



Introduction



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.

It empowers users with drag-and-drop uploads, version control, and document previews directly within record forms, enhancing productivity and collaboration. AI-driven metadata tagging and context-aware suggestions make document organization effortless, while robust role-based access control ensures compliance and data security. Whether you're managing proposals, contracts, or internal documentation, Doculitz streamlines every step of the document lifecycle — all from within your Dynamics 365 environment.

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.

Use Cases by Entity:

- **Accounts:** Maintain company documents like MSAs, contracts, and compliance files in one secure, searchable location.



- **Contacts:** Attach communication records, signed agreements, or onboarding docs to individual contacts for full visibility.
- **Quotes/Orders:** Include signed quotes, purchase orders, and receipts for complete sales documentation at every stage.
- **Regulatory Documents:** Upload licenses, compliance certificates, and audit reports linked to accounts or contracts.
- **Signed Agreements:** Attach scanned contracts or digital signature files to opportunity or quote records.
- **Invoices & Payment Proofs:** Store invoice PDFs, receipts, and transaction confirmations directly under the order or account.

Post Installation Steps:

Enter valid Azure configuration credentials including the Azure Search service URL and key, as well as the Azure Storage account key. Additionally, both **Azure Storage Validation** and **Azure Document Search** must be enabled to allow proper indexing and retrieval of documents.

Azure Configuration Setup:

The screenshot shows the Dynamics 365 DocuLitz 'SANDBOX' interface. On the left is a navigation pane with 'Home', 'Recent', 'Pinned', 'Main', and 'Settings'. The 'Settings' option is selected. The main area displays the 'Default' global parameter configuration. The 'Azure configuration' section is highlighted with a red box and contains the following fields:

Azure storage account name	smart
Azure storage account key	qvj5c
Root container name	documentsone
Azure storage validated	☒ Yes

At the bottom of the configuration section is a 'Duplicate detection' checkbox.



Azure Document Search Setup:

Default - Saved
Global parameter

Azure Document Search

Enable Document Search	Yes
Azure Search Service Url	https://...
Azure Search Service Key	Qs81...
Azure Search Service Index name	mainindex
Use Full Query type for search	No
Use global scoring statistics for search	No
Use All search mode for search	No

Setup

Maximum upload documents count	5
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Additional Parameters:

Default - Saved
Global parameter

General

Azure Search Service Url	https://smartdocumentsearchservice.search.windows.net
Azure Search Service Key	*****
Azure Search Service Index name	mainindex
Use Full Query type for search	No
Use global scoring statistics for search	No
Use All search mode for search	No

✓ No
Yes

All the above options are set to "No" by default, and we recommend keeping them as-is for most standard use cases. If your scenario demands advanced search behaviour, you may consider switching to "Yes" as explained below.



1. **Use Full Query Type for Search-** This refers to the `queryType` parameter and supports advanced search capabilities like Boolean operators, field-scoped queries, fuzzy search, wildcard search, etc.

If set to: -

- Yes: When you need advanced search features like filtering by fields, Boolean logic, fuzzy or wildcard searches.
- No: For general keyword-based search where users just type in simple terms.

Recommendation: Keep as **No** unless you need advanced Lucene-style search (e.g., Boolean operators, field-specific queries).

2. **Use Global Scoring Statistics for Search-** This refers to the `scoringStatistics` parameter and uses scoring statistics computed from the entire index, which helps in scoring consistency across searches.

If set to: -

- Yes: When consistent scoring across the entire index is important — especially in apps with pagination or faceted navigation.
- No: When working with filtered data or small result sets and scoring relevance based only on that local set is fine.

Recommendation: Keep as **No** for local scoring based on filtered results.

3. **Use All search mode for search-** This refers to the `searchMode` parameter.

- Yes: all matches documents that contain all the search terms.
- No: any (default) matches documents that contain any of the search terms.

Recommendation: Keep as **No** to allow broader results matching any search term.



Prerequisites:

- User Permissions/Roles: Ensure you have the necessary roles (System Administrator, Doculitz Viewer) with access to the Doculitz Hub.
 - Doculitz Administrator: User who needs to administrator Doculitz.
 - Doculitz Viewer: Users who only need to use the Doculitz.

Ensure that the Doculitz utility is installed, and all post-installation steps are completed before proceeding with the configuration.

The image displays two side-by-side screenshots of the Doculitz configuration interface. The left screenshot shows the 'Azure configuration' section, which includes fields for 'Azure storage account name', 'Azure storage account key', 'Root container name', and 'Azure storage validated'. The right screenshot shows the 'Azure Document Search' section, which includes fields for 'Enable Document Search', 'Azure Search Service Url', 'Azure Search Service Key', and 'Azure Search Service Index name'. Both sections are highlighted with red boxes.

Click on **validate Azure Storage** configuration & **save**.

