

agilit<sup>z</sup> |  docu<sup>z</sup>Litz

## Doculitz: AI-Driven Document Intelligence for Dynamics 365

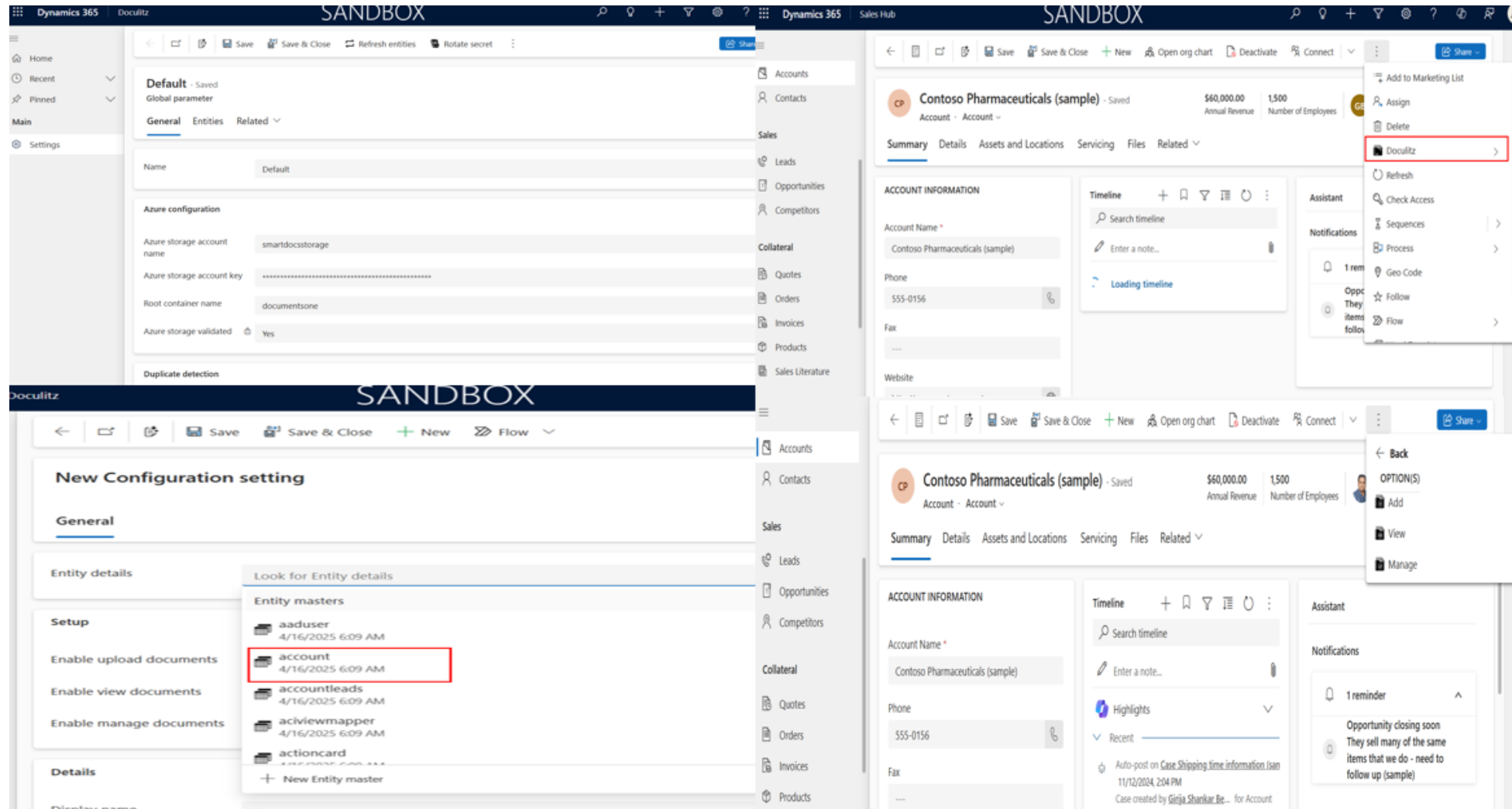
 revolutionizes how your organization manages documents within **Dynamics 365** by enabling secure, intelligent file handling at the entity level. With native integration to **Azure Blob Storage**, advanced **Azure AI-powered** search capabilities, and built-in duplication detection, Doculitz ensures a seamless and scalable document experience.

### Key Features:

- **Flexible File Upload:** Effortlessly upload documents in a variety of formats directly from Dynamics 365 entity records.
- **AI-Powered Content Search:** Instantly retrieve documents containing specific words or terms using intelligent, full-text search capabilities.
- **Duplicate File Detection:** Automatically identify and prevent redundant document uploads, ensuring data cleanliness and storage optimization.
- **Azure Blob Storage Integration:** Securely store and manage all uploaded documents in the cloud with scalable, enterprise-grade storage.
- **Entity-Level Binding:** Associate documents with specific Dynamics 365 entities (e.g., Contacts, Accounts, Cases) for contextual access and management.
- **Streamlined User Experience:** Intuitive interface designed for rapid document upload, search, and retrieval without leaving the Dynamics environment.

