayed in the Bank Information section of the reports.

- **Exclude BIC** - When selected, the **BIC/SWIFT** field is not displayed in the Bank Information section of the reports.

- **Exclude IBAN** - When selected, the **IBAN** field is not displayed in the Bank Information section of the reports.

- **Name Caption** – Define the caption to display for the **Bank Name** field.

- **Account Caption** - Define the caption to display for the **Bank Account** field.

- **Sort Code Caption** - Define the caption to display for the **Bank Sort Code** field.

- **BIC Caption** - Define the caption to display for the **BIC/SWIFT** field.

- **IBAN Caption** - Define the caption to display for the **IBAN** field.

The **Company Info Formatting** FastTab *(Figure 5-9)* defines what fields to exclude and what field captions to display when displaying the company details in the footer section of the SD Document Pack reports.
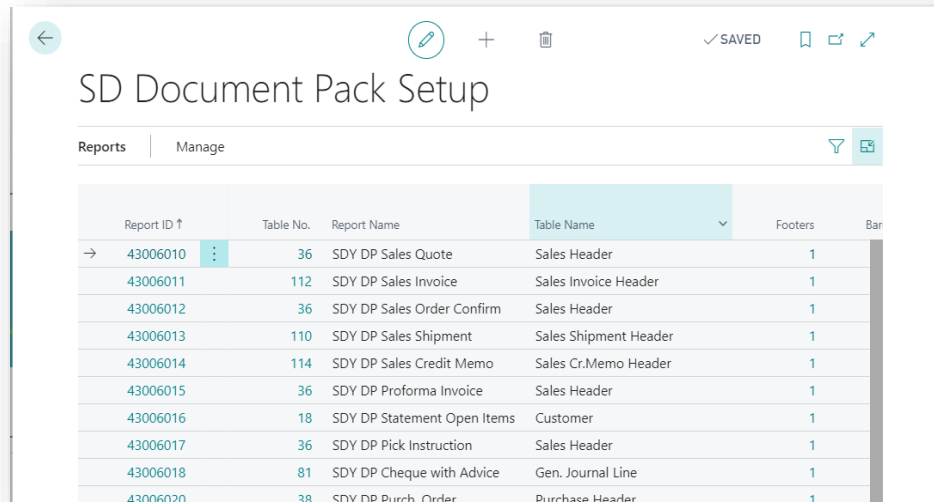

Figure 5-9

- **Exclude VAT Reg** - When selected, the **VAT Reg** field is not displayed in the bank information section on the SD Document Pack document.

- **Exclude Web** - When selected, the **Web** field is not displayed in the bank information section on the SD Document Pack document.

- **Exclude Email** - When selected, the **Email** field is not displayed in the Company Information section of the reports.

- **Exclude Phone** - When selected, the **Phone** field is not displayed in the Company Information section of the reports.

- **VAT Reg Caption** – Define the caption to display for the **VAT Reg** field.

- **Web Caption** - Define the caption to display for the **Web** field.

- **Email Caption** - Define the caption to display for the **Email** field.

- **Phone Caption** - Define the caption to display for the **Phone** field.

The **Reports** FastTab *(Figure 5-10)* displays the list of the SD Document Pack reports. From here, you can manage existing SD Document Pack report definitions.

- **Report ID** – Displays the ID of the report.

- **Table No.** – Displays the Microsoft Dynamics 365 Business Central Table No. on which the report is based.

- **Report Name** – Displays the name of the report in **Report ID**.

- **Table Name** – Displays the name of the table in **Table No**.

- **Footers** – Displays a flowfield count of the footers defined for the report.

- **Barcodes** - Displays a flowfield count of the barcodes defined for the report.

- **Info Box Items** - Displays a flowfield count of the fields that will display in the Report Info Box on the report.

- **Report Selections** - Displays a flowfield count of the number of occurrences of the report in the standard Microsoft Dynamics 365 Business Central Report Selection table.

The **Electronic Document Formats** list page *(Figure 5-11)* displays a list of the current standard Electronic Document Formats in Dynamics 365 Business Central and the SD Document Pack Electronic Document Formats. These Electronic Document Formats can be

used with our **SD Document Sender** App to email electronic documents or place the electronic documents in Azure Blob Storage.