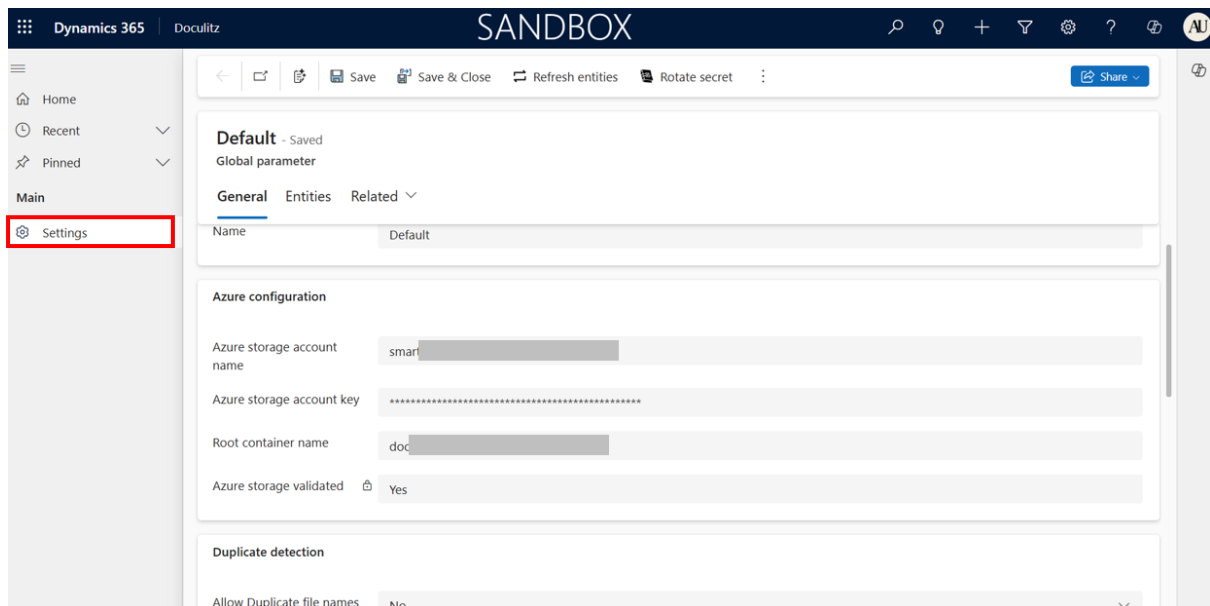
The image shows a screenshot of the Doculitz configuration interface. The 'Validate Azure storage' button is highlighted with a red box. The interface includes a sidebar with navigation options like 'Home', 'Recent', 'Pinned', 'Main', and 'Settings'. The main content area displays the 'Azure Document Search' configuration, including fields for 'Enable Document Search', 'Azure Search Service Url', 'Azure Search Service Key', and 'Azure Search Service Index name'. Below this, the 'Setup' section includes fields for 'Maximum upload documents count' and 'Maximum document size upload (MB)'.



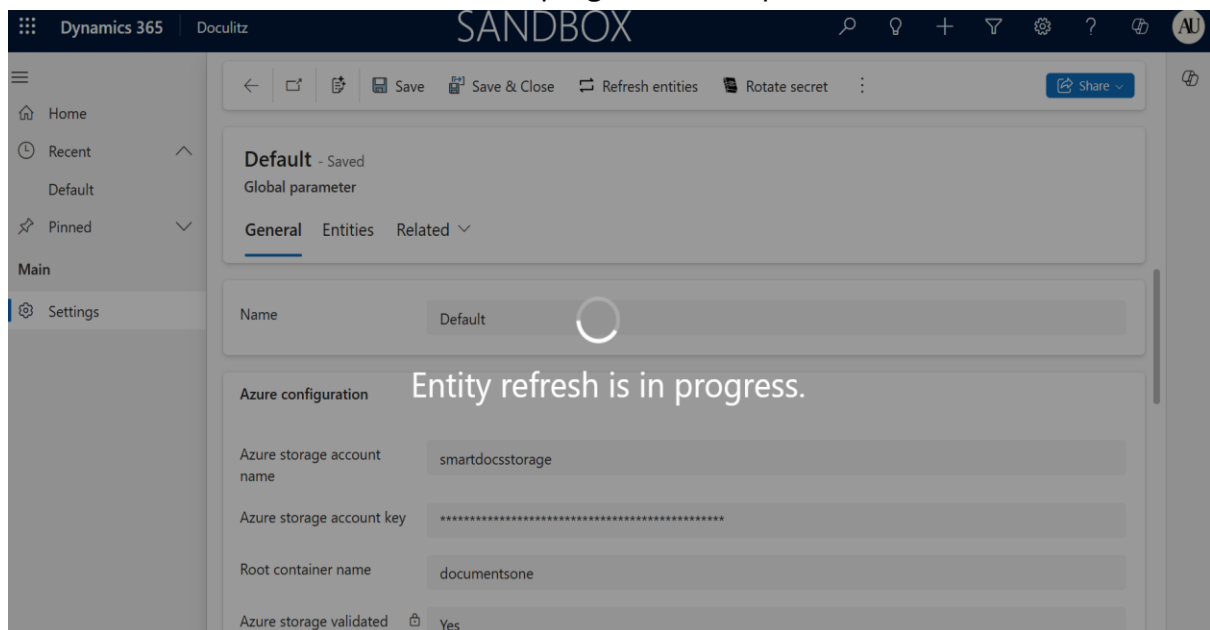
Initial Setups

Refresh Entities

In the Doculitz app, **click 'Settings'** to access the settings page, where you can customize the default preferences.