With **Doculitz**, empower your users with intelligent document management that enhances discoverability, prevents duplication, and integrates seamlessly with your existing Dynamics 365 workflows. Harness the power of AI to make document handling smarter, faster, and more efficient.

# Setup



The image displays three screenshots of the Dynamics 365 interface, illustrating the setup process for Doculitz integration.

**Top Left Screenshot:** Shows the 'Default' configuration page for a 'Global parameter'. The 'Azure configuration' section is visible, showing fields for 'Azure storage account name' (smartdocstorage), 'Azure storage account key' (masked), 'Root container name' (documentsone), and 'Azure storage validated' (Yes). The 'Duplicate detection' section is also visible.

**Top Right Screenshot:** Shows the 'Contoso Pharmaceuticals (sample)' account page. The 'Doculitz' option is highlighted in the 'Add to Marketing List' dropdown menu.

**Bottom Left Screenshot:** Shows the 'New Configuration setting' page. The 'Entity details' section is visible, showing a list of entity masters. The 'account' entity master is highlighted in the list.

**Bottom Right Screenshot:** Shows the 'Contoso Pharmaceuticals (sample)' account page. The 'Assistant' section is visible, showing a notification: 'Opportunity closing soon They sell many of the same items that we do - need to follow up (sample)'.

# Upload

SANDBOX

Save

Save & Close

New

Open org chart

harmaceuticals (sample) - Saved

\$60

Ann

Upload document(s)

+ Add files

Start upload

Open

« Windows-SSD (C:) » Doculitz

Search Doculitz

Organize

New folder

Home

Gallery

Amandeep - Agili

Downloads

Music

Videos

Desktop

Screenshots

| Name                              | Date modified     | Type                 |
|-----------------------------------|-------------------|----------------------|
| Contoso Contact 2024-3-3 20-43-28 | 3/7/2024 11:21 PM | Microsoft Excel W... |
| Contoso Contract                  | 4/12/2024 6:05 PM | Microsoft Word D...  |
| Contoso Master Service Agreement  | 4/16/2025 1:01 AM | PDF File             |
| Contoso SMB Sales Bootcamp        | 1/17/2024 8:13 AM | PDF File             |

File name:

All files

Upload from mobile

Open

Cancel

Upload document(s)