Figure 5-11

From the menu in the **Reports** FastTab, choose the **Report Selection** action to open the **SD Document Pack Report Selection** page and easily update the default report selection settings *(Figure 5-12)*.
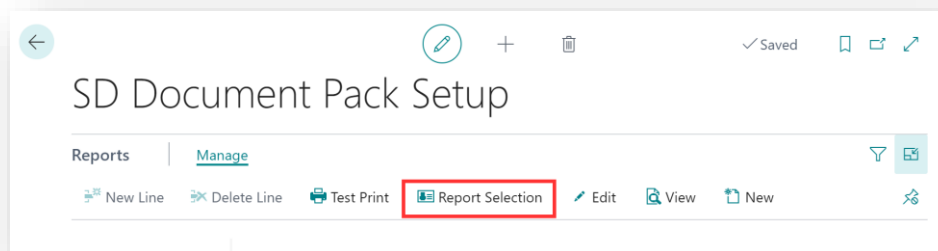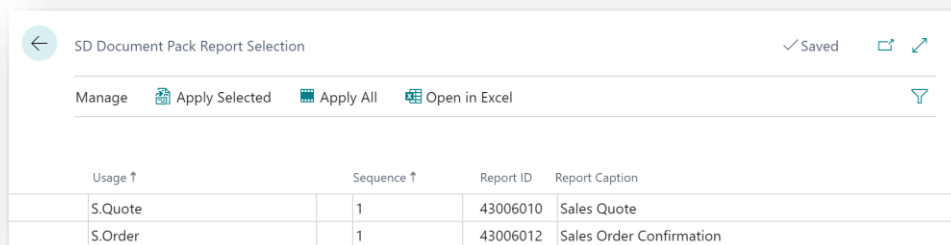

Figure 5-12

The **SD Document Pack Report Selection** list is a temporary table populated from the **SD Document Pack Reports List** page. You can choose to **Apply Selected** or **Apply All** records to update the standard Dynamics 365 Business Central **Report Selection** tables *(Figure 5-13)*.

Figure 5-13

5.2   SD Document Pack – Reports Setup

SD Document Pack allows you the flexibility to define the fields that you want to display in the Report Info Box for each document and report included in SD Document Pack. From the **SD Document Pack Setup** Card, from the **Related** group, choose **Reports Setup** *(Figure 5-14)*.
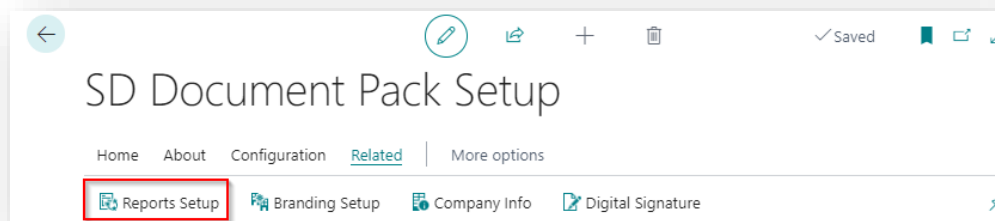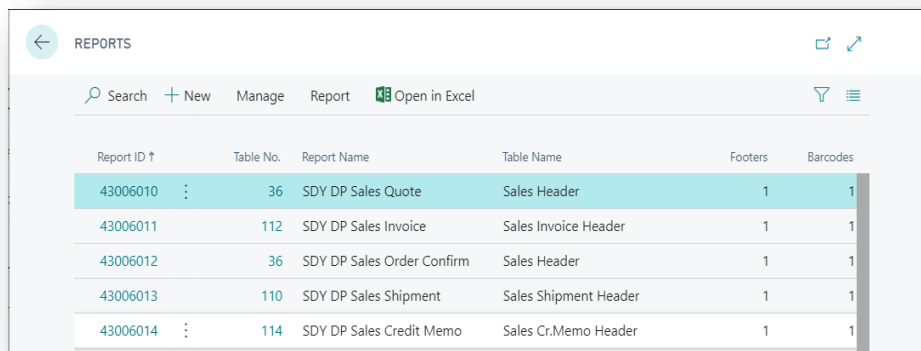

Figure 5-14

The **Reports** list page is displayed and shows the reports that have been setup with their individual settings *(Figure 5-15)*.

Figure 5-15

The **Reports** list page contains the following fields:

- **Report ID** – Displays the **Report ID** of the SD Document Pack report to which the settings will apply.

