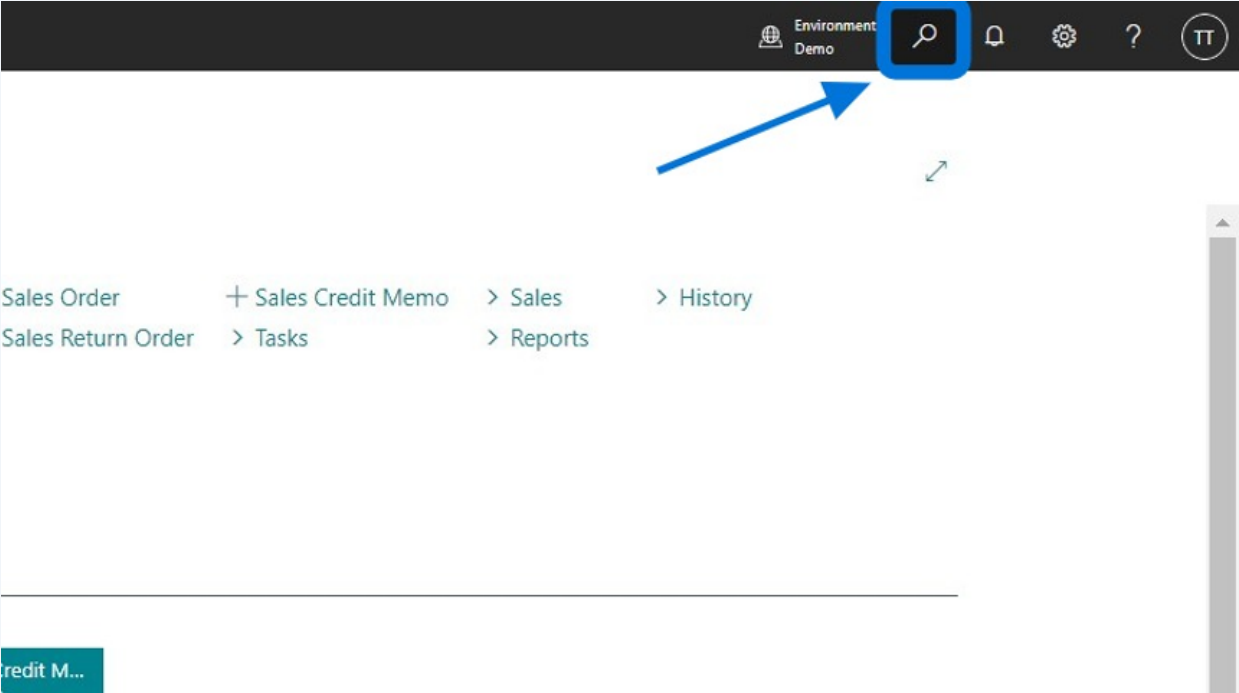


Locate the Installer

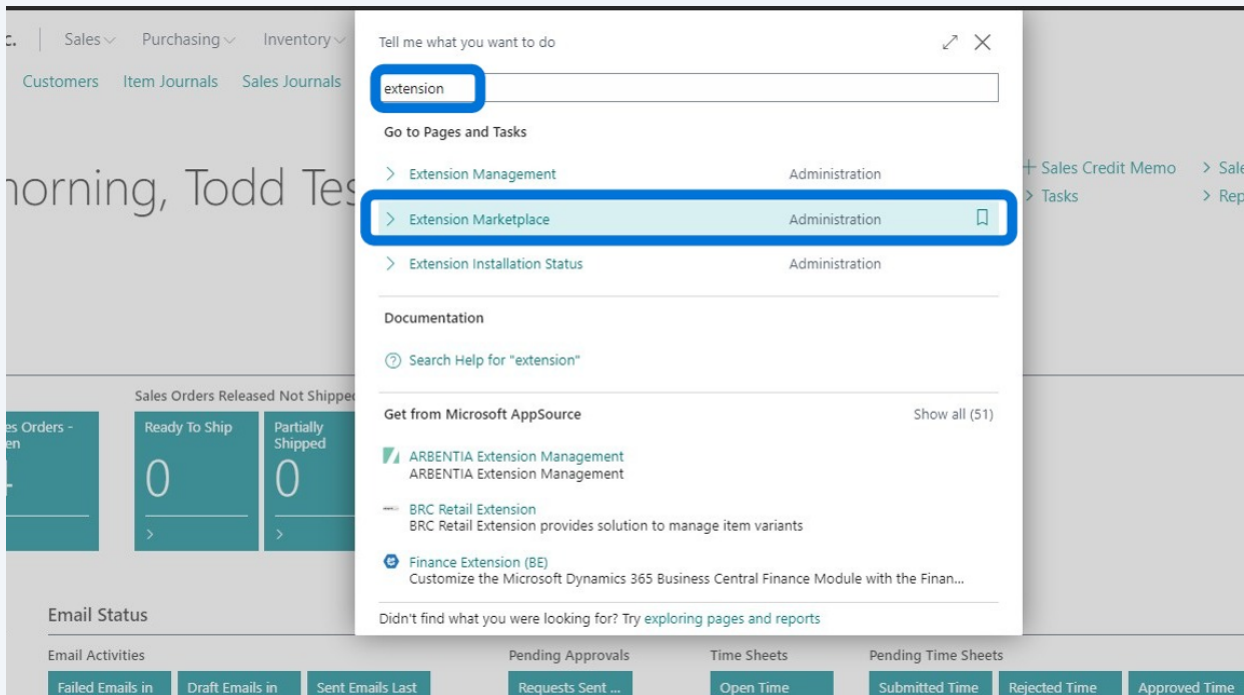
1 To locate the Infotech Document Management App, navigate to <https://businesscentral.dynamics.com/>

2 Click the "Search..." magnifier icon to open Business Central's search page.



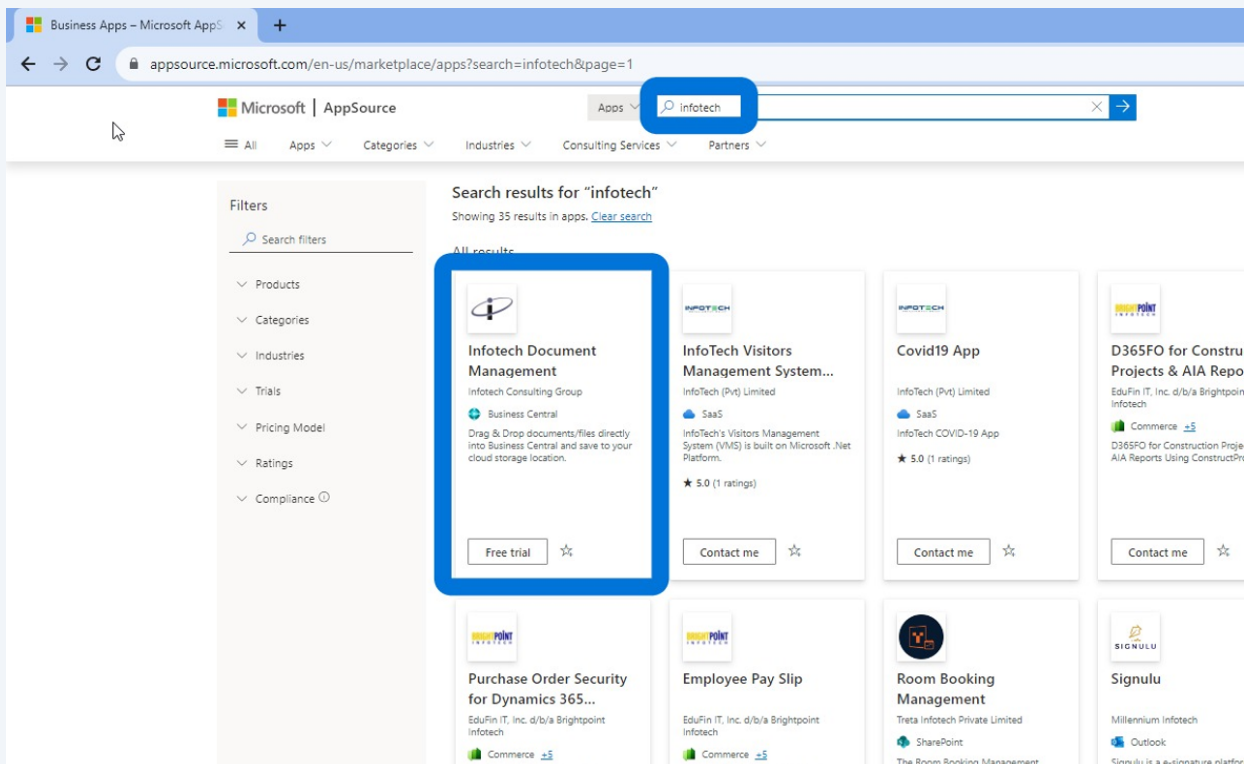
3

Type "Extension" and select Extension Marketplace which opens AppSource which is an online marketplace where you can find add-ons which you can use to customize and extend your experience within Microsoft Applications, such like Microsoft Dynamics 365 Business Central.



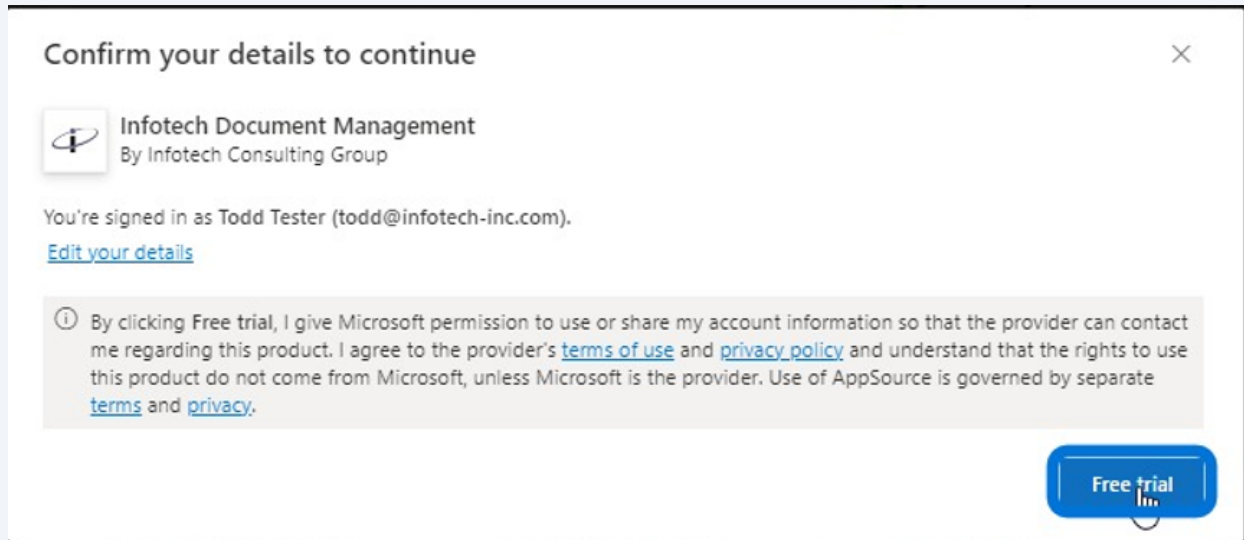
4

Within AppSource, click in the "Search..." field. Type "Infotech" then click on the magnifying glass to search. Select Infotech Document Management "Free Trial" to kick off the installation wizard.



5

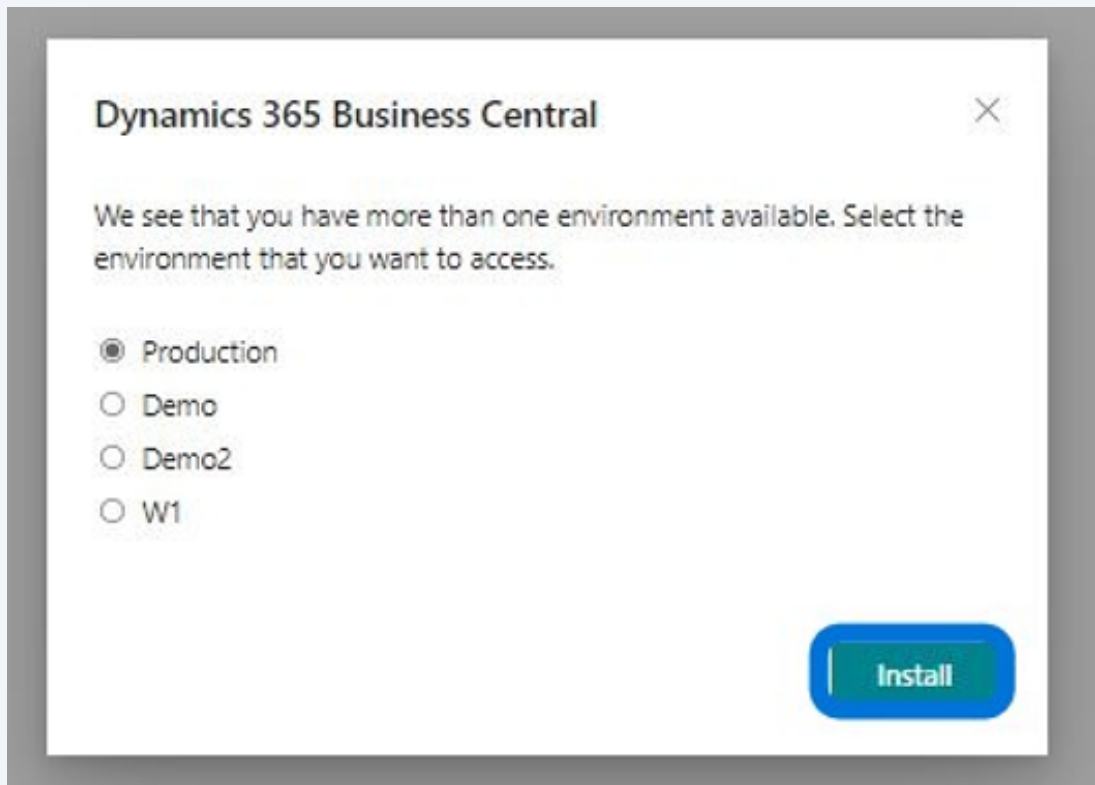
Confirm your details. Then select "Free trial". For any Microsoft AppSource app, confirmation of your information is needed. Once entered, click on "Free trial" again to open Business Central and the Infotech Document Management installation wizard. (NOTE: Your demo license will be valid for 30 days.)