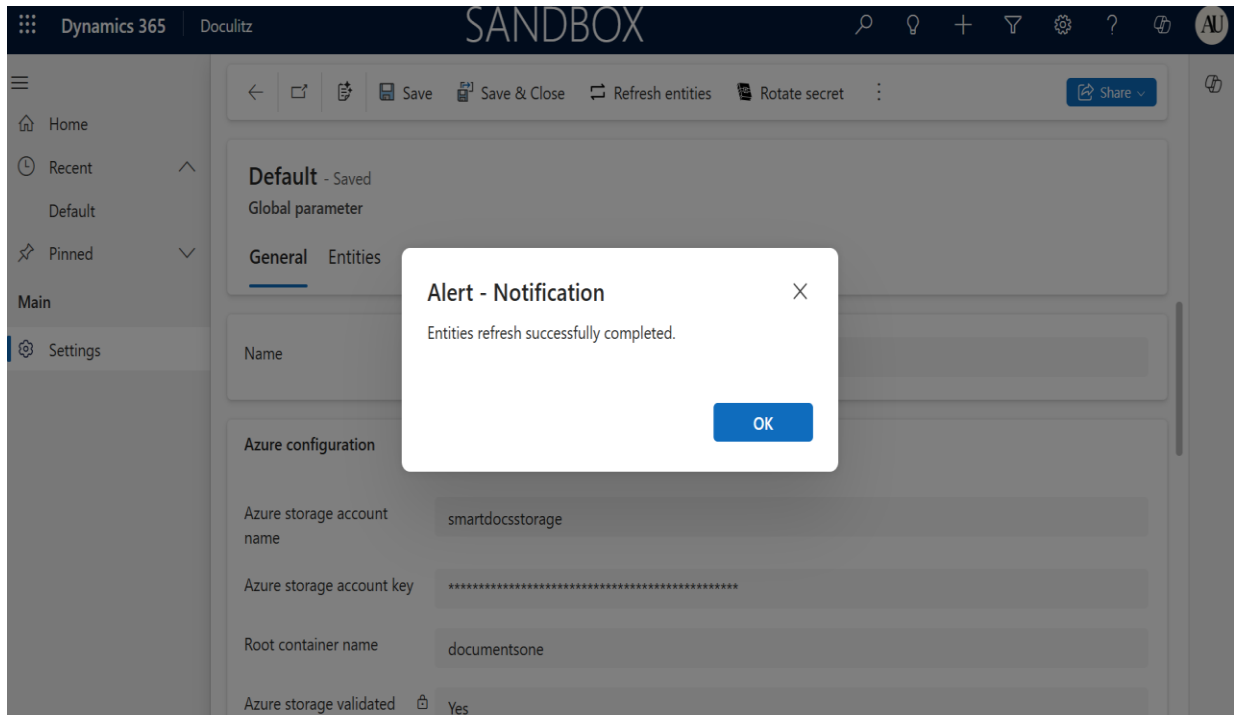


Click 'Refresh Entities' and wait for the progress to complete.



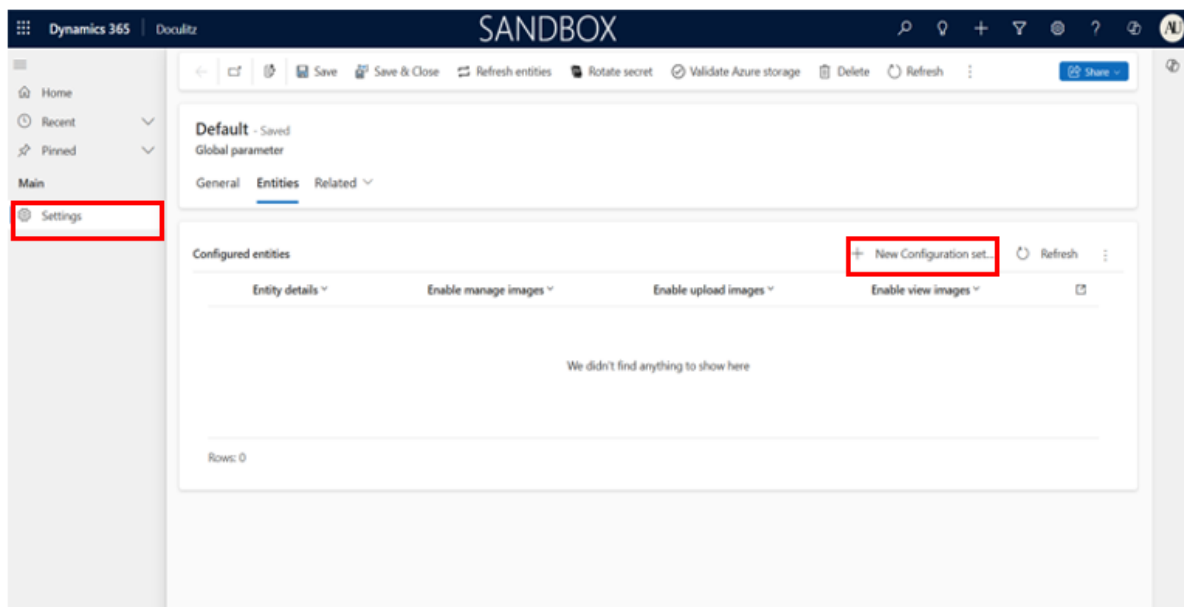


Refresh Successful.



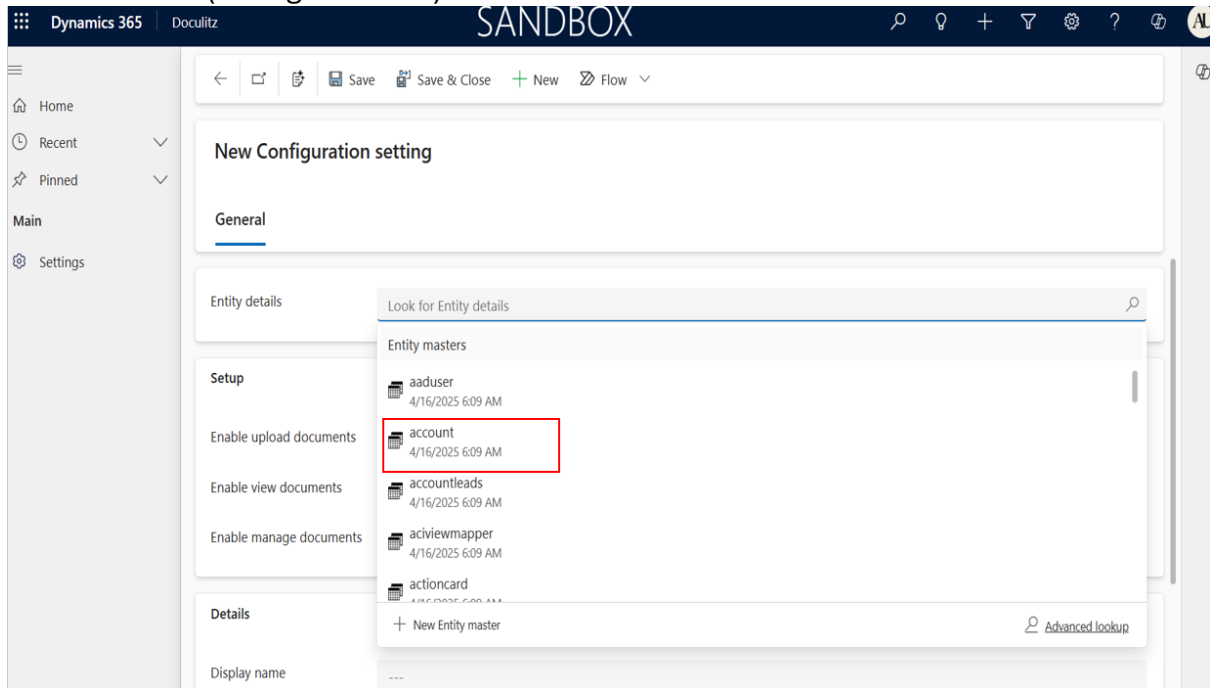
Configuration Setup:

1. Navigate to **Settings** and select **Entities**. Then, click on **+ New Configuration Settings** to begin the configuration process.



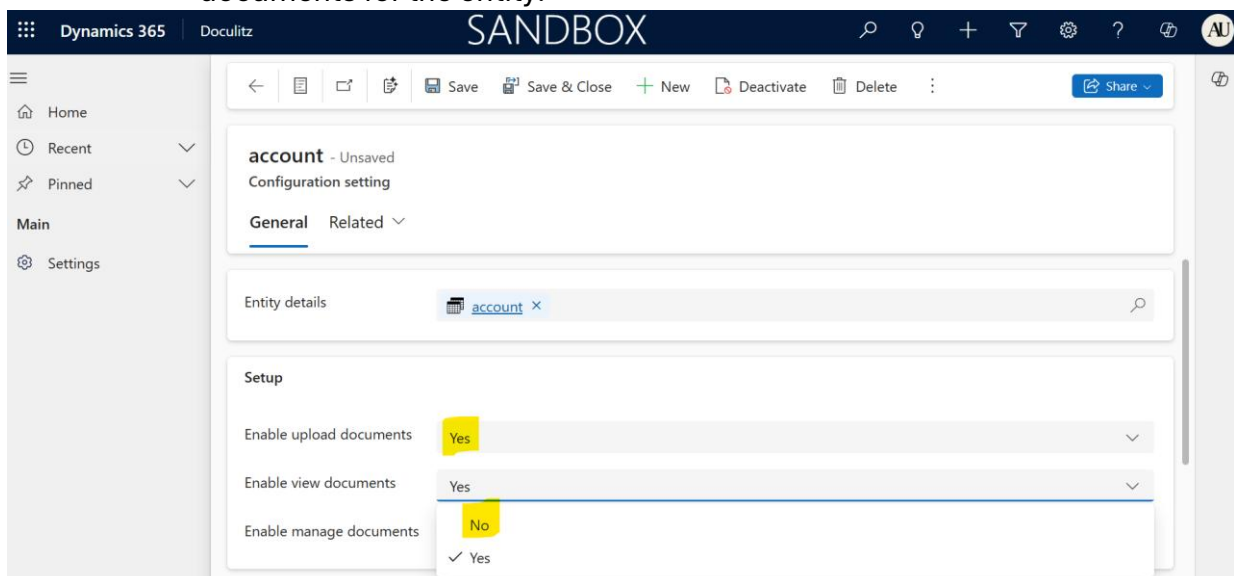


2. On the new configuration settings, In the entity details, **search for the entity** to be enabled (for e.g. Account).



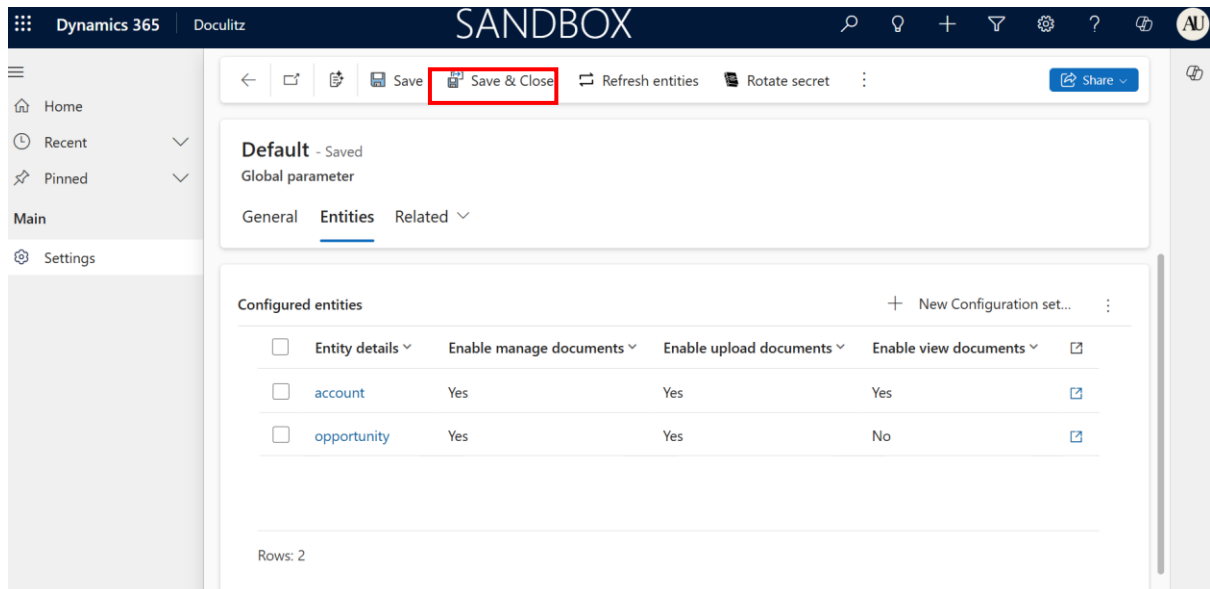
The additional settings can be done and are as follows:

- **Enable upload documents:** This option enables uploading of documents for the entity.
- **Enable view documents:** This option enables viewing of documents for the entity.
- **Enable manage documents:** This option enables management of documents for the entity.