- **Report Name** – Displays the name of the report selected in **Report ID**.

- **Table No.** – Displays the Microsoft Dynamics 365 Business Central **Table No.** on which the report is based.

- **Table Name** – Displays the name of the table selected in **Table No**.

- **Footers** – Displays a flowfield count of the footers defined for the report.

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- **Barcodes** – Displays a flowfield count of the barcodes defined for the report.

- **Info Box Items** – Displays a flowfield count of the fields that will display in the Report Info Box on the report.

- **Brands** - Displays a flowfield count of the Brands that are linked to the report.

- **Report Selections** - Displays a flowfield count of the number of occurrences of the report in the standard Microsoft Dynamics 365 Business Central Report Selection table.

To view or edit existing settings for an individual report, from the **Manage** group choose **Edit** or **View** *(Figure 5-16)*. This will open the **Report Card**.
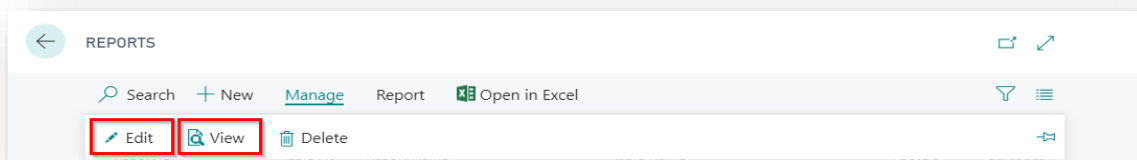

Figure 5-16

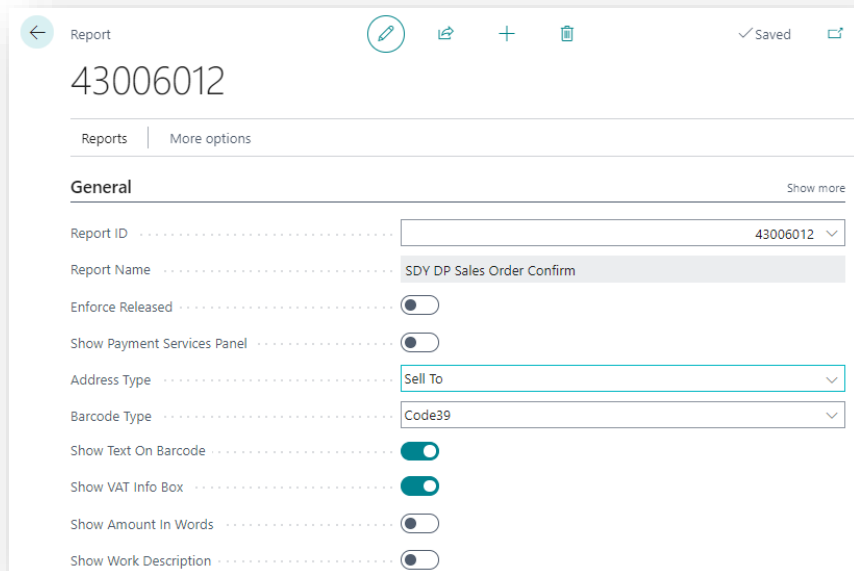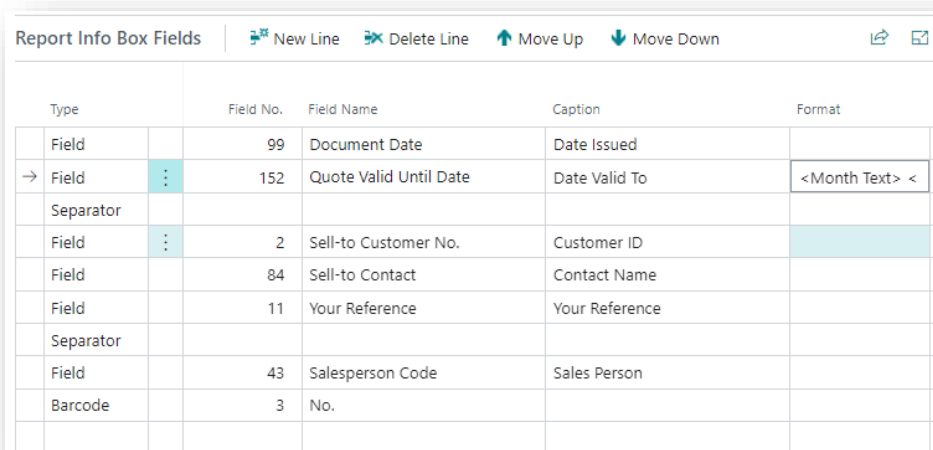In the **Report Card**, expand the **General** FastTab *(Figure 5-17)*:

Figure 5-17

- **Report ID** – The **Report ID** of the SD Document Pack report to which the settings will apply.