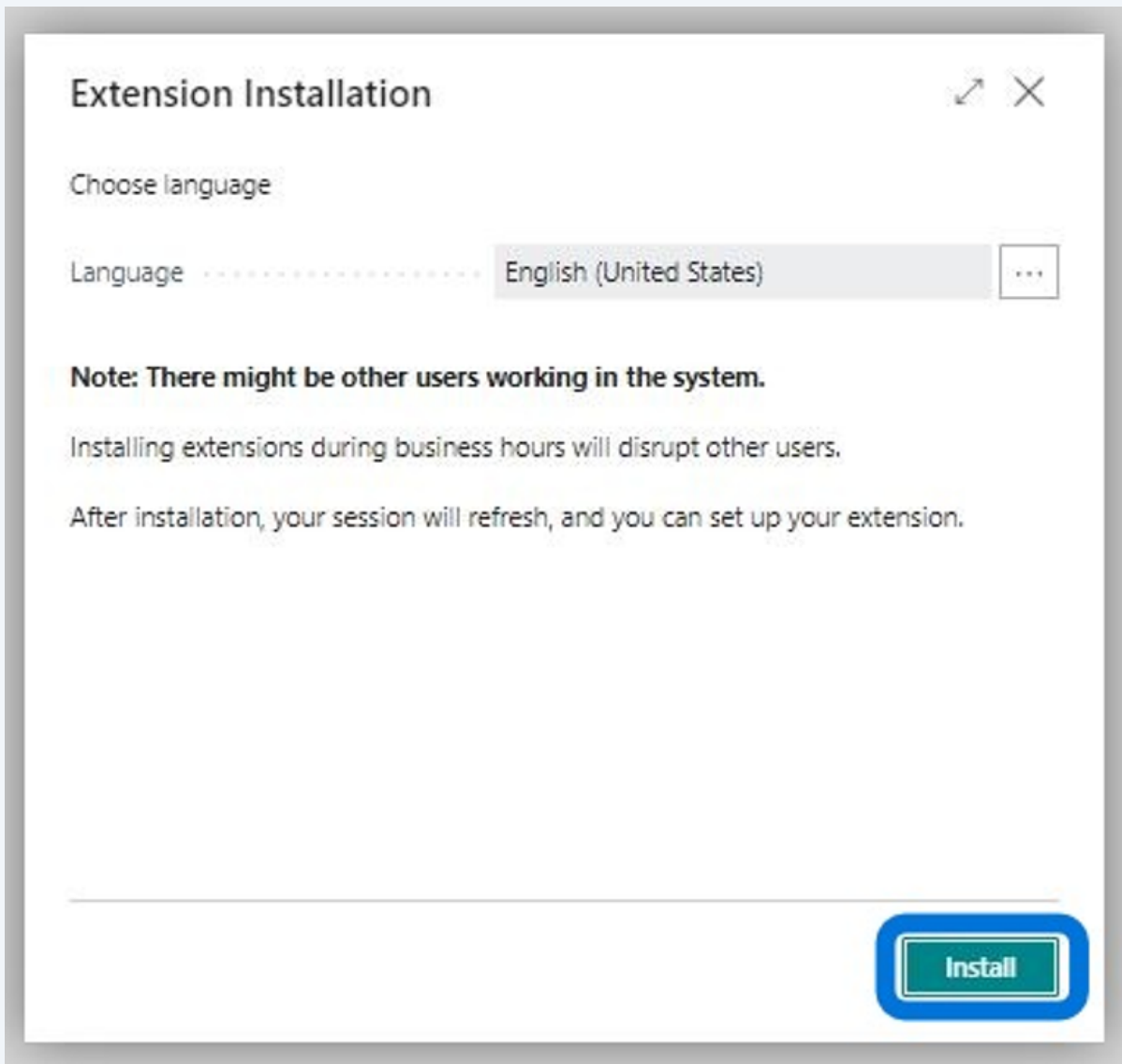
Installation Wizard

6

Select the environment you want Infotech Document Management extension installed in and then click "Install".

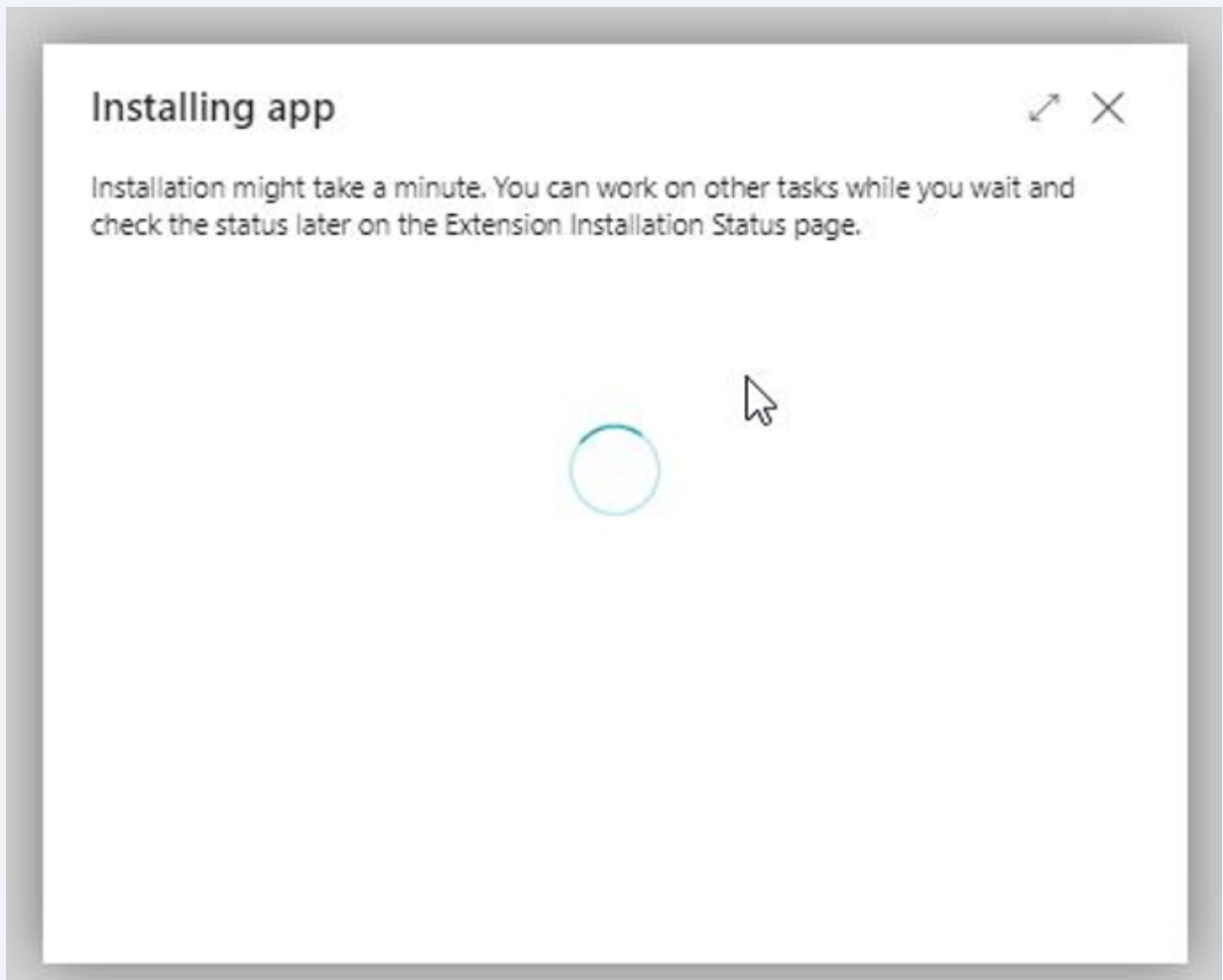


7 Choose the Language, then click "Install".



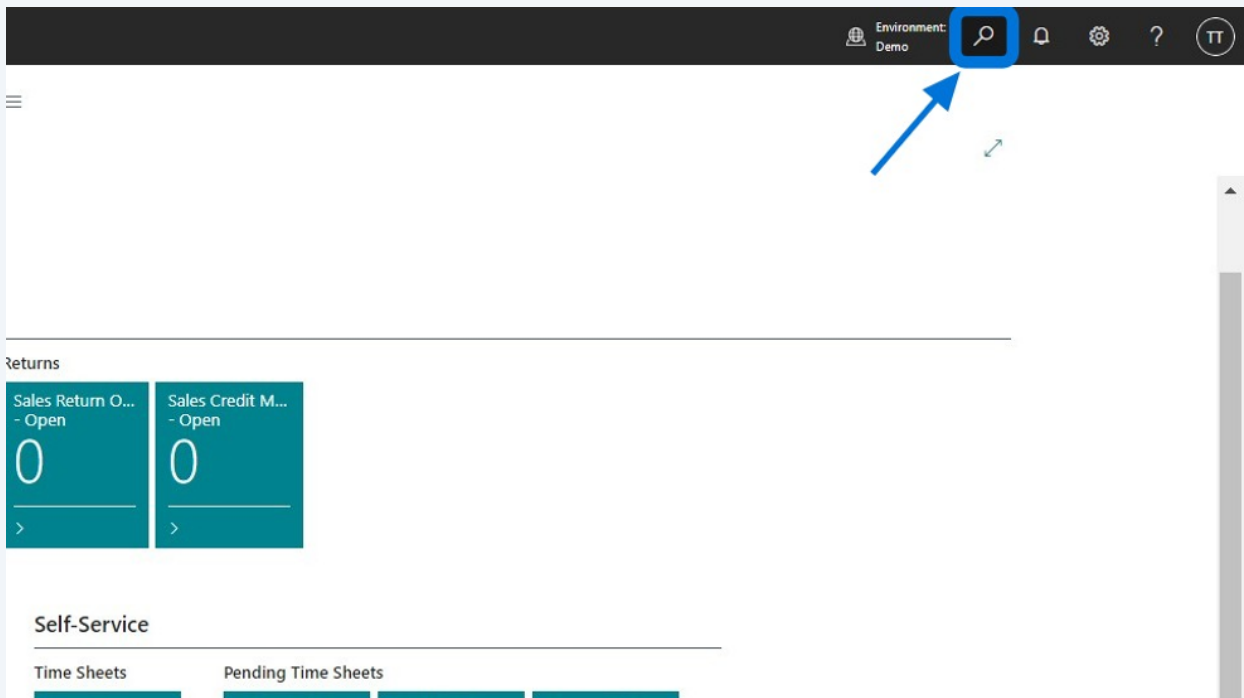
8

The following screen will appear showing the progress of the install. Once install finishes, a Installation complete message will appear.



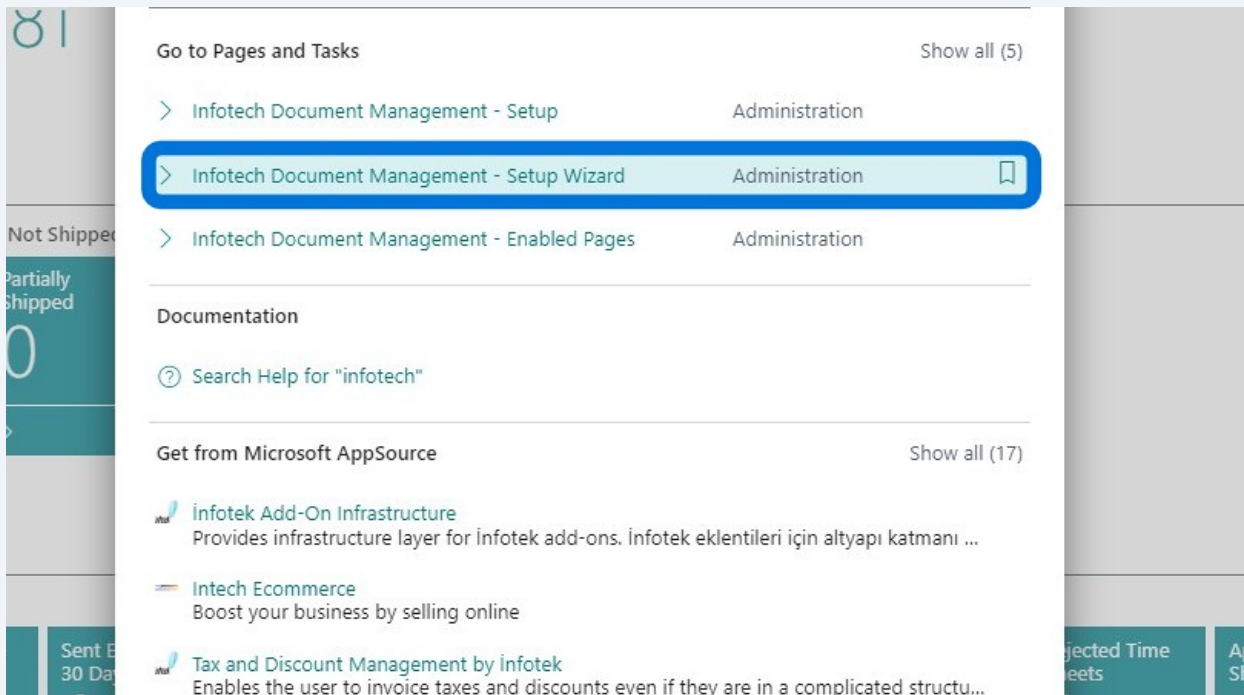
9

To confirm it has been installed, click "Search..." magnifier icon and start typing Infotech.