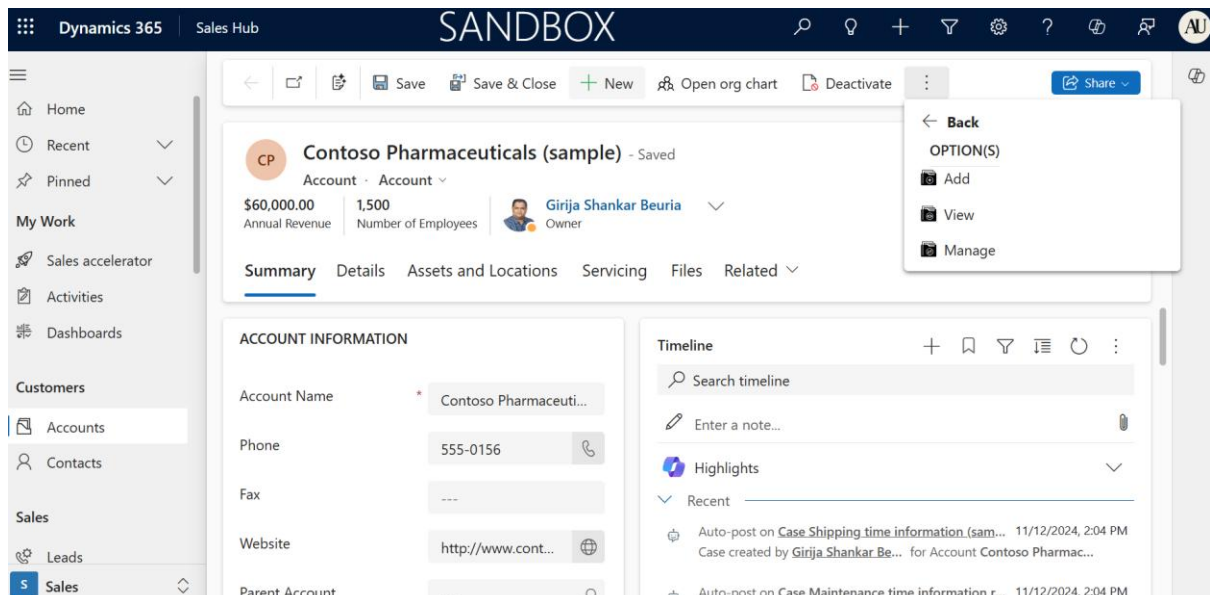


3. Save & Close.



Usage

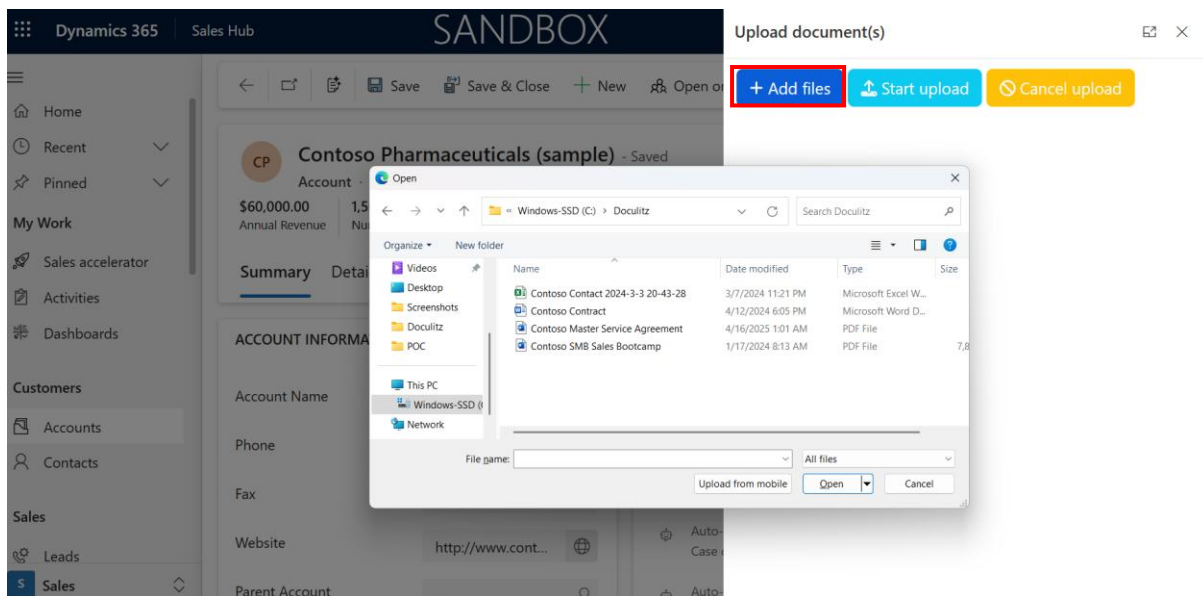
The Doculitz feature should now be accessible on the **Account** entity page.