- **Report Name** – Displays the name of the report selected in **Report ID**.

- **Table No.** – Displays the Microsoft Dynamics 365 Business Central **Table No.** on which the report is based.

- **Table Name** – Displays the name of the table selected in **Table No.**

- **Enforce Released** – Select this option to print the SD Document Pack report only for those transactions that have a Status of **Released**.

- **Show Payment Services** – Choose this checkbox to print Payment Services logo and details. This setting applies only to certain reports such as the **SDY DP Sales Order Confirmation**, the **SDY DP Proforma Invoice** and the **SDY DP Sales Invoice**.

- **Address Type** – Define the address to print on the SD Document Pack document or report. Choose from an option of **Sell To** Address, **Ship To** Address or **None**. This option is applicable to those reports that have a Sell To a or Ship To Address in the document header.

- **Barcode Type** – Specify the type of Barcode that you want to print on the document. Options are **Code 39**, **Code 128B**, **QR Code**. A barcode will not render on a report if the value for the barcode has invalid characters for the barcode type.

- **Show Text on Barcode** - Choose this checkbox to print the text value of the barcode under the barcode.

- **Show VAT Info Box** – Choose this option if you want the VAT Info Box to print on the SD Document Pack report.

- **Show VAT in LCY** – Choose this option to display the VAT Amount of the SD Document Pack Document in LCY. This option is applicable to the **SDY DP Sales Invoice**, the **SDY DP Sales Credit Memo** and the **SDY DP Sales Commercial Invoice.**

- **Show Amount in Words** – Choose this option if you want the Total Amount on the SD Document Pack Document to print in words.

- **Show Work Description** - Choose this option if you want the show the work description on the relevant SD Document Pack Documents.

- **Show Confirmed Paid** - Choose this option if you want a Confirmed Paid stamp to print on the **SDY DP Sales Invoice**.

- **Show Digital Signature** – Select this option if you want a Digital Signature to print for the SD Document Pack Document. This option is applicable to the **SDY DP Sales Invoice**, the **SDY DP Sales Credit Memo** and the **SDY DP Proforma Invoice.**

- **Digital Signature** – Select the Digital Signature you want to print on the Document. If left blank, the Default Digital Signature from the SD Document Pack Setup Card is printed.

The **Report Info Box Fields** FastTab *(Figure 5-18)* allows you to dynamically define and choose the fields, captions and field formatting that will display in the Report Info Box Area on the SD Document Pack documents.

Figure 5-18

Note: You can display up to a maximum of 10 lines of information in the Report Info Box.

- **Type** – Choose the type of item to display in the **Report Info Box** on the Document. Options are **Field**, **Separator**, **Barcode** or **Text**.
    - **Field** – The item to display will be a field that exists in the table displayed in **Table No**.
    - **Separator** – The item to display will be a separator (a blank line).
    - **Barcode** – The item to display will be a barcode (the definition of which is picked up from the **Barcodes Type** field).

o **Text** – Choose this option to display a text comment (as space allows) in the Report Info Box.

- **Field No.** – If the **Type** is **Field** or **Barcode**, select a **Field No.**, from the table displayed in **Table No**. The value of this field will be printed, depending on the **Type** chosen, in the **Report Information Box** as a field value or as a barcode value. Just to note that a barcode will not render on a report if the value for the barcode has invalid characters for the barcode type.

- **Field Name** – If the **Type** is **Field** or **Barcode**, displays the **Field Name** of the field chosen in **Field No.**

- **Caption** – If the **Type** is **Field**, specify the caption that you want to display for this **Field No**. A caption will display only if a value exists for the field on the relevant table record. If the **Type** is **Text** enter the text you want printed in the Report Info Box.