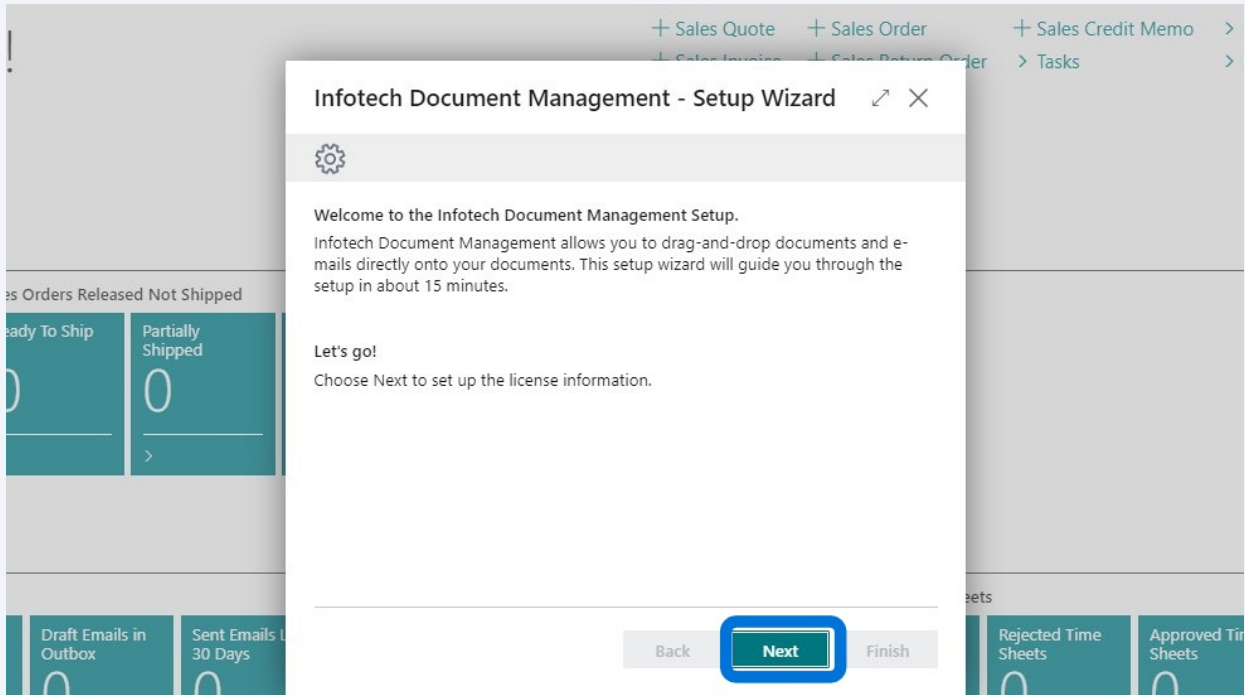


10

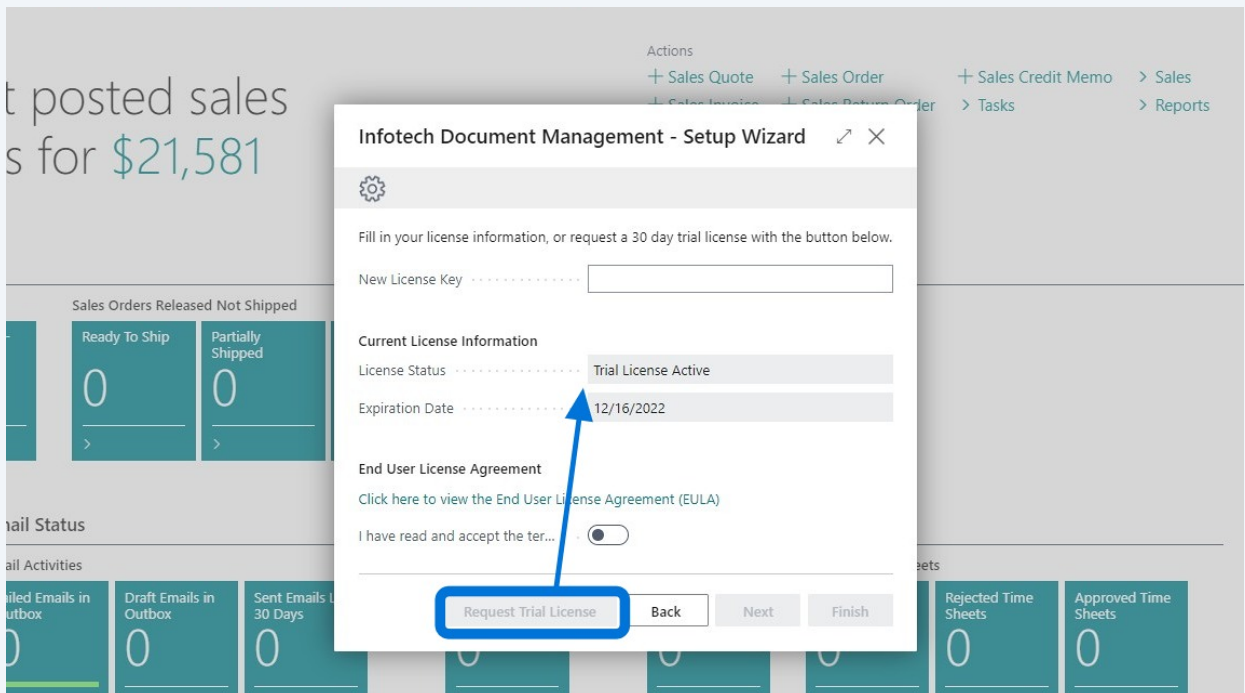
You should see three Infotech options. Select "Infotech Document Management - Setup Wizard".



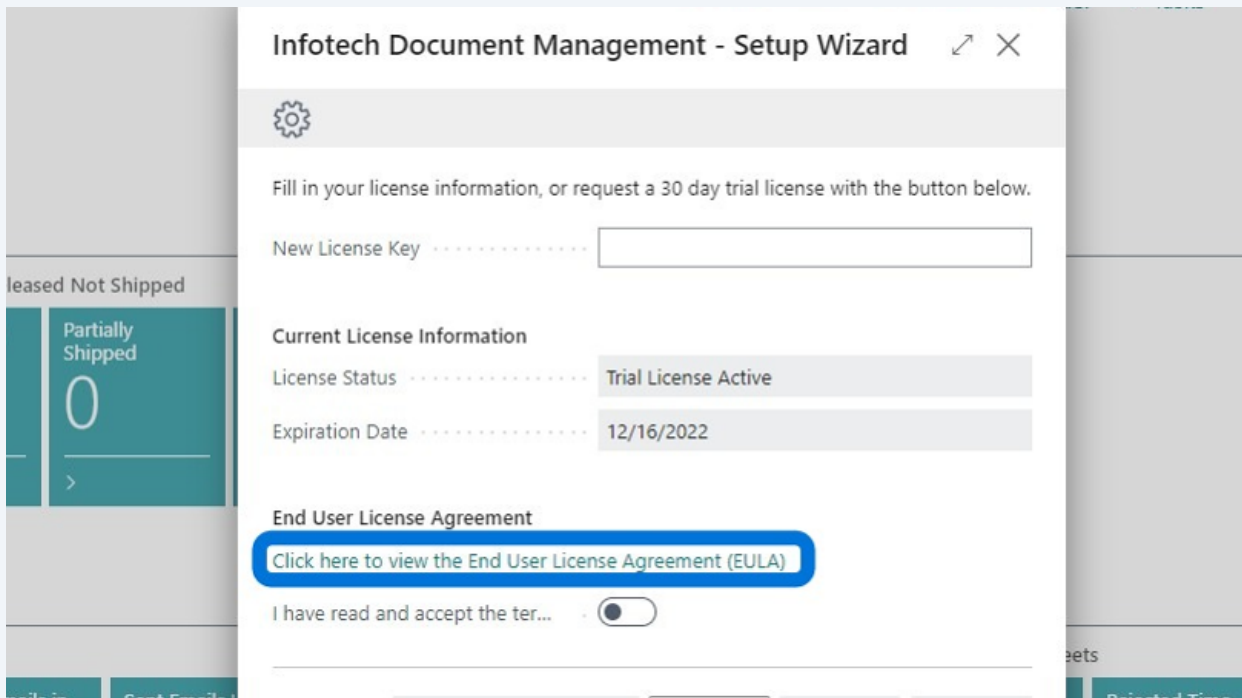
11 Click "Next"



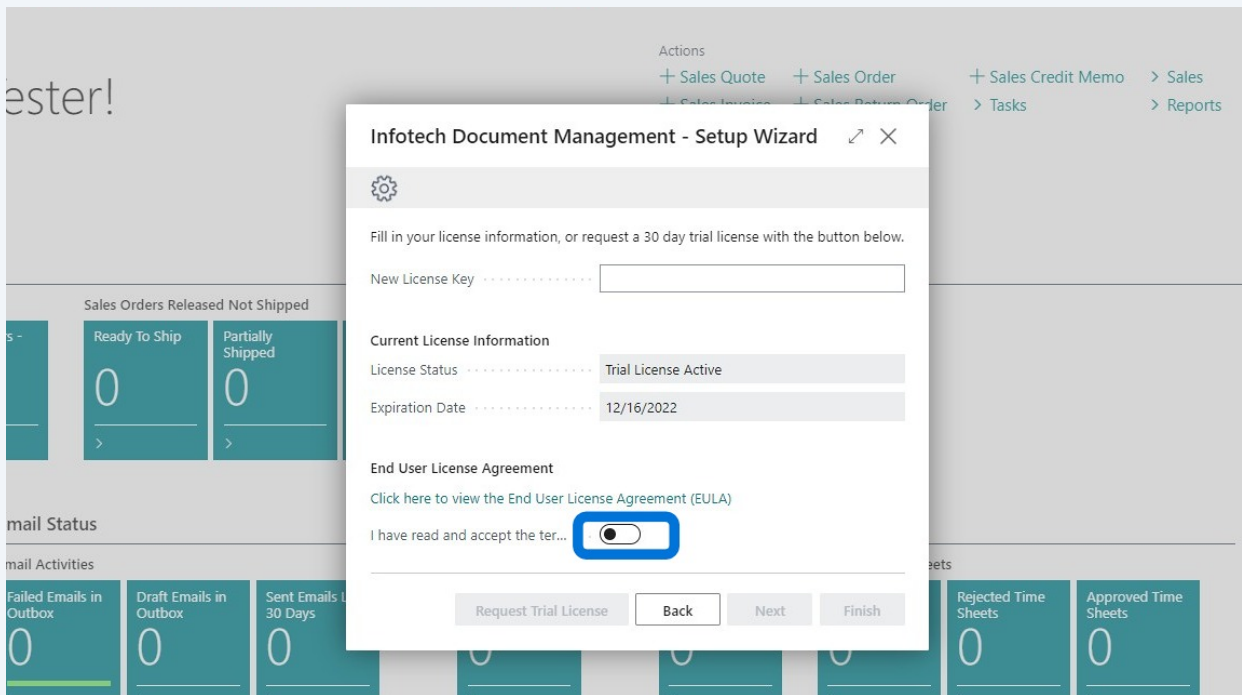
12 Click "Request Trial License" which will automatically populate the License Status field. Otherwise, copy and paste your paid license subscription key into the "New License Key" field.



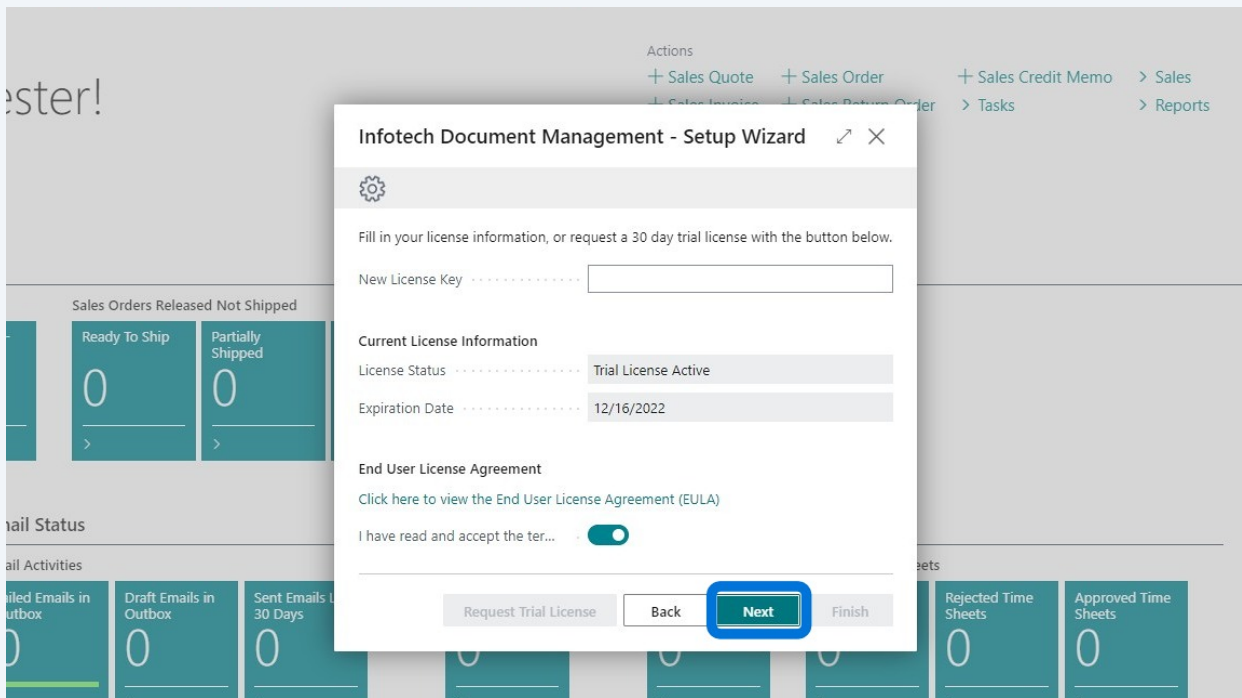
13 Click "Click here to view the End User License Agreement (EULA)"