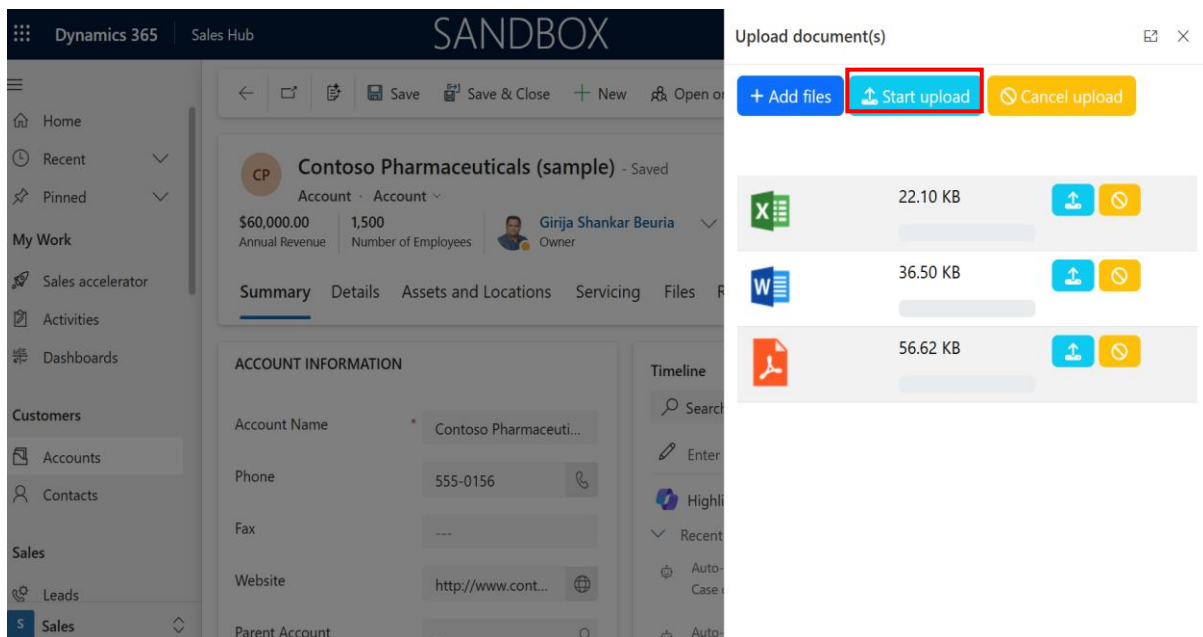


Upload Documents

Click on **"Add file"** to browse and select documents or simply drag and drop to upload them.

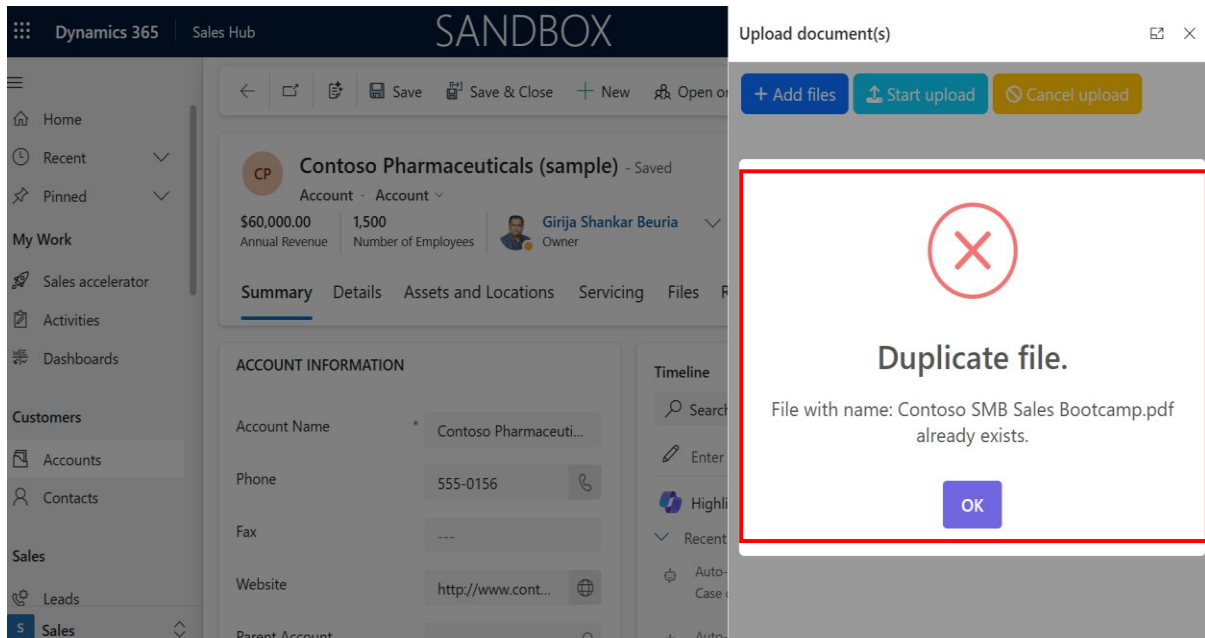


select individual documents and click on **"Start Upload"** to upload multiple documents at once.