- **Format** - If the **Type** is **Field**, specify the standard format that you want to apply to the value of this **Field No.** For example, if the field is of type date, and you want to see the date displayed as 12. April 2016 you would choose to specify a format of <Closing><Day>. <Month Text> <Year4>

The **Report Footers** FastTab *(Figure 5-19)* allows you to define the optional two lines of text displayed in the footer of each SD Document Pack document. If these fields are left blank, the text defined for Footer Comment Line 1 and Footer Comment Line 2 on the SD Document Pack Setup Card are used.
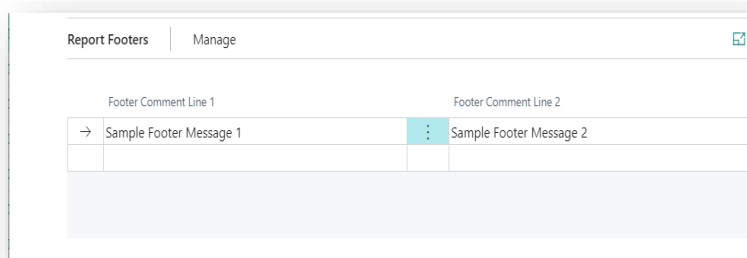
- **Footer Comment Line 1** – Enter the first comment line of text.

- **Footer Comment Line 2** – Enter the second comment line of text.

5.3   SD Document Pack – Branding Setup

SD Document Pack allows you the flexibility to define for each Document Pack document, the company branding that you want to display on each report. You link the branding to a report and display the brand information based on user defined report filters. For example, if the Sales Quote has a currency code "X," then use this branding code "Y."

From the **SD Document Pack Setup** Card, from the **Process** group, choose **Branding Setup** *(Figure 5-20)*.
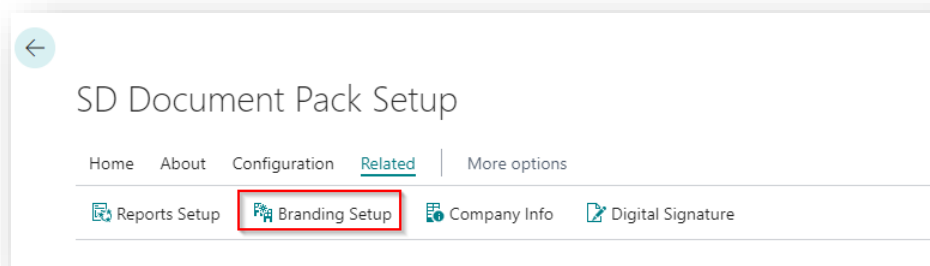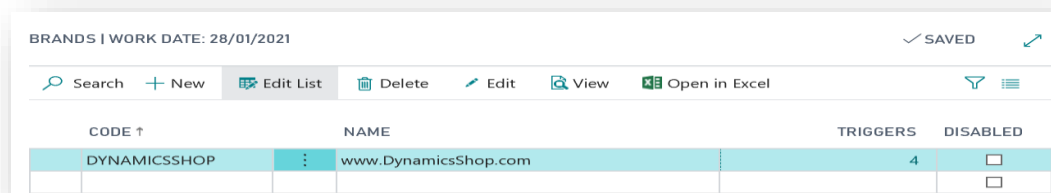
Figure 5-20

The **Brands** list is displayed and shows the various Brand Codes that have been setup in SD Document Pack *(Figure 5-21)*.

Figure 5-21

- **Code** – Enter a unique code to identify your brand.

- **Name** – Enter a user-defined name for your brand.

- **Triggers** – A flowfield count of the SD Document Pack documents and reports that have been associated with this Brand.

- **Disabled** – Select this checkbox to disable the brand from displaying on the reports defined in Triggers.