14 Click here to accept the End User License Agreement (EULA).

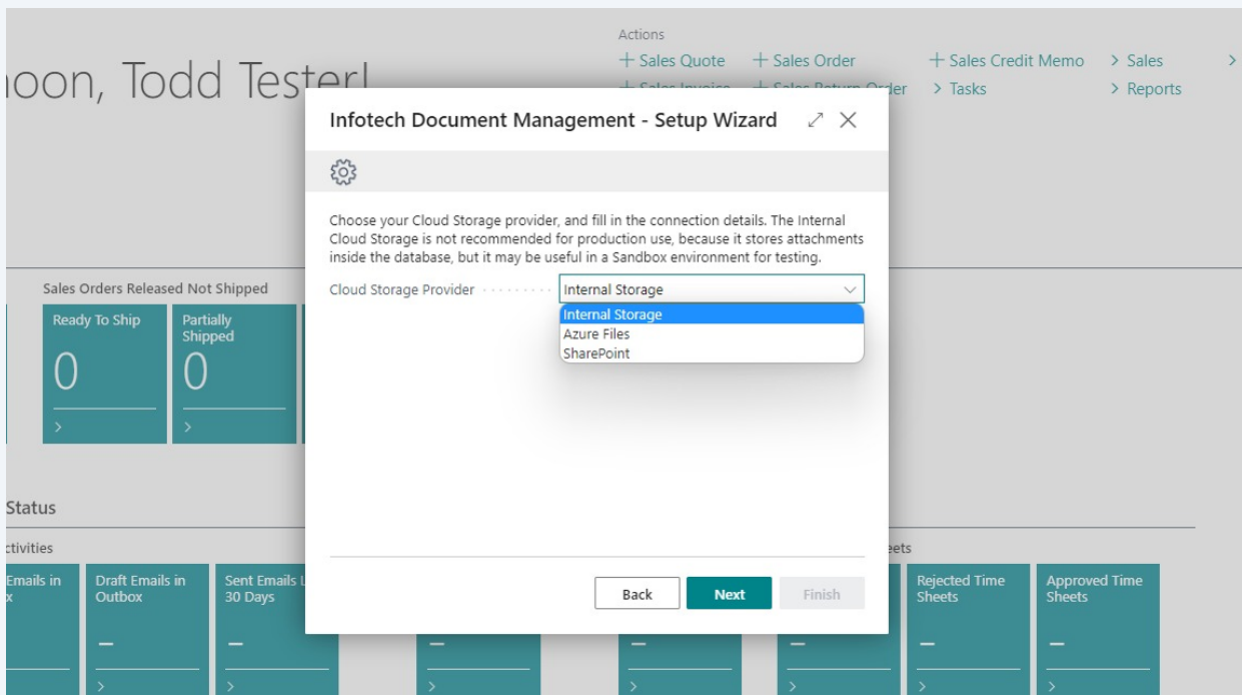


15 Click "Next"

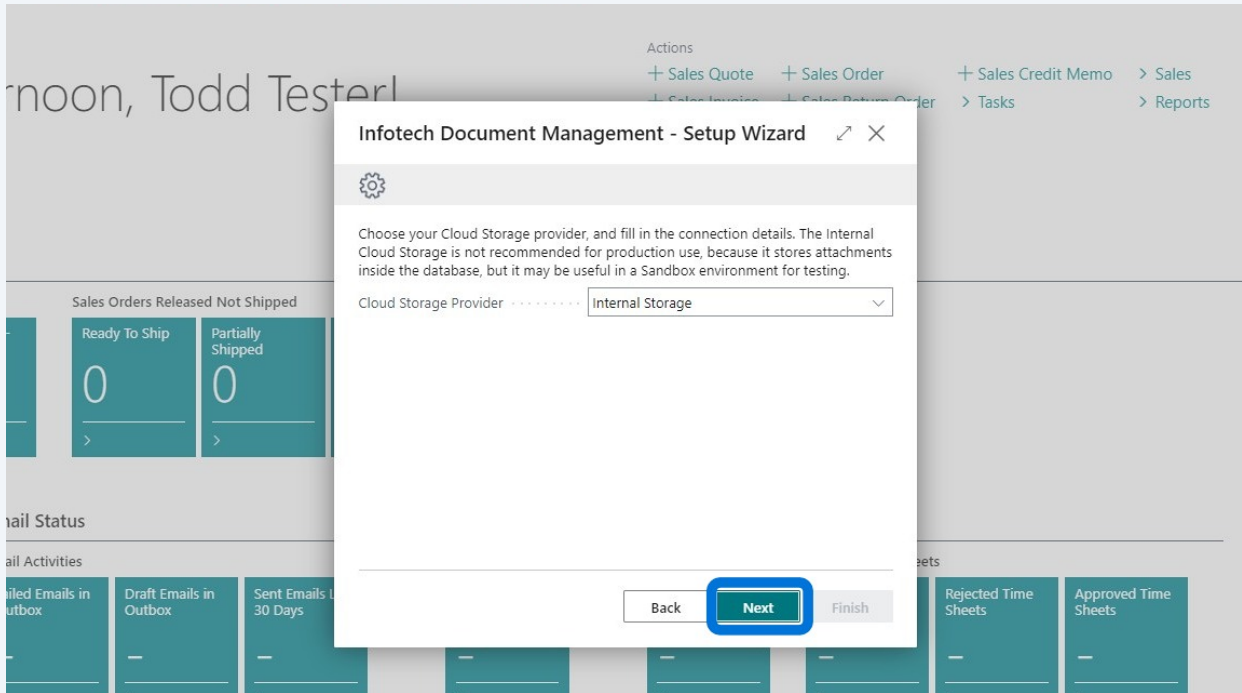


Cloud Provider

16 Click the dropdown menu to select the storage provider.



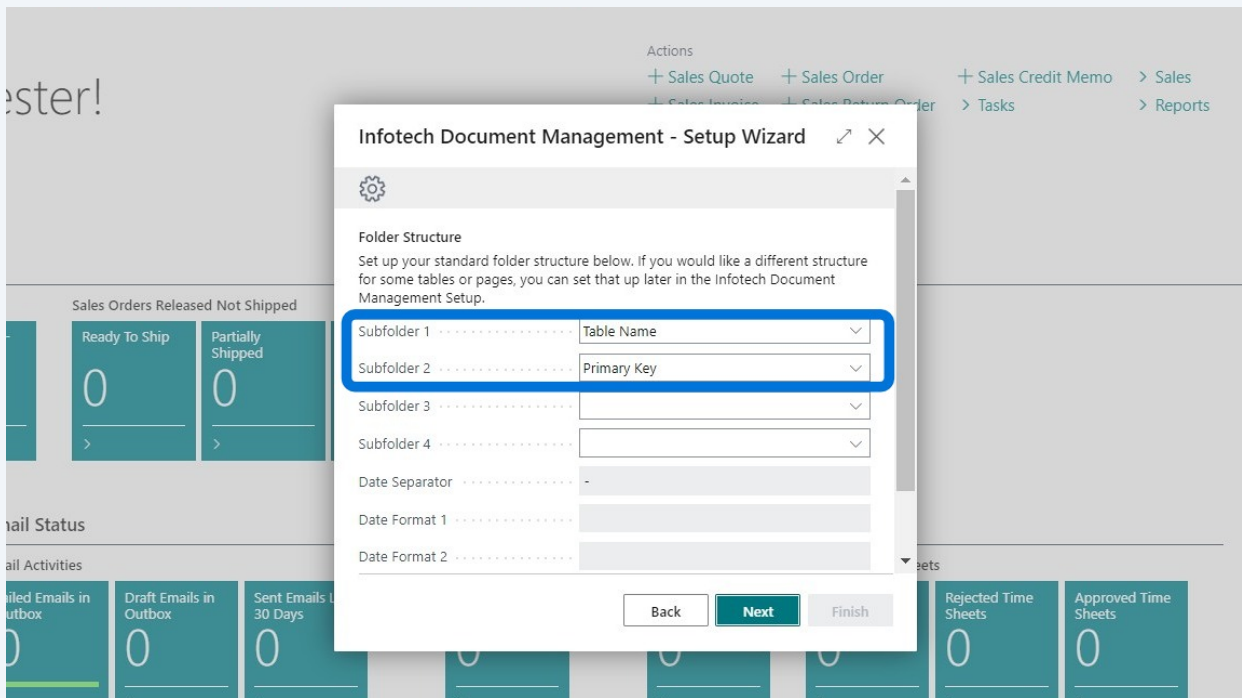
17 Click "Next"



Folder Structure

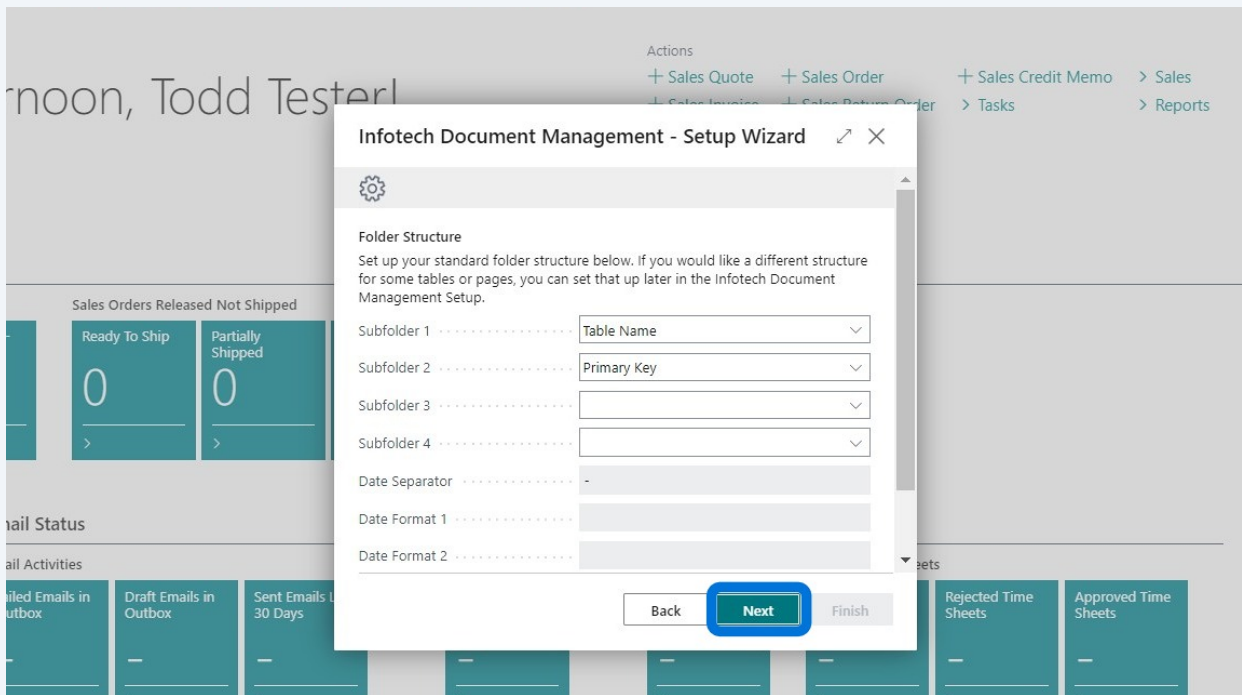
18

For each storage provider, choose the subfolder structure by selecting the dropdowns. Table Name and Primary Key are default.



19

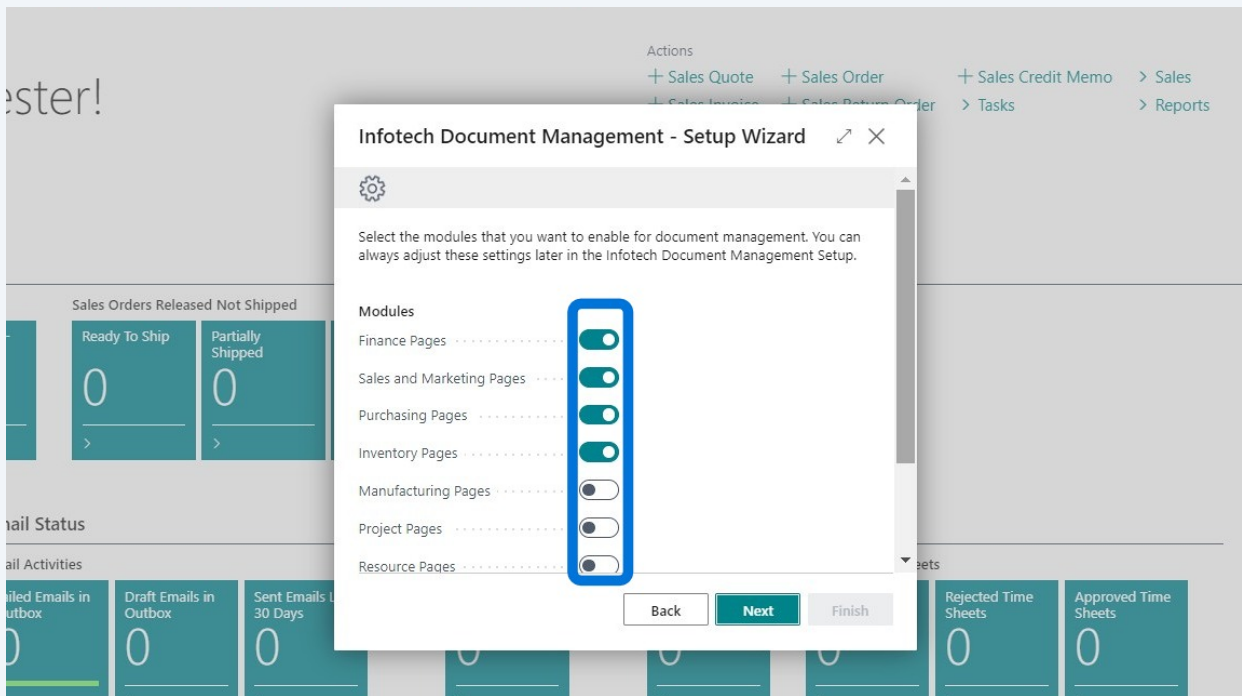
Click "Next"



Modules

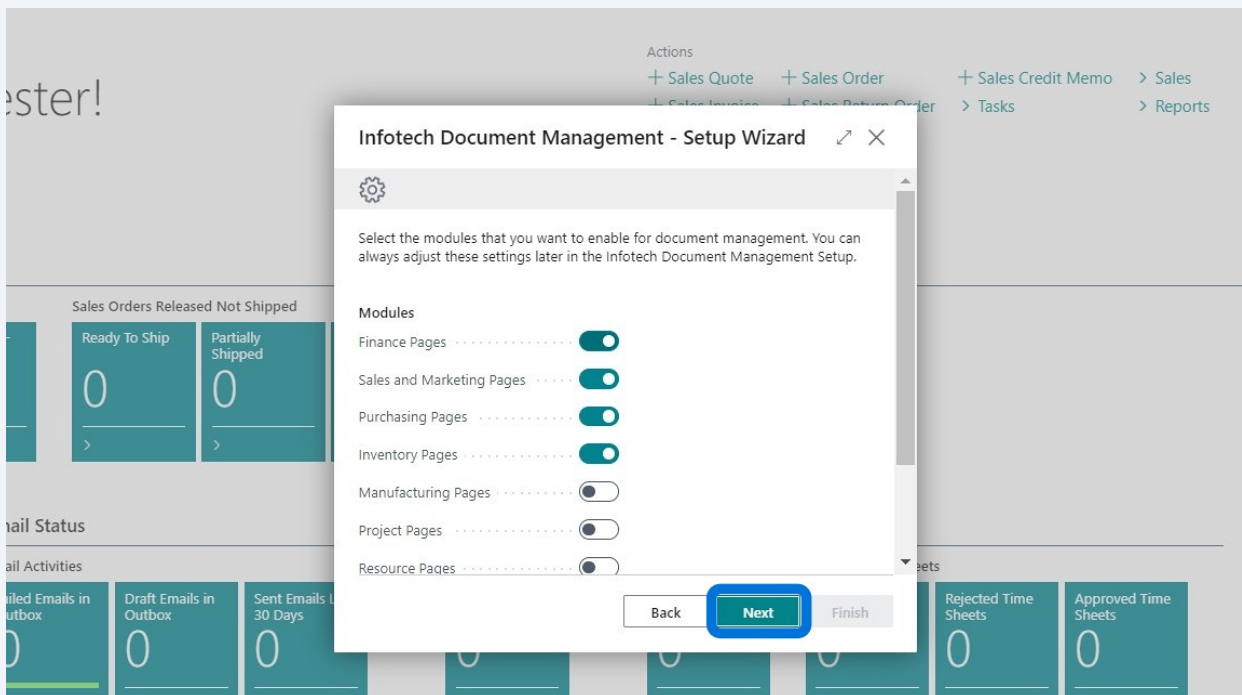
20

By default, document management is enabled for the following modules. Every page within these modules will have the drag and drop file management option.