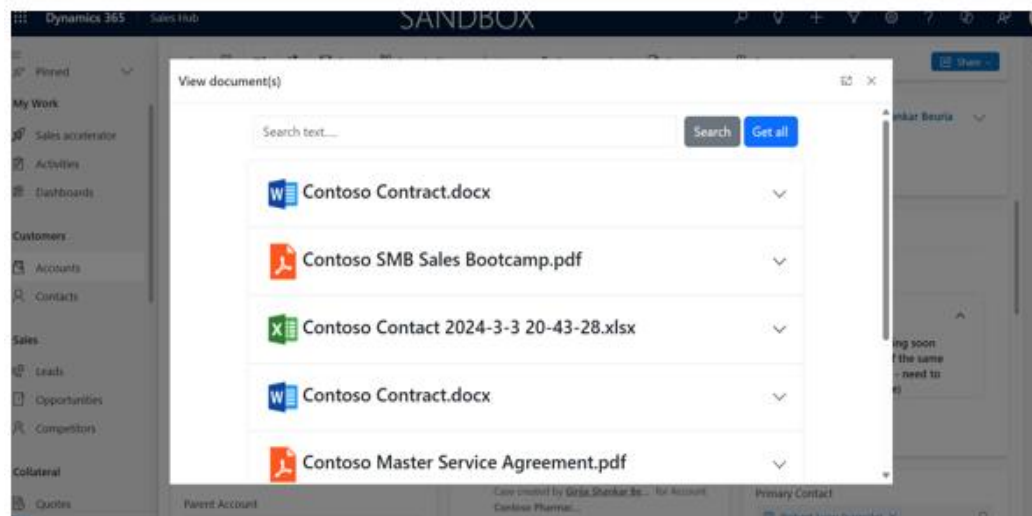
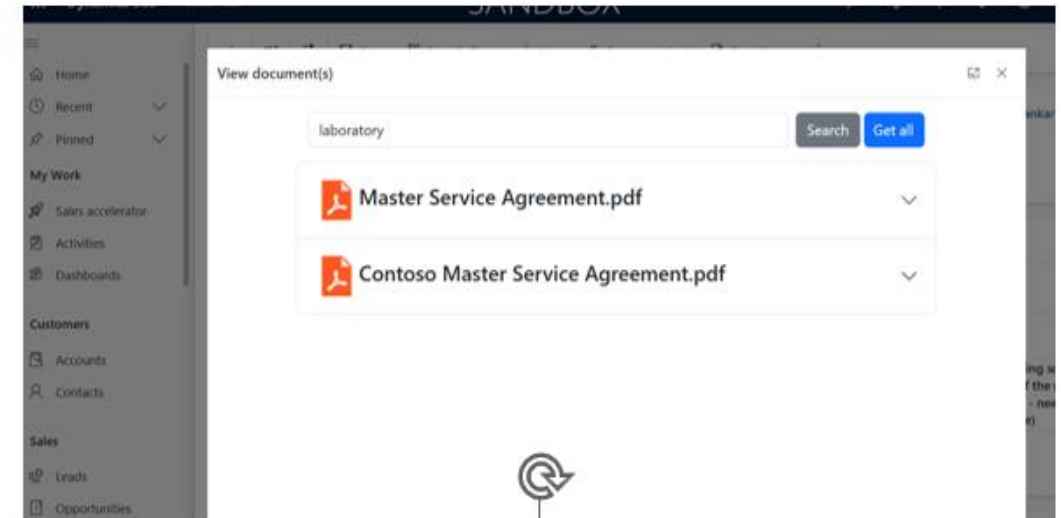
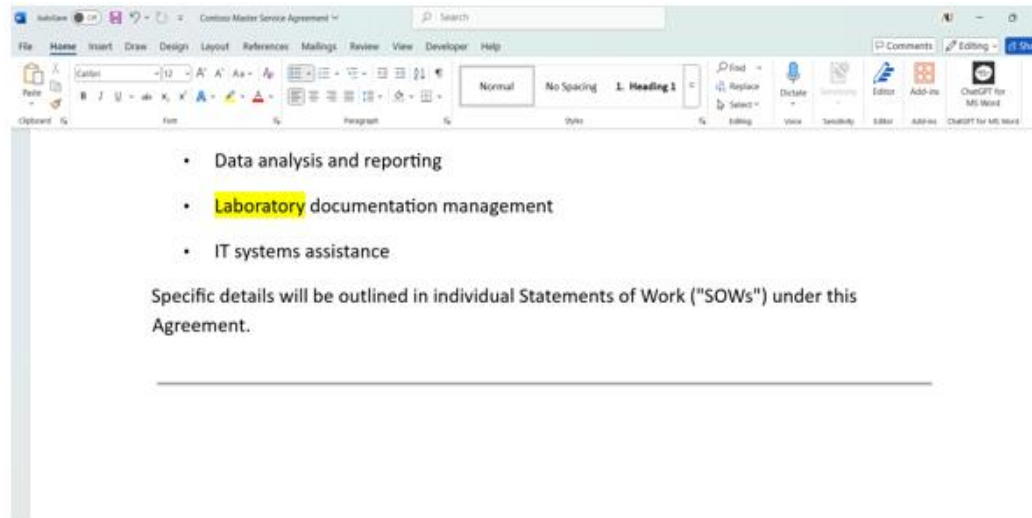
+ Add files

Start upload

Cancel upload

|                                                                                      |                                        |          |                                                  |
|--------------------------------------------------------------------------------------|----------------------------------------|----------|--------------------------------------------------|
|   | Contoso Contact 2024-3-3 20-43-28.xlsx | 22.10 KB | <div>Start upload</div> <div>Cancel upload</div> |
|   | Contoso Contract.docx                  | 36.50 KB | <div>Start upload</div> <div>Cancel upload</div> |
|   | Contoso Master Service Agreement.pdf   | 56.62 KB | <div>Start upload</div> <div>Cancel upload</div> |
|  | Contoso SMB Sales Bootcamp.pdf         | 7.99 MB  | <div>Start upload</div> <div>Cancel upload</div> |

# Preview



# Manage

**Dynamics 365 | Sales Hub**

**SANDBOX**

← ↗ 📄 Save 💾 Save & Close ➕ New 👤 Open org chart 🚫 Deactivate 🔗 Connect ⌵ ⋮ ➦ Share

**Contoso Pharmaceuticals**  
Account · Account

**Summary** Details Accounts & Products

**ACCOUNT INFORMATION**

Account Name \*  
Contoso Pharmaceuticals

Phone  
555-0156

Fax  
---

Website  
<http://www.contoso.com/>

Parent Account  
---

11/12/2024, 2:04 PM  
Case created by [Girija Shankar Beuria](#) for Account Contoso Pharmac...