To create a new brand code and branding details, from the ribbon, choose **New.** To view or edit existing Brand details, from the ribbon, choose **Edit** or **View** *(Figure 5-22)*. This will open the **Brand Card**.
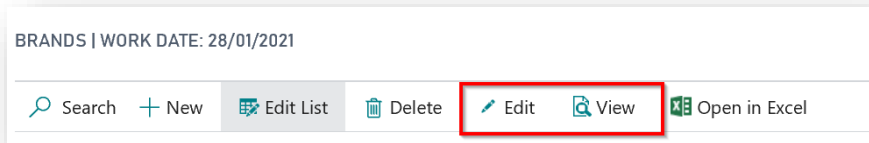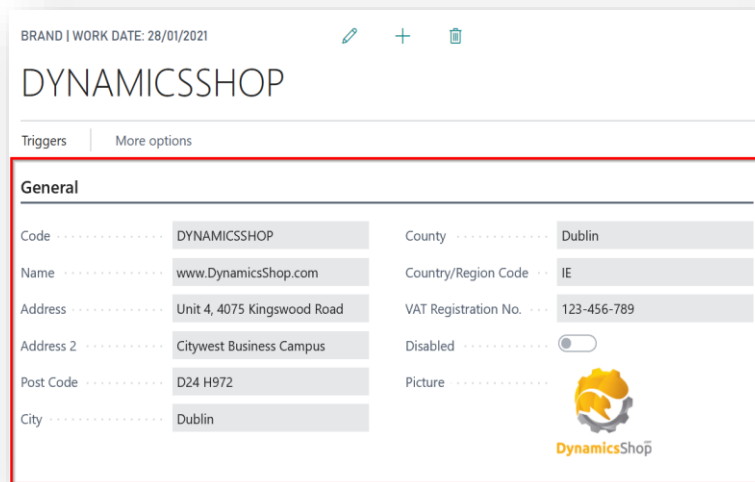

Figure 5-22

5.4 SD Document Pack – Brand Card

In the **Brand Card**, expand the **General** FastTab *(Figure 5-23)*:
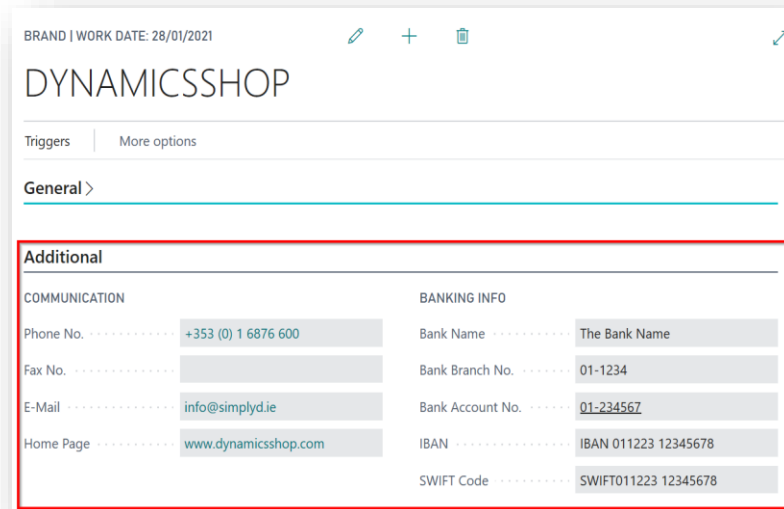
Figure 5-23

- **Code** - Enter a unique user-defined code to identify the brand.

- **Name** - Enter a user-defined name for the brand.

- **Address** - Enter an address for the brand.

- **Address 2** - Enter a second address line for the brand.

- **Post Code** - Enter a post code for the brand.

- **City** - Enter a city for the brand.

- **County** - Enter a county for the brand.

- **Country/Region Code** - Enter a country/region code for the brand.

- **VAT Registration No.** - Enter a VAT registration No. for the brand.

- **Disabled** - Select this checkbox to disable the brand details from printing on the reports defined in Triggers.

- **Picture** - Enter the Picture/Logo for the Brand.

The **Additional** FastTab *(Figure 5-24)* allows you to define additional details to print for the brand.
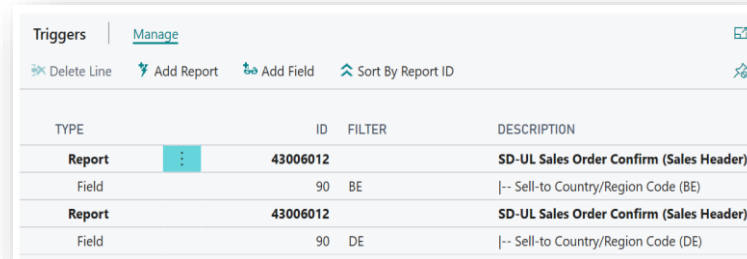
Figure 5-24

- **Phone No.** - Enter a phone no. for the brand.

- **Fax No.** - Enter a fax no. for the brand.

