

Document Expert for Microsoft Dynamics 365 Business Central



Capture. Validate. Process. Inbound documents—directly in Business Central.

Still typing document data manually?

Do you receive invoices, order confirmations, delivery notes, or sales documents via email, paper, or mobile photos?
Are you using Business Central and want a faster way to turn inbound documents into reliable business records?
Do you need a simple, modern document intake—without switching tools or copying data between systems?

Document Expert is a fully integrated Business Central app that helps you capture inbound documents, create **Incoming Documents**, and support downstream processing in the **Purchase** and **Sales** modules—quickly and consistently.

Order Today

Getting started is straightforward: install the extension in Business Central, open the setup, and start capturing documents immediately, no complex rollout required.

Capture Documents the Way You Work

Document Expert supports multiple intake channels so users can work with what they already have:



- **Upload (Drag & Drop):** Drop PDF/image files into Business Central
- **E-mail (Drag & Drop):** Drag attachments from your mail client into Document Expert
- **Camera:** Capture documents on the go (mobile/tablet)
- **Email Inbox:** Use a monitored inbox for automated, centralized intake

Key Benefits



- **Less manual work:** Reduce repetitive document handling and copy/paste effort
- **Fewer errors:** Improve data consistency through structured validation steps
- **Better transparency:** Centralize inbound documents and track status in Business Central
- **Faster processing:** Shorten turnaround time from “received” to “actionable”
- **One system:** Work inside Business Central—no tool hopping

Business Central Objects Supported

Document Expert is designed to fit naturally into Business Central:



- **Incoming Document** (core object for captured files and tracking)
- **Purchase module** support (e.g., AP/finance and purchasing workflows)
- **Sales module** support (e.g., sales administration and related documents)
- **Contact** support (e.g., visitcards, email signatures, extract addresses)

(Exact processing steps depend on your Business Central setup and your internal process design.)

Suitable for small businesses and large organizations

Document Expert is ideal for:



- **Finance / Accounts Payable** teams handling inbound invoices
- **Purchasing** teams working with supplier documents
- **Sales administration** receiving customer documents and requests
- **Back office / shared services** needing standardized intake across departments

Security & Control

Document Expert operates under your Business Central environment and permission model:



- Role-based access and user permissions
- Document tracking and accountability via Business Central records
- Centralized intake (especially with Email Inbox) to reduce uncontrolled document handling
(Avoid including credentials or secrets in any documentation or screenshots.)

Flexible & Device-Independent

Work where it makes sense:



- Desktop in Business Central
- Mobile/tablet capture via **Camera**
- Email-based intake for distributed teams and shared mailboxes

Support When You Need It



Document Expert is designed to be easy to adopt. For onboarding, configuration help, and best-practice workflows, professional support can be provided via email, remote session, or on-site—depending on your service model.

Contact: support@idynamics.ch | www.idynamics.ch

Document Expert

100% Business Central integrated.

Faster document intake. Better process quality. Full transparency.