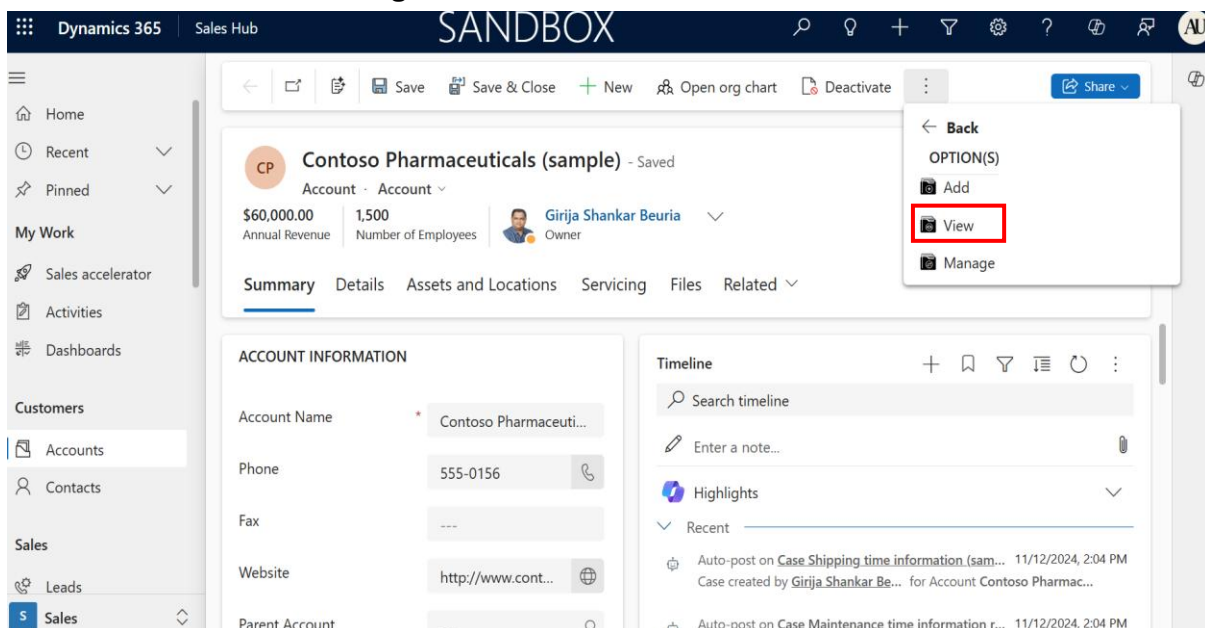


Prevents redundant uploads by identifying and restricting duplicate documents for better data accuracy.



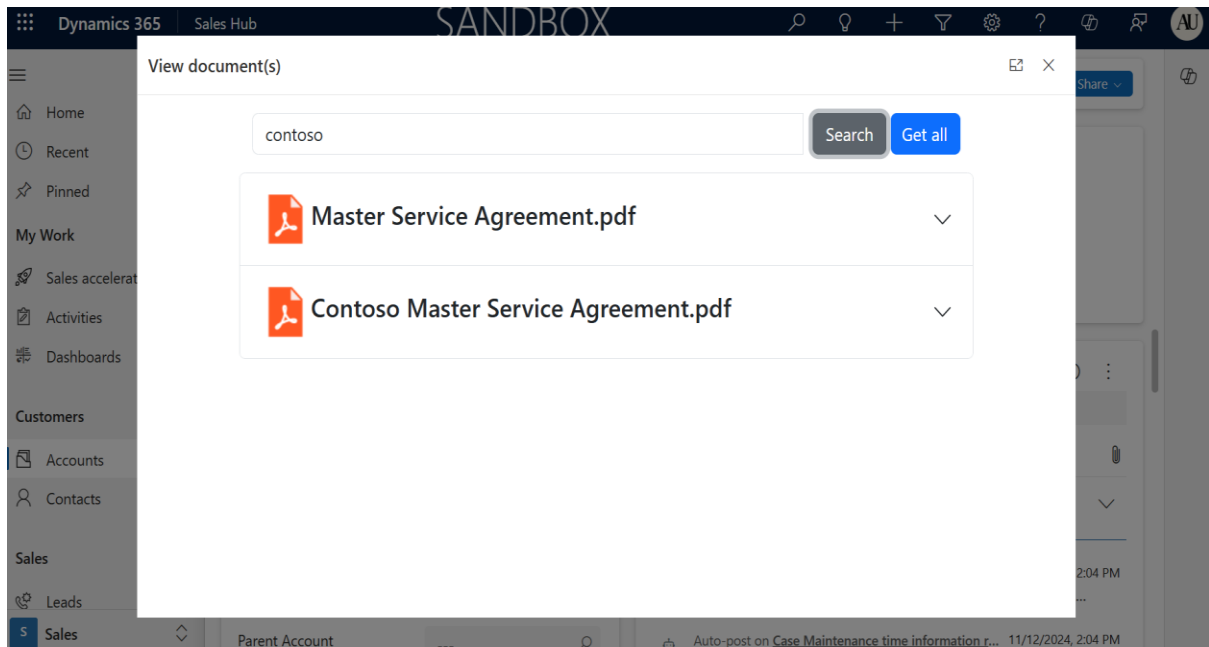
Preview Documents

Click on **view** to start viewing the available documents.