- **E-Mail** - Enter an e-mail for the brand.

- **Home Page** - Enter a second address line for the brand.

- **Bank Name** - Enter a bank name for the brand.

- **Bank Branch No.** - Enter a bank branch no. for the brand.

- **Bank Account No.** - Enter a bank account no. for the brand.

- **IBAN** - Enter an IBAN for the brand.

- **SWIFT Code** - Enter a SWIFT code for the brand.

The **Triggers** FastTab *(Figure 5-25)* allows you to define the reports that are linked to the brand and the filters that must exist for the brand details to print on the Document Pack report.
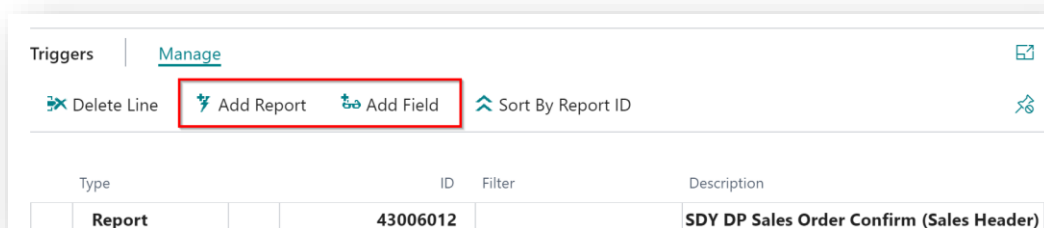
- **Type** - Options are **Report** or **Field**.

- **ID** – If a **Type** of **Report** is displayed, this field displays the ID of the Document Pack document or report that the branding is linked to. If a **Type** of **Field** is displayed, this field displays the ID of the field that the filter will be applied to.

- **Filter** - Applicable only if the **Type** is **Field**. Enter a filter for the field chosen in **ID**.

- **Description** – If the **Type** is **Field**, displays the description of the filter to apply to the field chosen in **ID**. If the **Type** is **Report**, displays the report name and the name of the table that the field filter, chosen in **ID**, will apply to.

There are several Actions on the **Triggers** FastTab *(Figure 5-26)*:

- **Add Repor**t - Choose this Action to add a report to the Brand.

- **Add Field** - Choose this Action to add a Field and Filter to specify the conditions when the Brand should be applied to the report.

6   SD Document Pack and Brexit

SD Document Pack includes three Commercial Invoices that contain information necessary for Brexit - one of the Commercial Invoices is based on a variant of the standard Sales Order Confirmation Report **SDY DP Sales Com Inv - Order**, a second Commercial Invoice is based on a variant of the standard Posted Shipment Report, **SDY DP Sales Com Inv - Ship,** and the third Commercial Invoice is based on a variant of the standard Posted Sales Invoice Report, **SDY DP Sales Com Inv - Invoice**.

These three Commercial Invoices print Tariff/Commodity Codes, Country of Origin, Net Weight, and Gross Weight for each line item if the **Display Commodity Info** field on the **SD Document Pack Setup** card is switched on. The supplied SD Document Pack Sales Shipment, Delivery Docket, Sales Order Confirmation, Sales Invoice, and Proforma Invoice also print Tariff/Commodity Codes, Country of Origin, Net Weight, and Gross Weight for each line item if the option to **Display Commodity Info** has been specified in the **Setup Card.**

Your Company EORI Number from the Company Information Card and the Customer EORI Number from the Customer Card prints on the three Commercial Invoices supplied in SD Document Pack.

Non-standard packing information is printed on the Commercial Invoices using manual insert and update of the Standard Texts on Sales Orders and Sales Invoices. On print of a Commercial Invoice, SD Document Pack warns the user if the Standard Text Code specified on the **Commercial Invoice Packaging Info** field in the **SD Document Pack Setup Card** is not found on the sales lines for the Order/Invoice.

Using the Branding functionality in SD Document Pack, regional VAT information can be added to the documents.

Figure 6-1

7 Modified SD Document Pack Reports in the 50000+ Custom Range

SD Document Pack allows modified SD Document Pack reports saved in the custom range (50000+) to be added to the SD Document Pack Setup. To add a report to the SD Document Pack Setup, the report must be a modified version of one of the supplied SD Document Pack reports.

We have published an event in Codeunit 43006010 – GetBaseTableForReport to accommodate custom reports *(Figure 7-1)*. The report object range is extended to include 50000…99999.