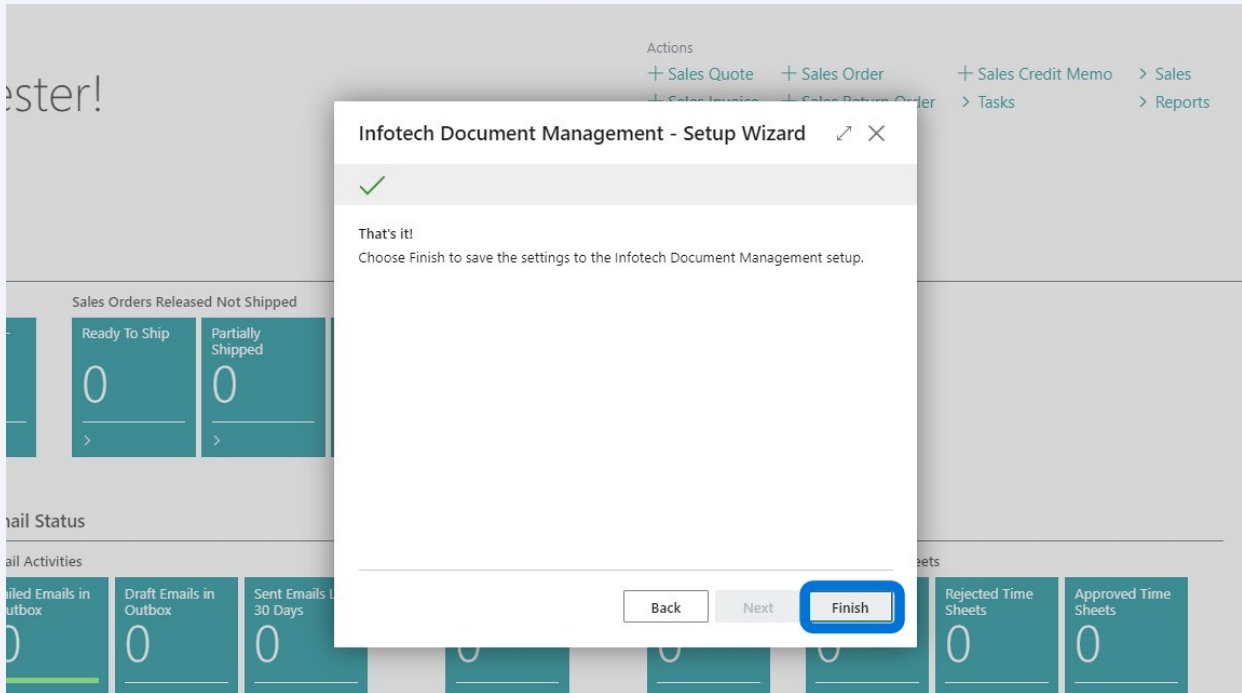


21

Click Next.

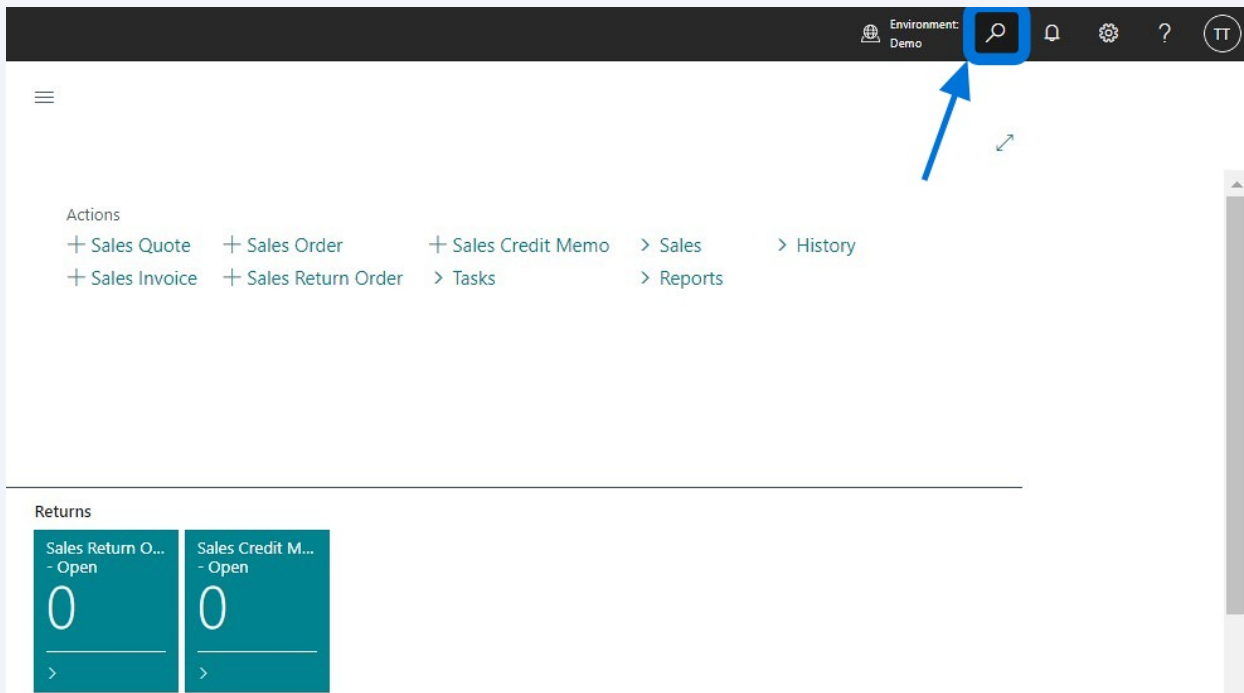


22 Click "Finish"

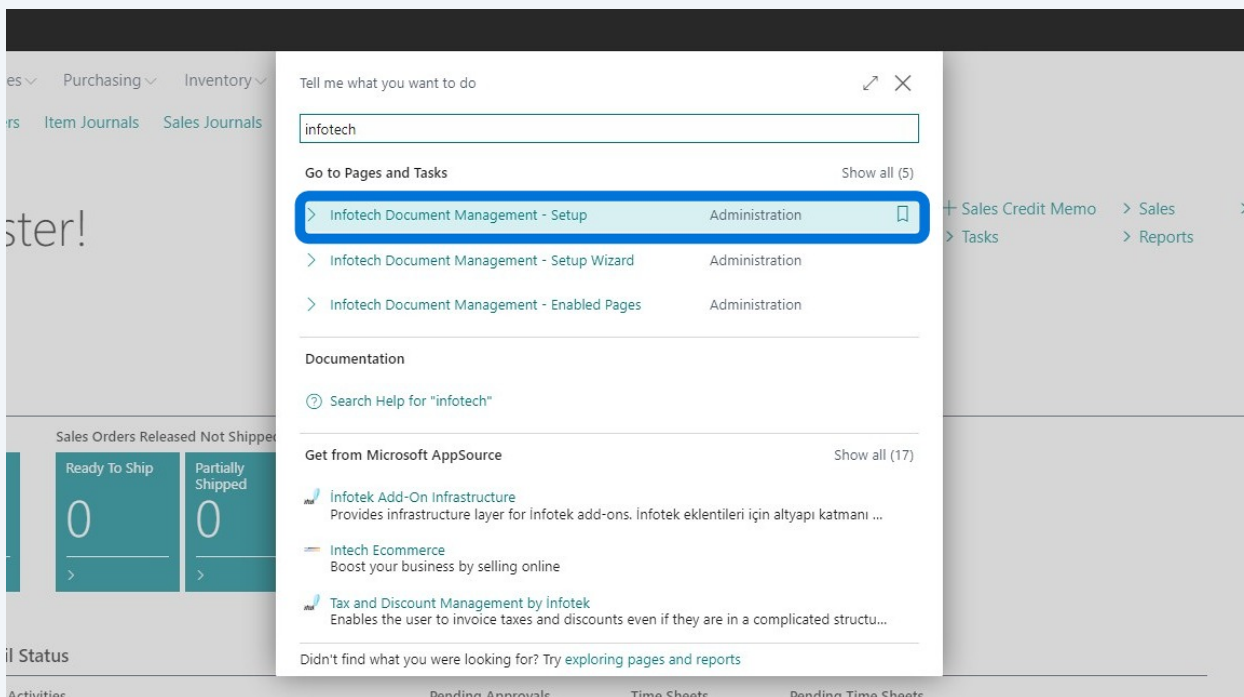


Advanced Setup Options

23 Click "Search..." magnifying glass.



24 Type "Infotech". Select "Infotech Document Management - Setup" to open the setup page which allows you to modify settings in the Infotech Document Management app.



License Information Setup

25

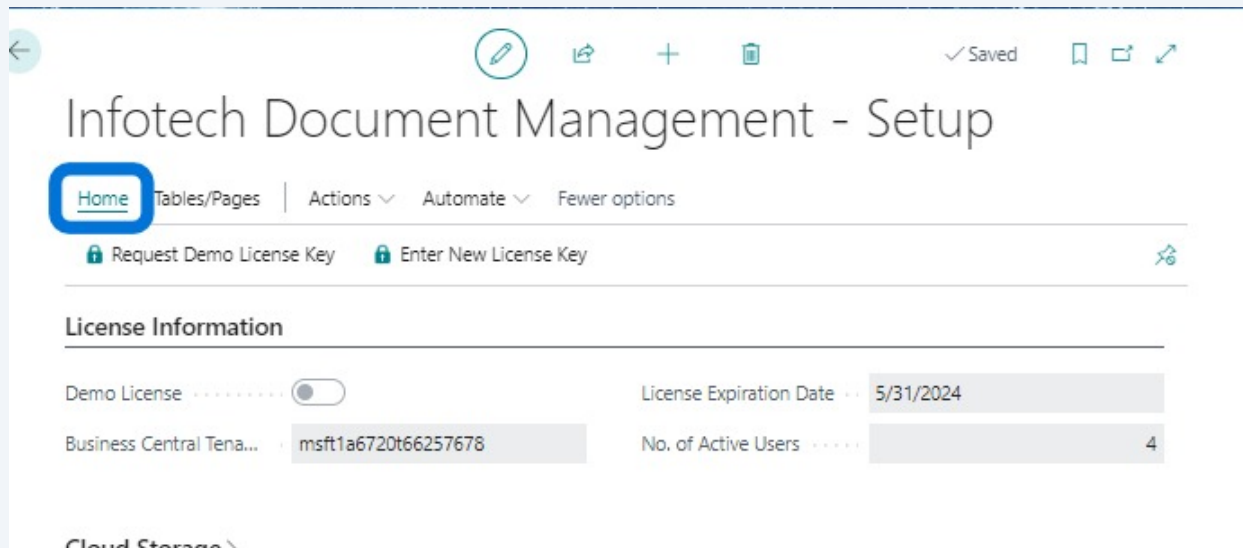
When a trial license expires, a notice will appear at login, indicating that the trial license expired.

Contacts Opportunities Sales Quotes Sales Orders Customers Items Active Segments Logged Segments Campaigns

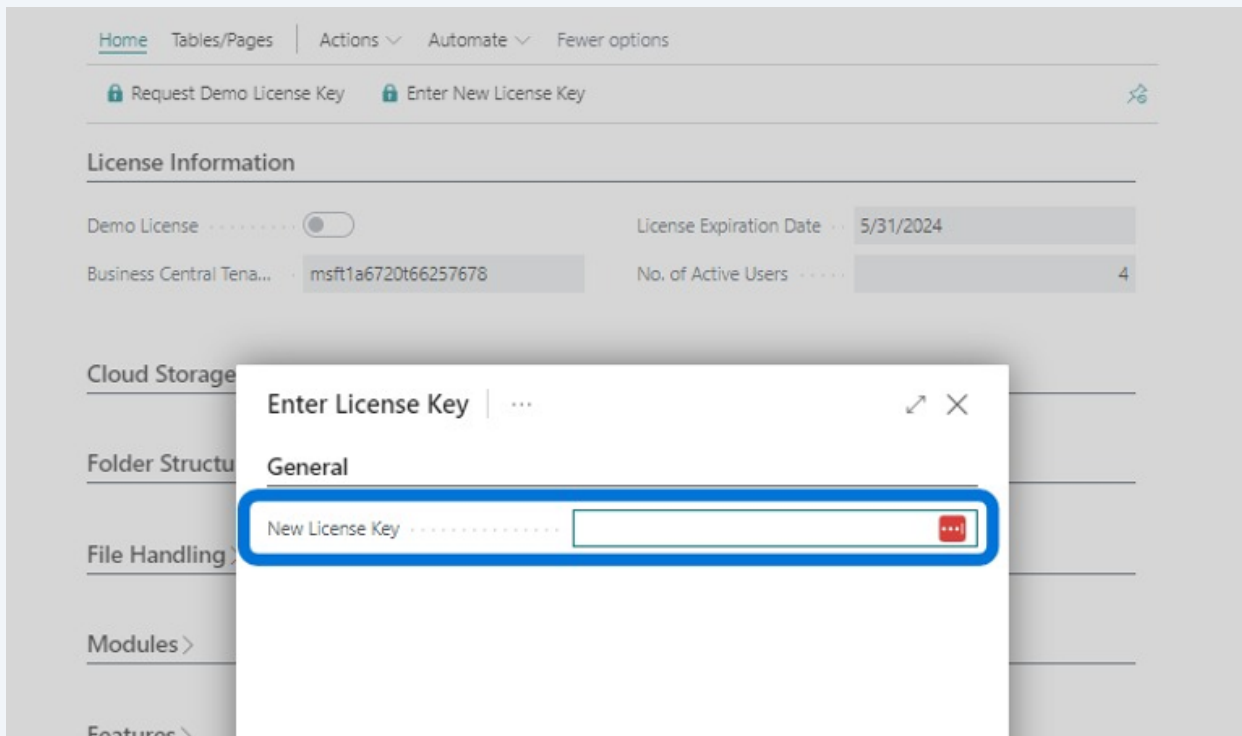
× Your trial license for Infotech Document Management has expired. Please contact Infotech Consulting Group to order a license. Contact

26

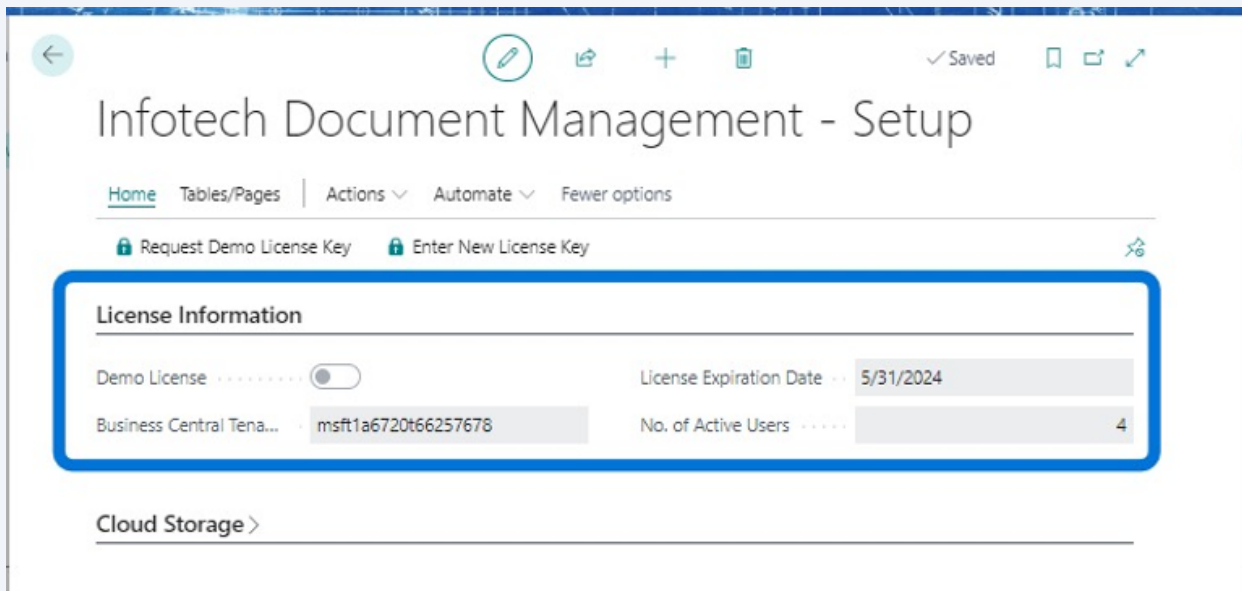
If a trial license has expired and a new paid subscription license has been received, search for Infotech Document Management - Setup within Business Central and select "Enter New License Key" under the Home menu.