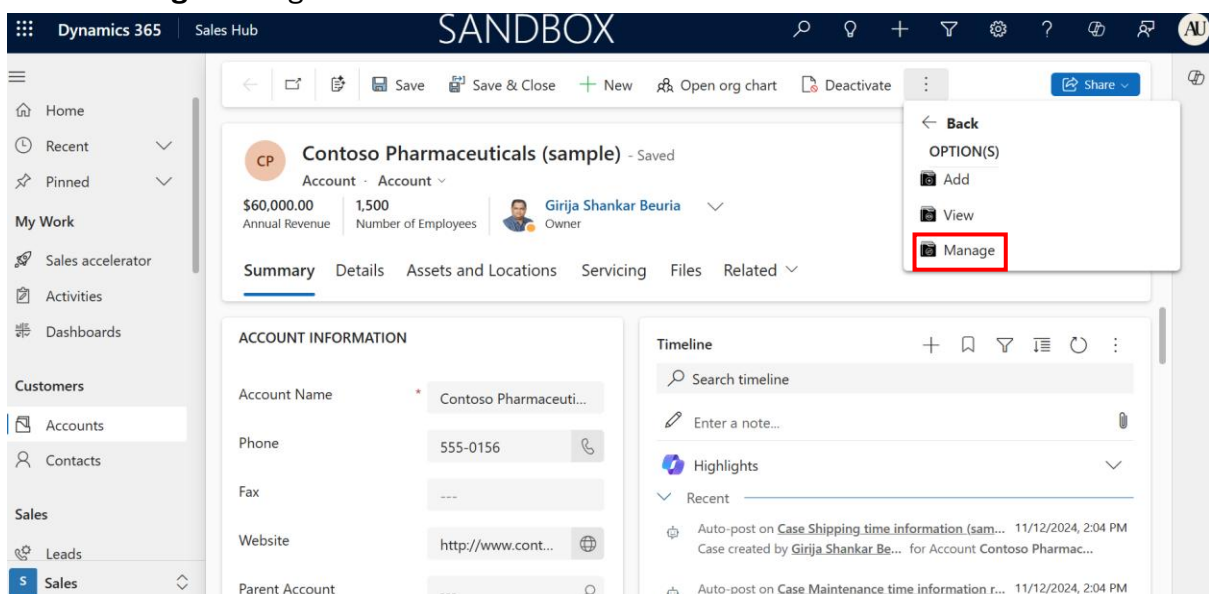


Search and view documents or click 'Get All' to display all available documents.



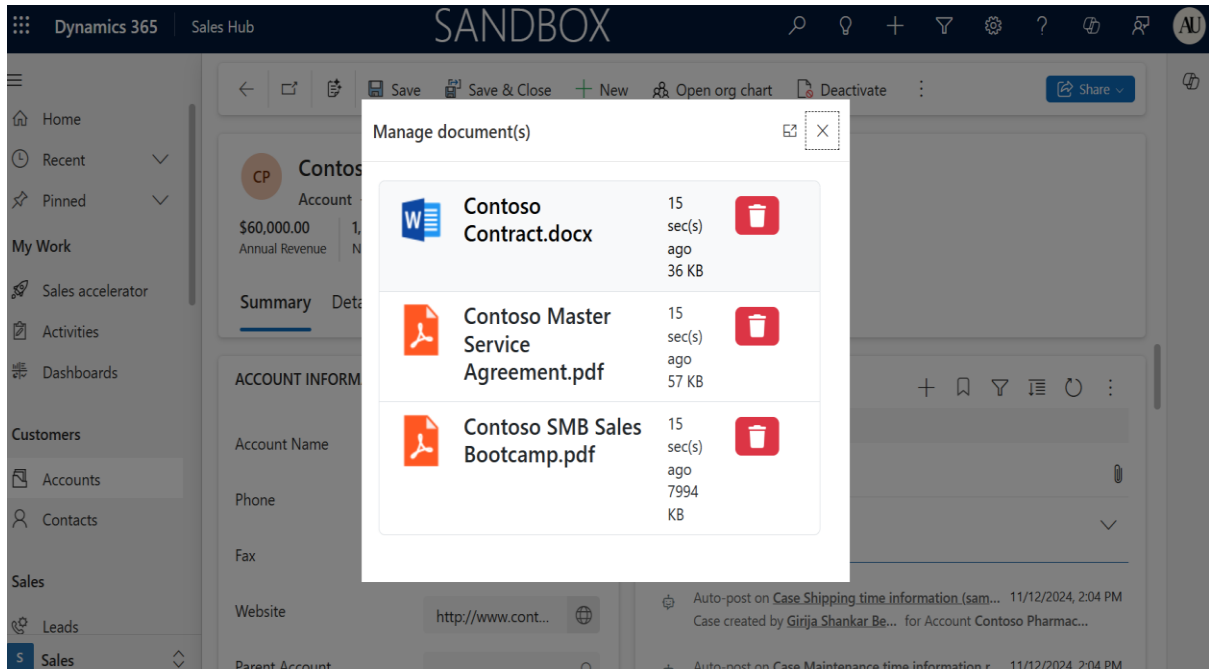
Manage Documents

Click 'Manage' to organize and edit documents.





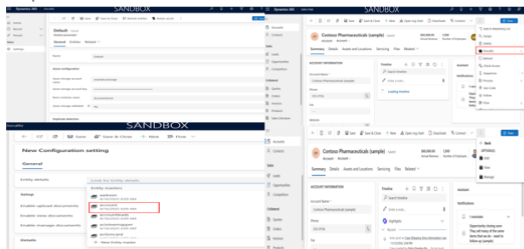
Organize, update, and securely delete documents based on your evolving business needs



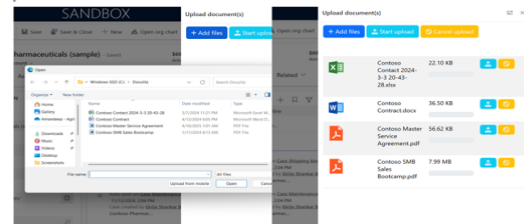
Conclusion

Doculitz transforms document management in Dynamics 365 CE by combining the power of Azure AI with seamless, native integration. It simplifies the way you upload, organize, and retrieve documents, offering smart features like AI-powered tagging, advanced search capabilities, and built-in duplicate detection. Streamline your workflow, improve collaboration, and boost efficiency — experience smarter document management with **Doculitz** today.

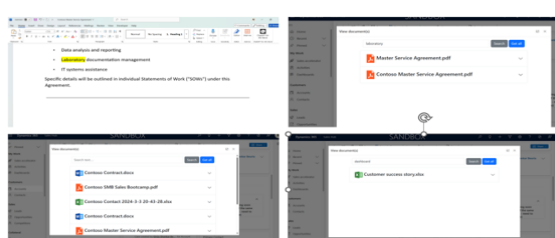
Setup



Upload



Preview



Manage