Figure 7-1

procedure GetBaseTableForReport(ReportID: Integer) TableNo: Integer

var

    Error01_Err: Label 'Not a valid SD Launch report.';

    IsHandled: Boolean;

begin

    OnBeforeGetBaseTableForReport(ReportID, TableNo, IsHandled);

    if IsHandled then

        exit;

The modified report will also need to subscribe to the SD Document Pack events below to use these features *(Figure 7-2)*.

```
[BusinessEvent(false)]
local procedure OnShowVATInfoBox(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)
begin
end;

[BusinessEvent(false)]
local procedure OnShowVATInLCY(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)
begin
end;

[BusinessEvent(false)]
local procedure OnShowSignatureSettings(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)
begin
end;

[BusinessEvent(false)]
local procedure OnShowAmountInWords(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)
begin
end;
```

Figure 7-2

[BusinessEvent(false)]

local procedure OnShowVATInfoBox(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)

begin

end;

[BusinessEvent(false)]

local procedure OnShowVATInLCY(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)

begin

end;

[BusinessEvent(false)]

local procedure OnShowSignatureSettings(ReportIDText: Text; var Show: Boolean; var IsHandled: Boolean)

begin

end;

```
[BusinessEvent(false)]

local procedure OnShowAmountInWords(ReportIDText: Text; var Show: Boolean; var
IsHandled: Boolean)

begin

end;



[BusinessEvent(false)]

local procedure OnShowWorkDescription(ReportIDText: Text; var Show: Boolean; var
IsHandled: Boolean)

begin

end;



[BusinessEvent(false)]

local procedure OnShowConfirmedPaid(ReportIDText: Text; var Show: Boolean; var
IsHandled: Boolean)

begin

end;
```

8   Uninstalling SD Document Pack

You can uninstall **SD Document Pack** using the Web Client:

1.   Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 8-1)*.
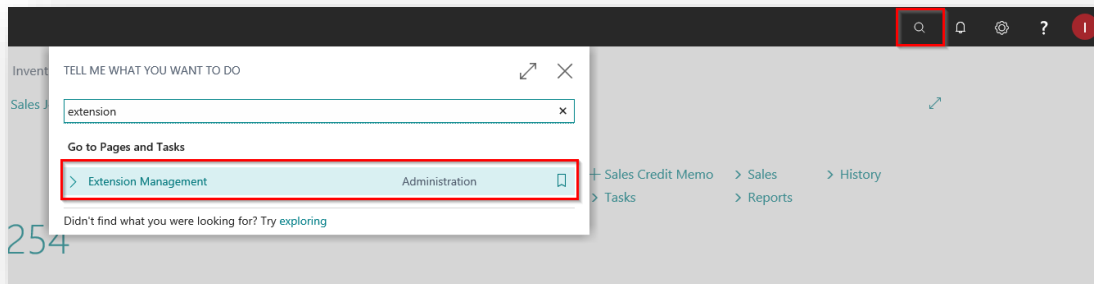

Figure 8-1

2.   In **Extension Management**, you should see the **SD Document Pack** App installed.

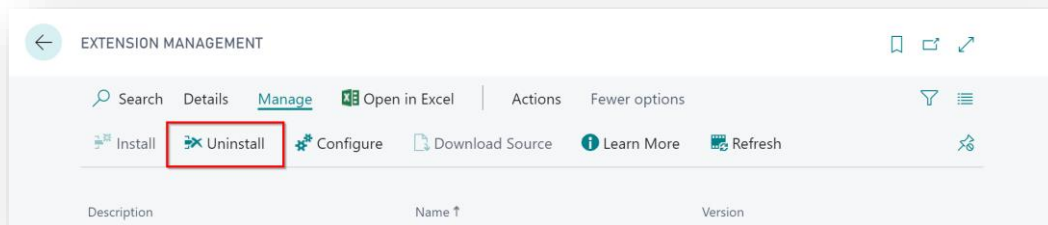3.   Select the **SD Document Pack** App and choose the **Uninstall** action (*Figure 8-2*).

Figure 8-2

Dynamics
Shop

IT Simply Makes

Business Sense with

Microsoft Dynamics 365

Simply Dynamics

Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.

Dynamics Shop

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

DynAzure

DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

Dublin Location

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Get Directions

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