27 Paste the new license key in the field below.

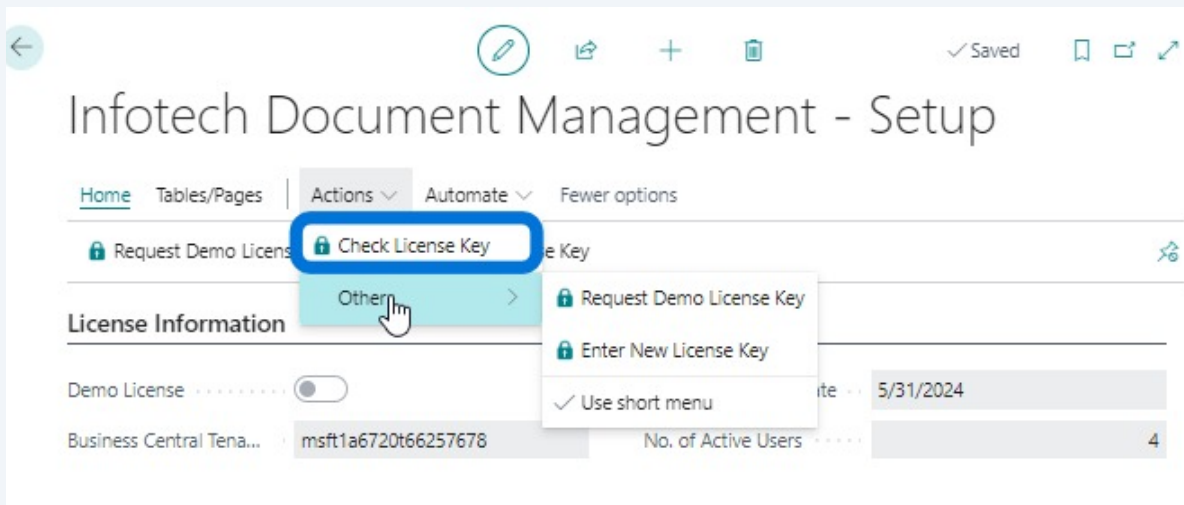


28 To confirm the license details, click on the "License Information" header to expand.



29

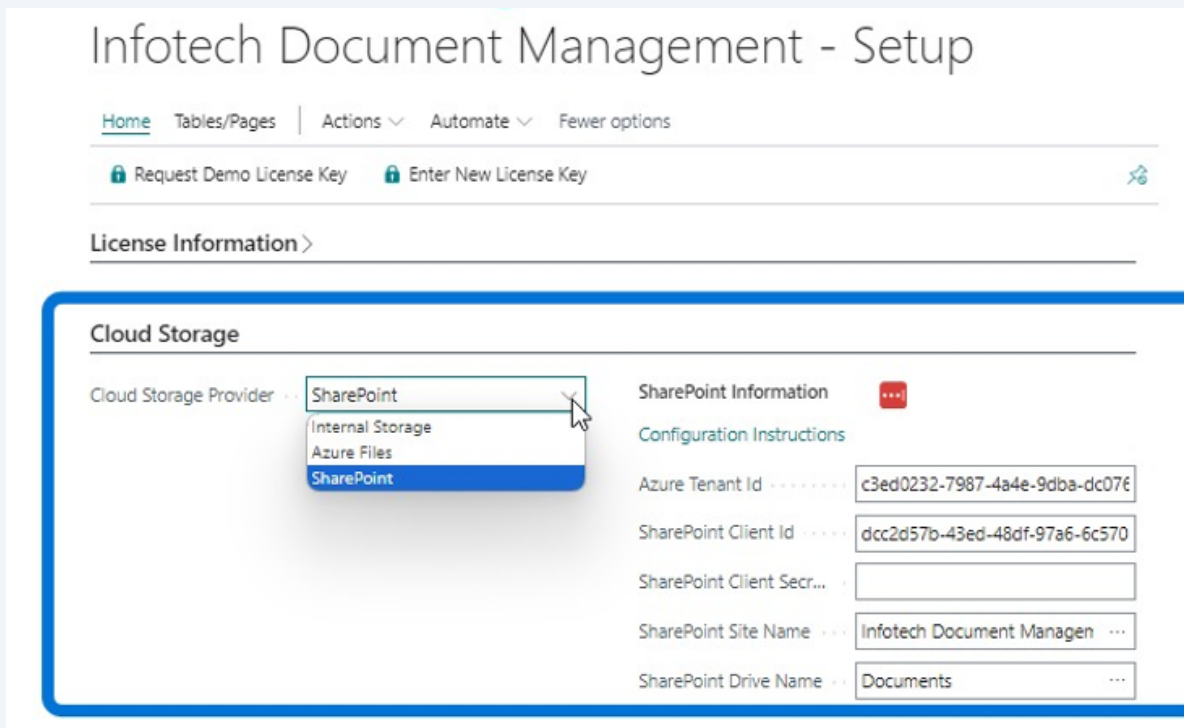
At any point, to confirm license key is active, click on Actions menu and select "Check License Key". License Check Successful message will display if active.



Cloud Storage Setup

30

Expand Cloud Storage header to view Cloud Storage information. Select the provider and update the additional fields as necessary.



Folder Structure Setup

31

Expand the Folder Structure header and click a dropdown to select a different subfolder structure.

SharePoint Drive Na... Documents

Folder Structure Show less

Subfolder 1	Table Name	Date Format 1
Subfolder 2	Primary Key	Date Format 2
Subfolder 3		Date Format 3
Subfolder 4		Date Format 4
Subfolder 5		Date Format 5
Subfolder 6		Date Format 6
Subfolder 7		Date Format 7
Subfolder 8		Date Format 8
Date Separator	-	

[File Handling >](#)

32

To modify the folder structure within a specific table or page, click "Tables/Pages" menu and select one of the options highlighted below.

NOTE: If any changes occur in the folder structure than what was initially setup, user is responsible for moving the files to the new cloud storage provider.

Infotech Document Management - Setup

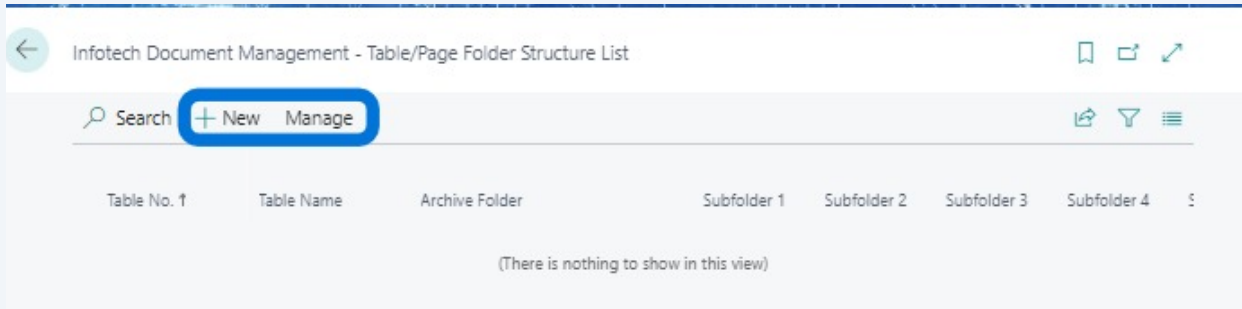
Process **Tables/Pages** Actions Automate Fewer options

Table/Page Folder Structure Table/Page Editable Modes Enabled Pages

Subfolder 3		Date Format 3
Subfolder 4		Date Format 4
Subfolder 5		Date Format 5
Subfolder 6		Date Format 6
Subfolder 7		Date Format 7
Subfolder 8		Date Format 8
Date Separator	-	

[File Handling](#)

33 Within Table/Page Folder Structure, click "New" to create a new structure or "Manage" to edit an existing.

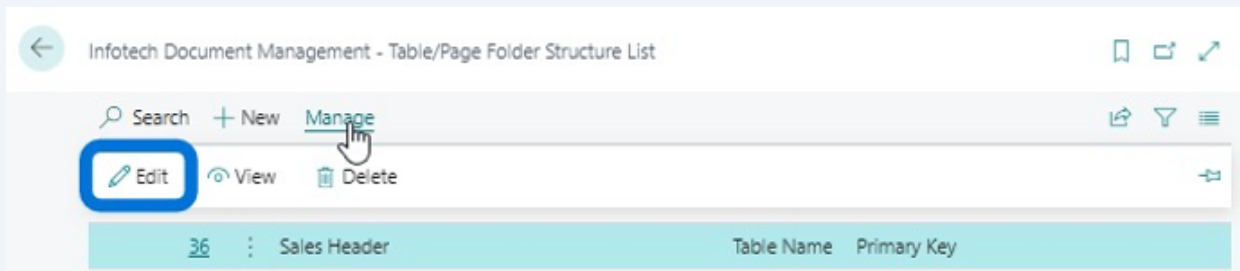


34 When selecting "New", select a table and define the folder structure.

The screenshot shows a form titled "Table Folder Structure Card". The form is divided into three main sections: "General", "Folders", and "Dates".
- **General**: Contains "Table No." (a dropdown menu with "0" selected) and "Table Name" (a text input field).
- **Folders**: Contains "Sub folders" (a dropdown menu) and "Fields" (a dropdown menu). Below these are eight rows, each with a "Subfolder" dropdown (labeled Subfolder 1 through Subfolder 8) and a "Field" input field (labeled Field No. 1 through Field No. 8).
- **Dates**: Contains eight rows, each with a "Date Format" input field (labeled Date Format 1 through Date Format 8) and a "Date Separator" input field.

35

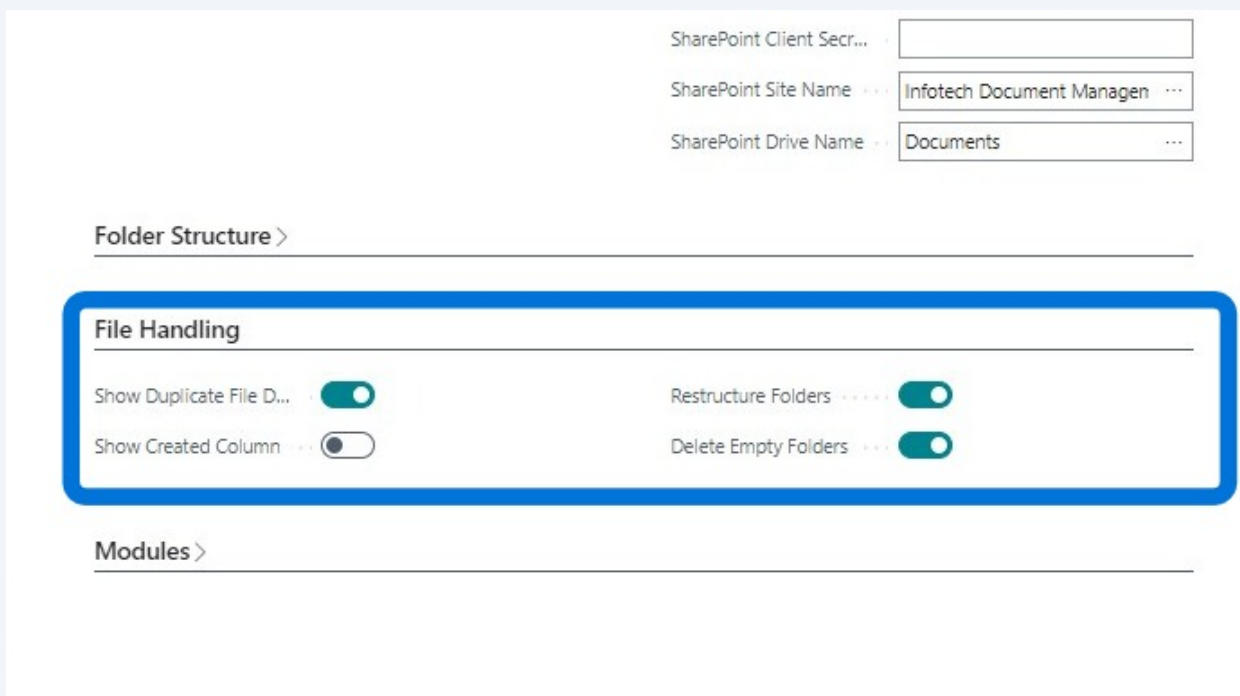
If a Table/Page Folder Structure already exists, select "Manage", then "Edit" to modify it; "Delete" to remove.



File Handling Setup

36

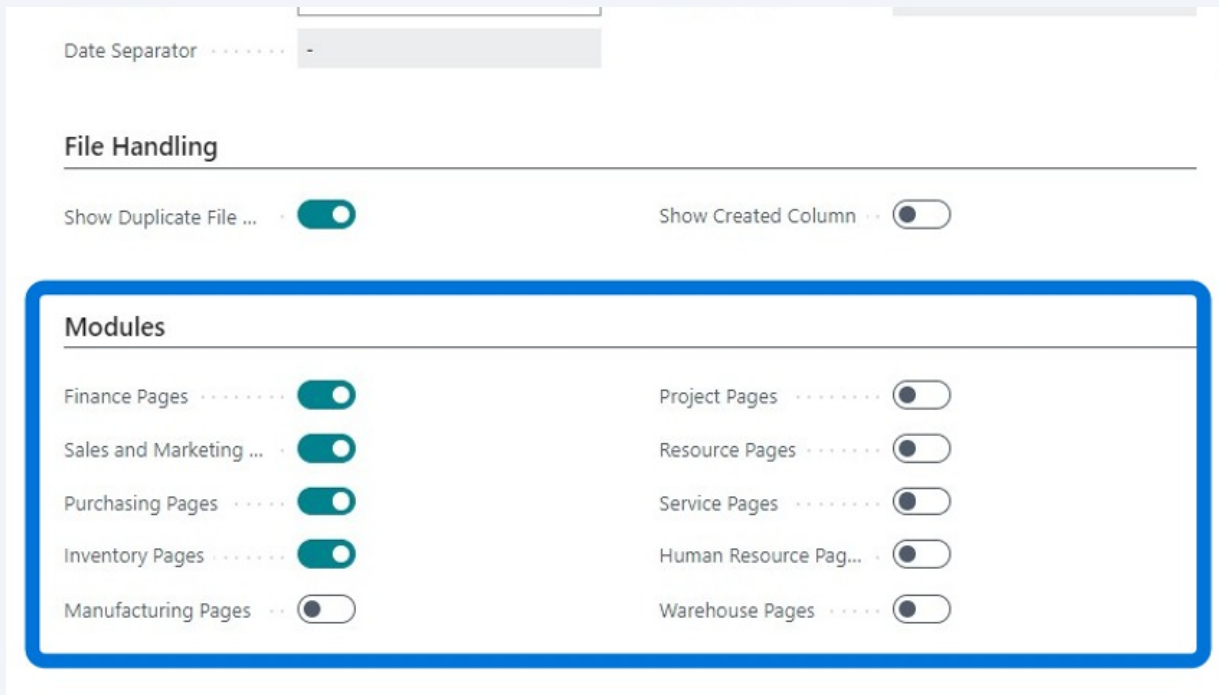
To make any changes to the File Handling, click on the slider button to enable or disable an option.