Auto-post on Opportunity They sell many of the same items that we do - need to follow up (sample)

**Manage document(s)**

|                                                                                    |                                               |                          |                                                                                      |
|------------------------------------------------------------------------------------|-----------------------------------------------|--------------------------|--------------------------------------------------------------------------------------|
|   | <b>Contoso Contact 2024-3-3 20-43-28.xlsx</b> | 22 min(s)<br>ago 22 KB   |   |
|   | <b>Contoso Master Service Agreement.pdf</b>   | 22 min(s)<br>ago 57 KB   |   |
|   | <b>Contoso SMB Sales Bootcamp.pdf</b>         | 22 min(s)<br>ago 7994 KB |   |
|  | <b>Customer success story.xlsx</b>            | 36 min(s)<br>ago 11 KB   |  |

**Assistant**

**Notifications**

🔔 1 reminder ^

📅 Opportunity's close date has passed  
They sell many of the same items that we do - need to follow up (sample)

**Primary Contact**  
[Robert Lyon \(sample\)](#) x

**Customers**

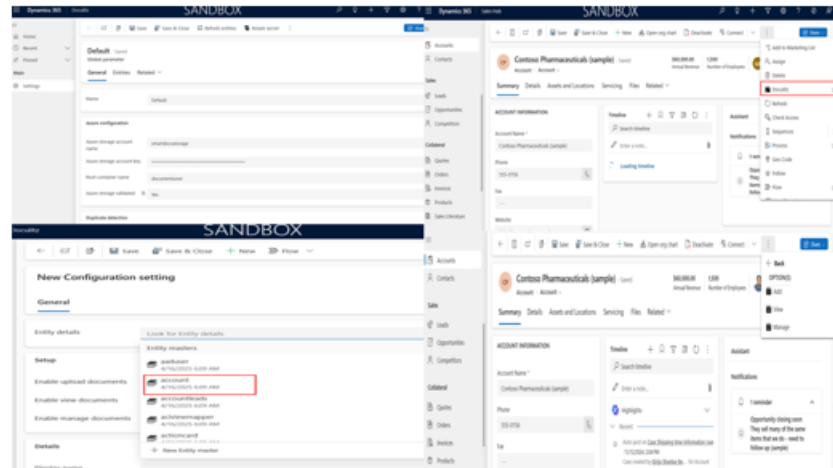
- Accounts
- Contacts

**Sales**

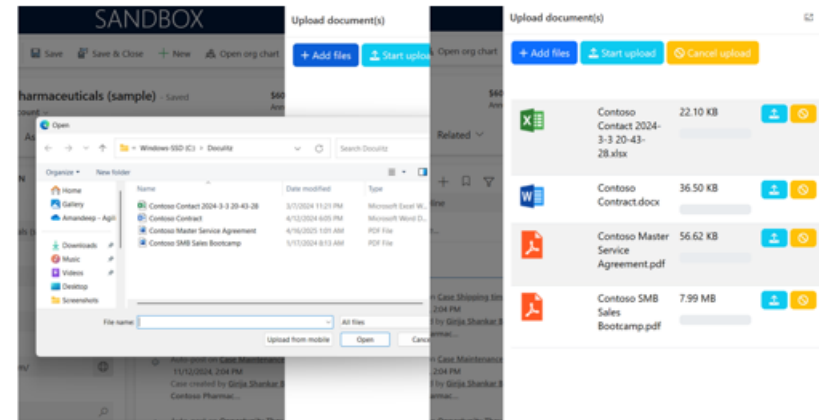
- Leads
- Opportunities
- Competitors

**Sales**

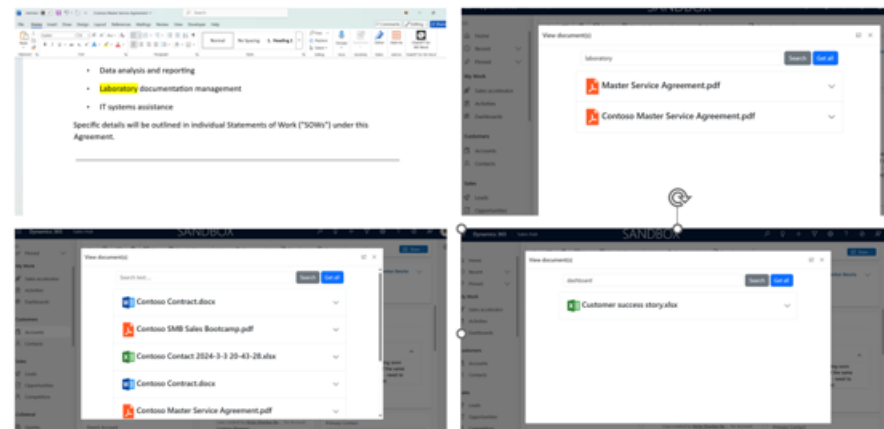
## Setup



## Upload



## Preview



## Manage