Modules and Copy Document Setup

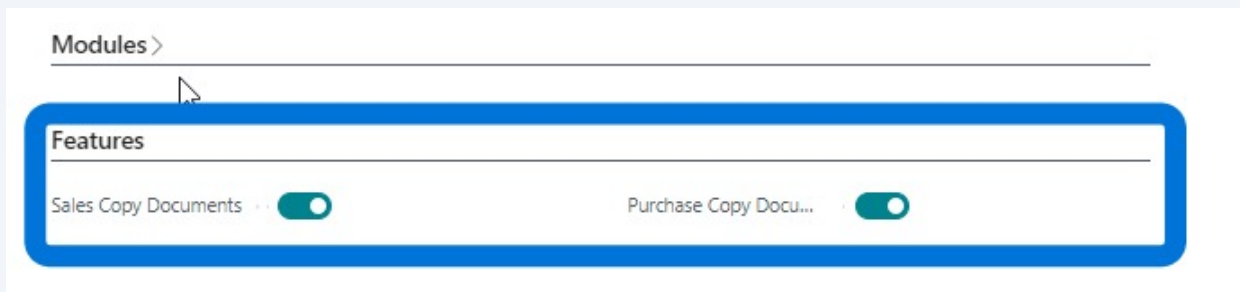
37

To include Infotech Document Management in a specific module, click on the slider button to enable or disable.



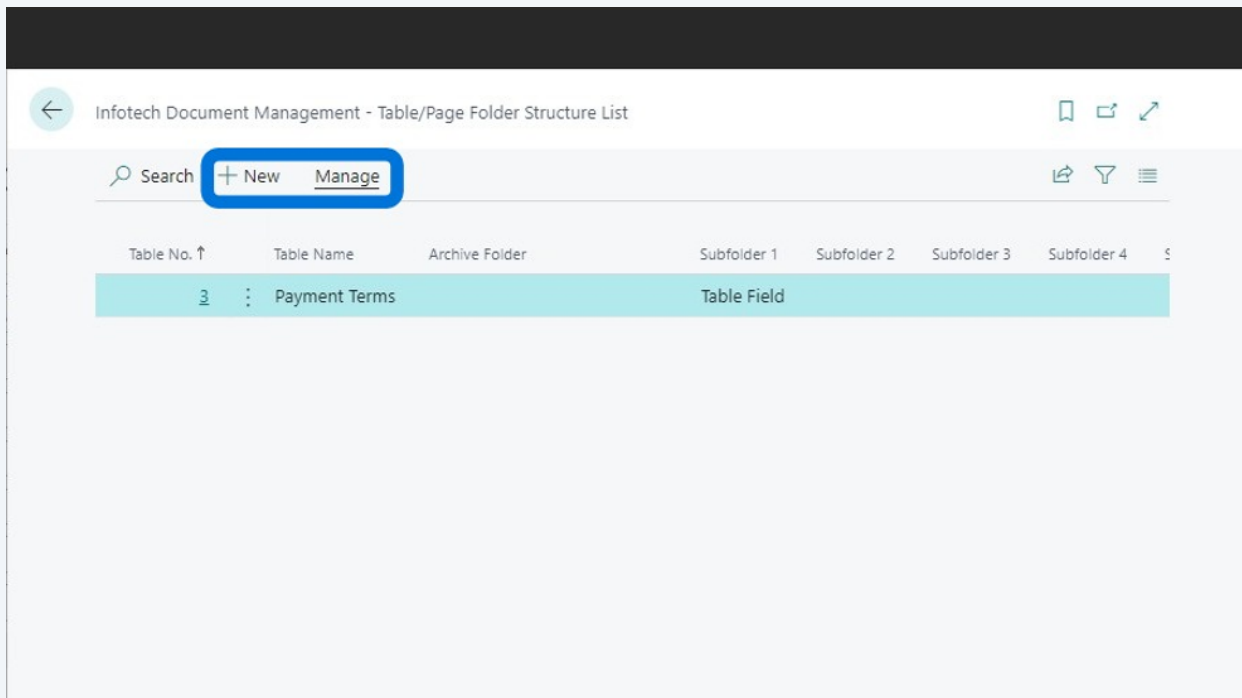
38

To copy attachments during Sales or Purchase Copy Document actions, click on the slider button to turn on or off the feature.



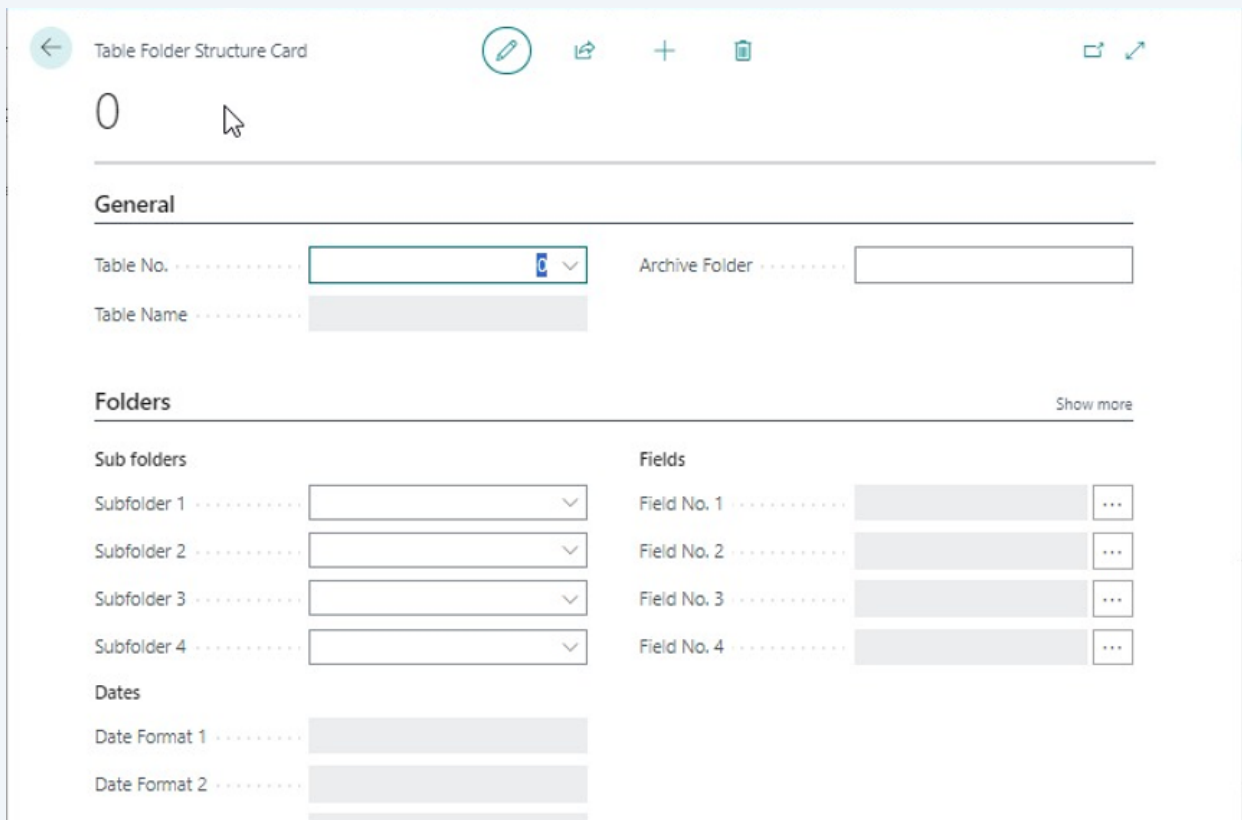
39

Within Table/Page Folder Structure, if a row already exists, highlight the row and click "Manage".

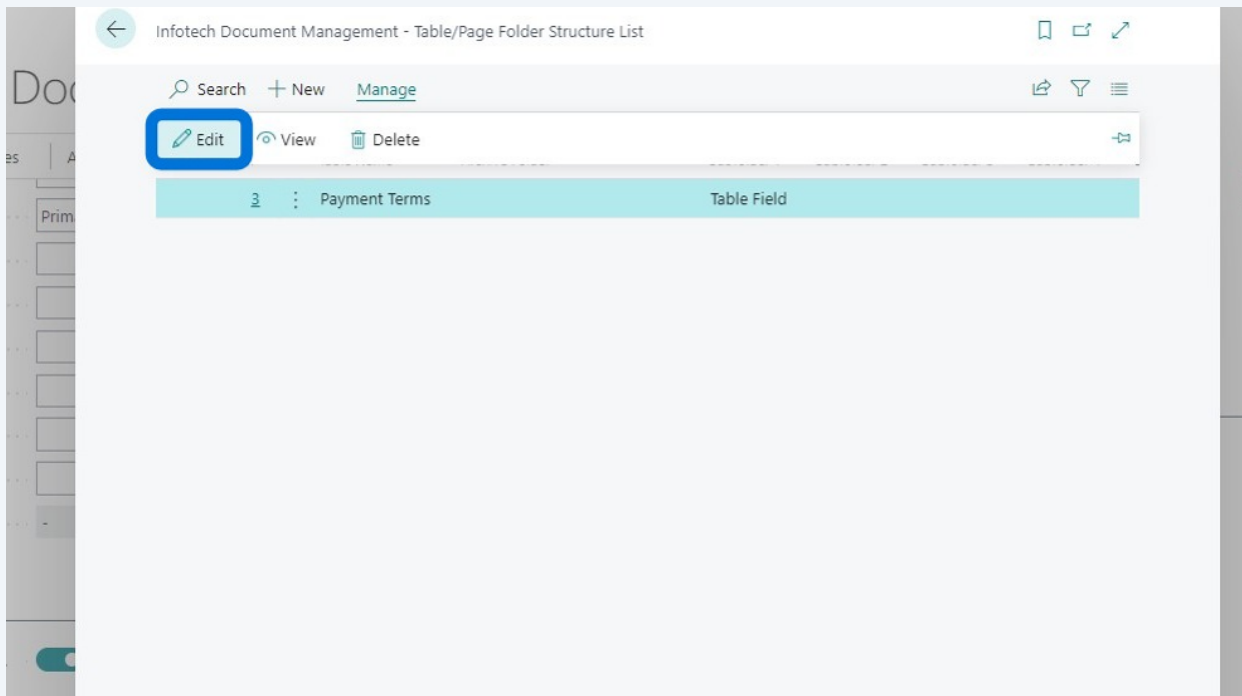


40

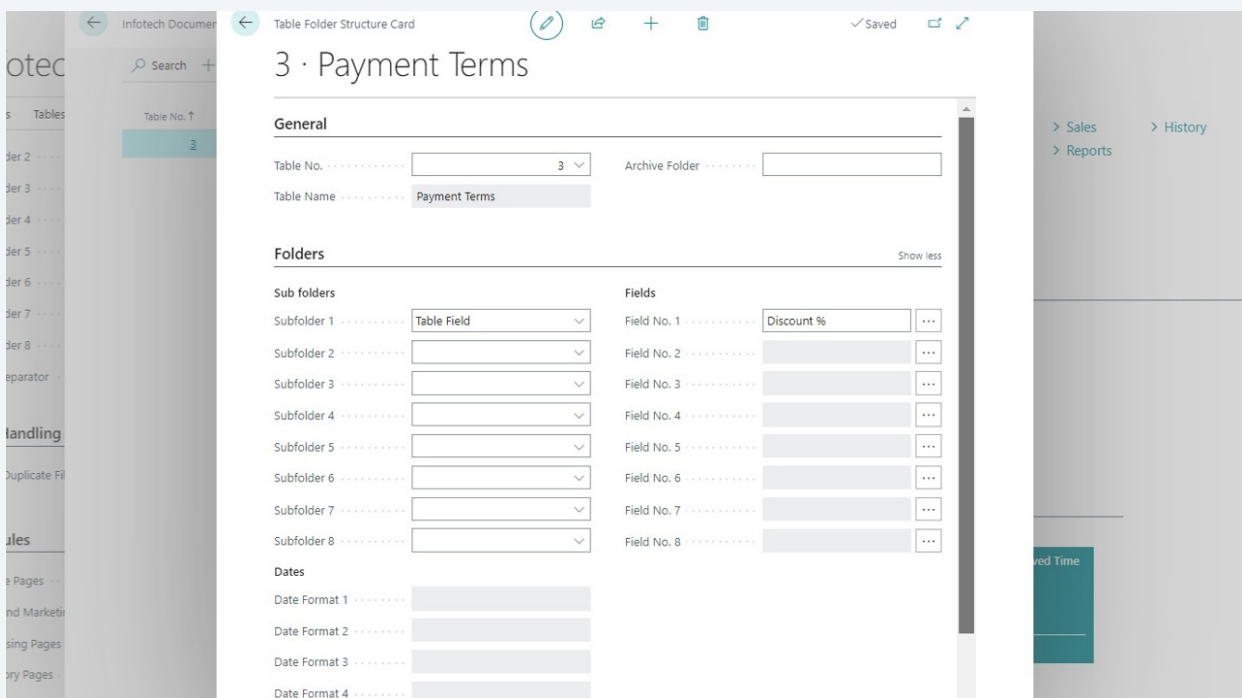
Selecting "New" will allow you to select table and subfolder options as seen in the screenshot. To return to the previous screen, select the Left arrow in the upper left hand side of the screen.



41 When selecting Manage, click "Edit" to adjust the selected row.



42 Modify settings as needed.



43 To modify modes, click "Table/Page Editable Modes".

Infotech Document Management - Setup

Process Tables/Pages | Actions ▾ Automate ▾ Fewer options

Table/Page Folder Structure **Table/Page Editable Modes** Enabled Pages

Subfolder 3	<input type="text"/>	▼	Date Format 3	<input type="text"/>
Subfolder 4	<input type="text"/>	▼	Date Format 4	<input type="text"/>
Subfolder 5	<input type="text"/>	▼	Date Format 5	<input type="text"/>
Subfolder 6	<input type="text"/>	▼	Date Format 6	<input type="text"/>
Subfolder 7	<input type="text"/>	▼	Date Format 7	<input type="text"/>
Subfolder 8	<input type="text"/>	▼	Date Format 8	<input type="text"/>
Date Separator	-			

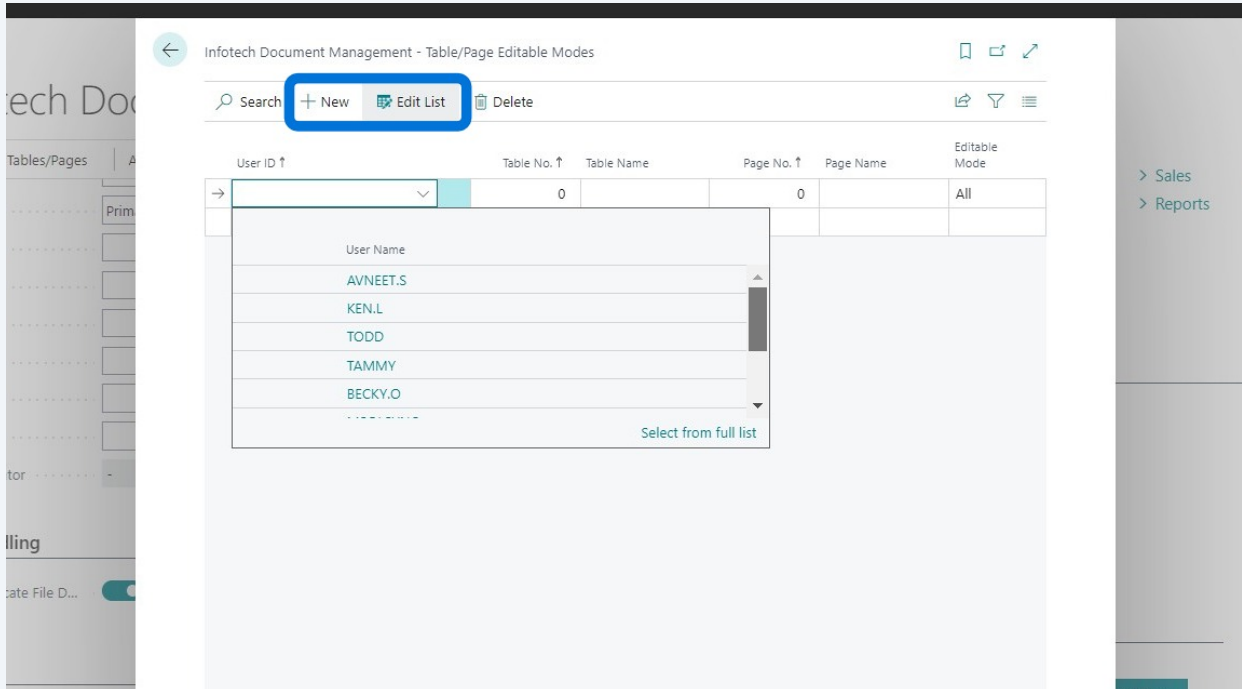
44 Select one of the following choices based on whether creating a new mode or editing/deleting an existing.

Search **+ New** **Edit List** Delete

User ID ↑	Table No. ↑	Table Name	Page No. ↑	Page Name	Editable Mode
<input type="text"/>	0		0		All

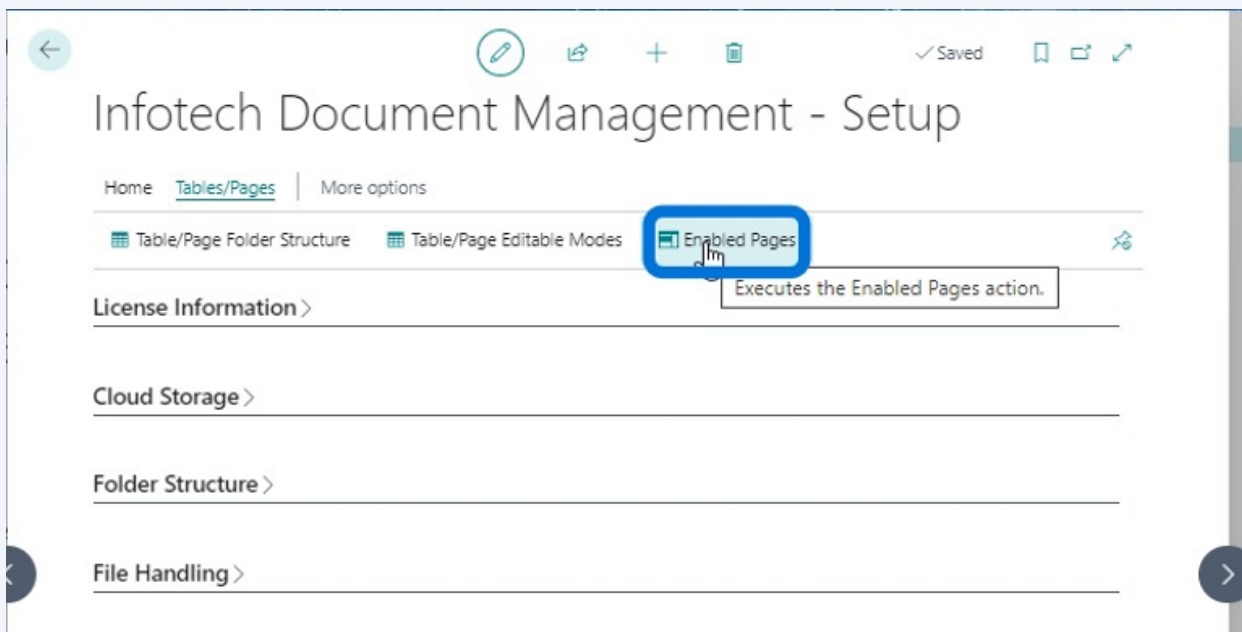
45

To create a new or edit an existing mode, click the drop down next to the first entry or the mode you want to edit. Select the necessary mode details and then click the back arrow to return to the previous page.



46

To enable or disable Infotech Document Management, select "Enabled Pages".



47

Select "+New". Specify a "Page No." which should auto populate the Page Name and Module fields. Finally check the "Enabled" box.

Infotech Document Management - Enabled Pages

Search + New Edit List Delete

	Page No.	Page Name	Module ↑	Enabled
→				<input checked="" type="checkbox"/>
	16	Chart of Accounts	Finance	<input checked="" type="checkbox"/>
	17	G/L Account Card	Finance	<input checked="" type="checkbox"/>
	18	G/L Account List	Finance	<input checked="" type="checkbox"/>
	20	General Ledger Entries	Finance	<input checked="" type="checkbox"/>
	370	Bank Account Card	Finance	<input checked="" type="checkbox"/>
	371	Bank Account List	Finance	<input checked="" type="checkbox"/>

48

To edit an existing page, select "Edit List" and check or uncheck the "Enabled" box on that Page No. line. When checked, Infotech Document Management will appear on that page. When unchecked, Infotech Document Management will not appear on the referenced page.

Infotech Document Management - Enabled Pages

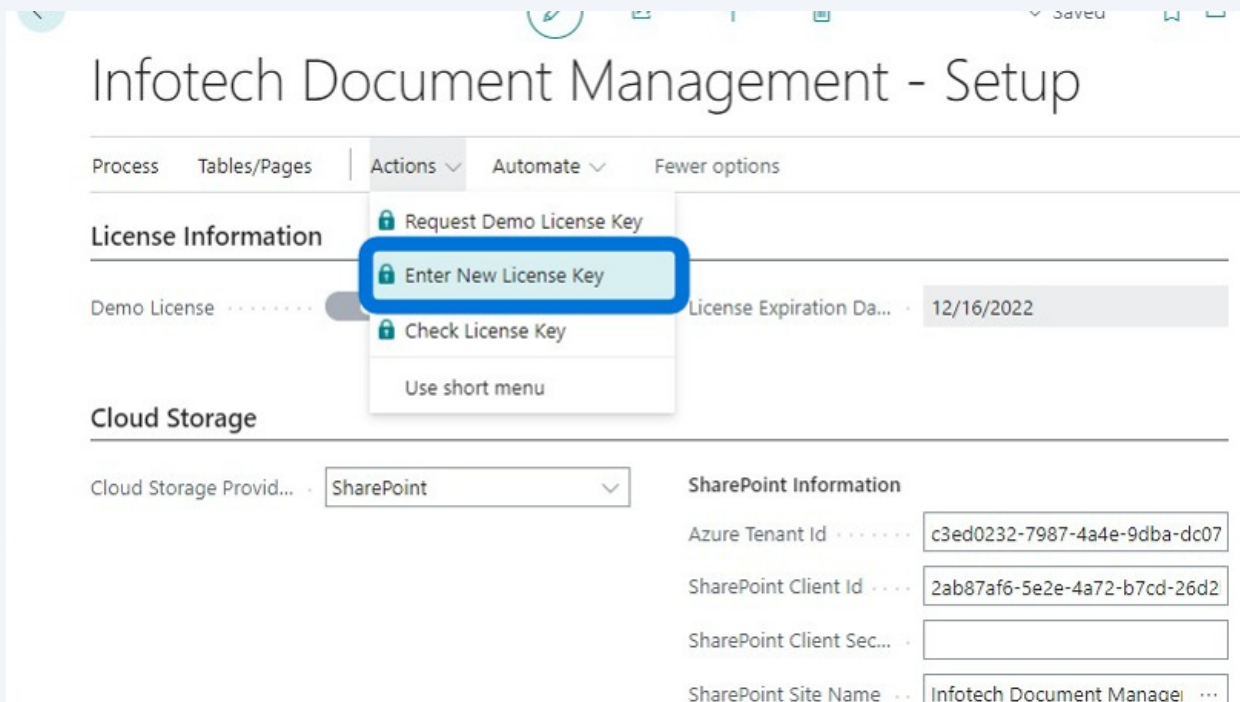
Search + New Edit List Delete

✓ Saved

	Page No.	Page Name	Module ↑	Enabled
	16	Chart of Accounts	Finance	<input checked="" type="checkbox"/>
	17	G/L Account Card	Finance	<input checked="" type="checkbox"/>
	18	G/L Account List	Finance	<input checked="" type="checkbox"/>
→	20	General Ledger Entries	Finance	<input checked="" type="checkbox"/>
	370	Bank Account Card	Finance	<input checked="" type="checkbox"/>
	371	Bank Account List	Finance	<input checked="" type="checkbox"/>
	372	Bank Account Ledger Entries	Finance	<input checked="" type="checkbox"/>
	374	Check Ledger Entries	Finance	<input checked="" type="checkbox"/>
	1600	Bank Deposit	Finance	<input checked="" type="checkbox"/>

49

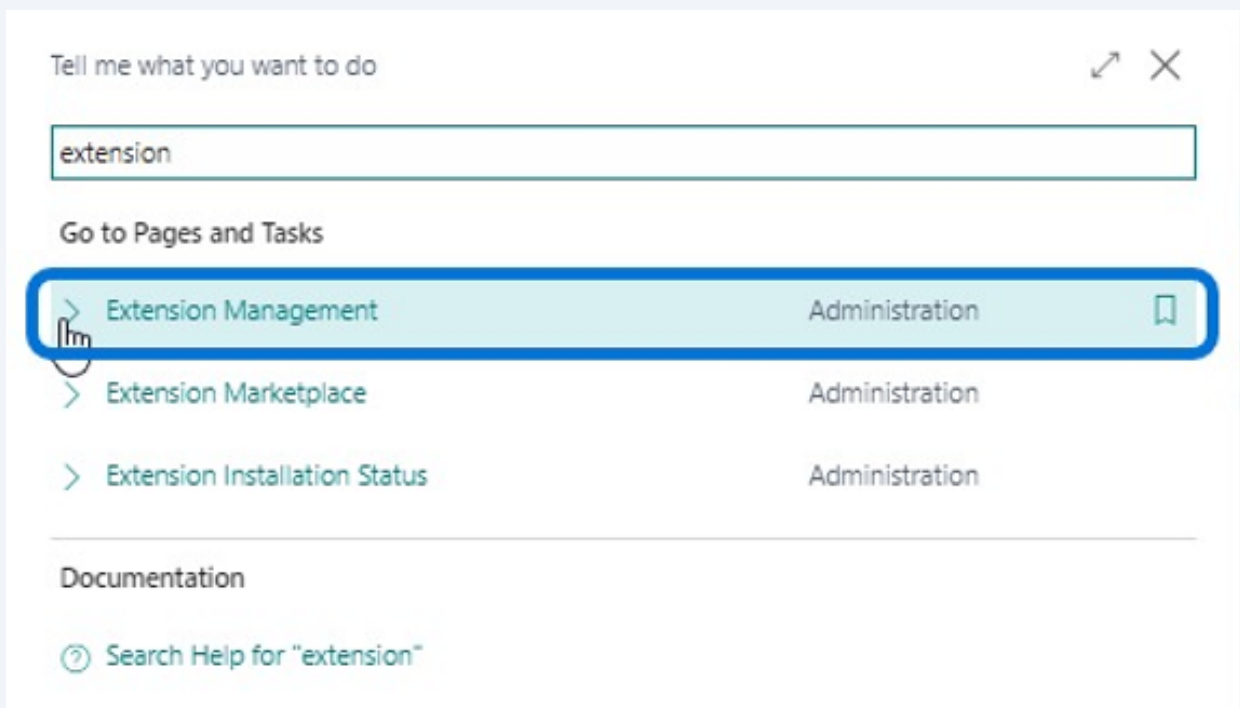
If a license key is received, click "Enter New License Key" if a subscription license has been requested.



Uninstall

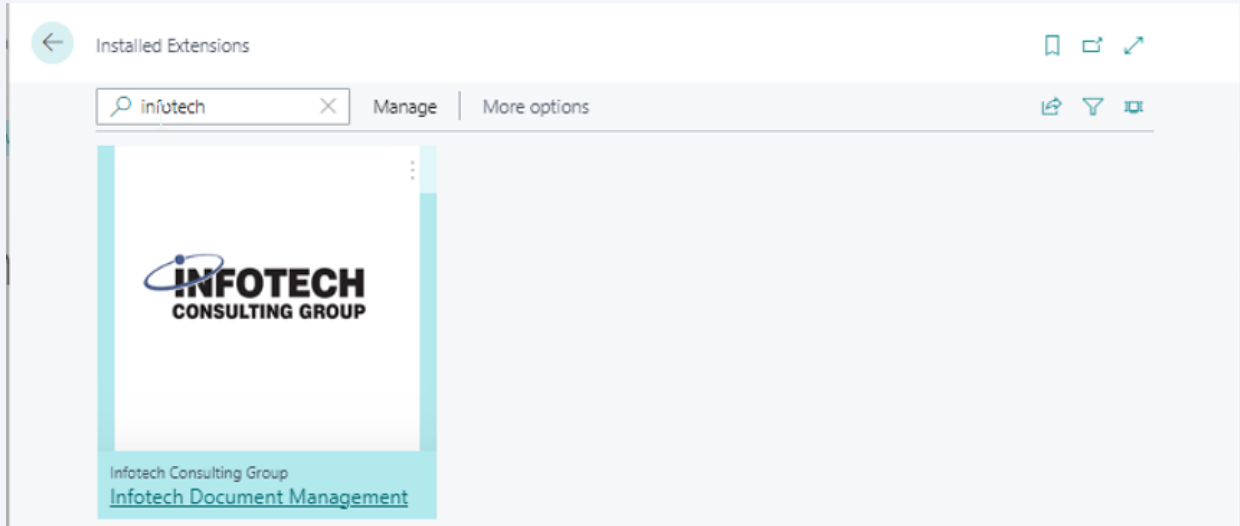
50

To uninstall Infotech Document Management extension, search for "Extension" and select "Extension Management".



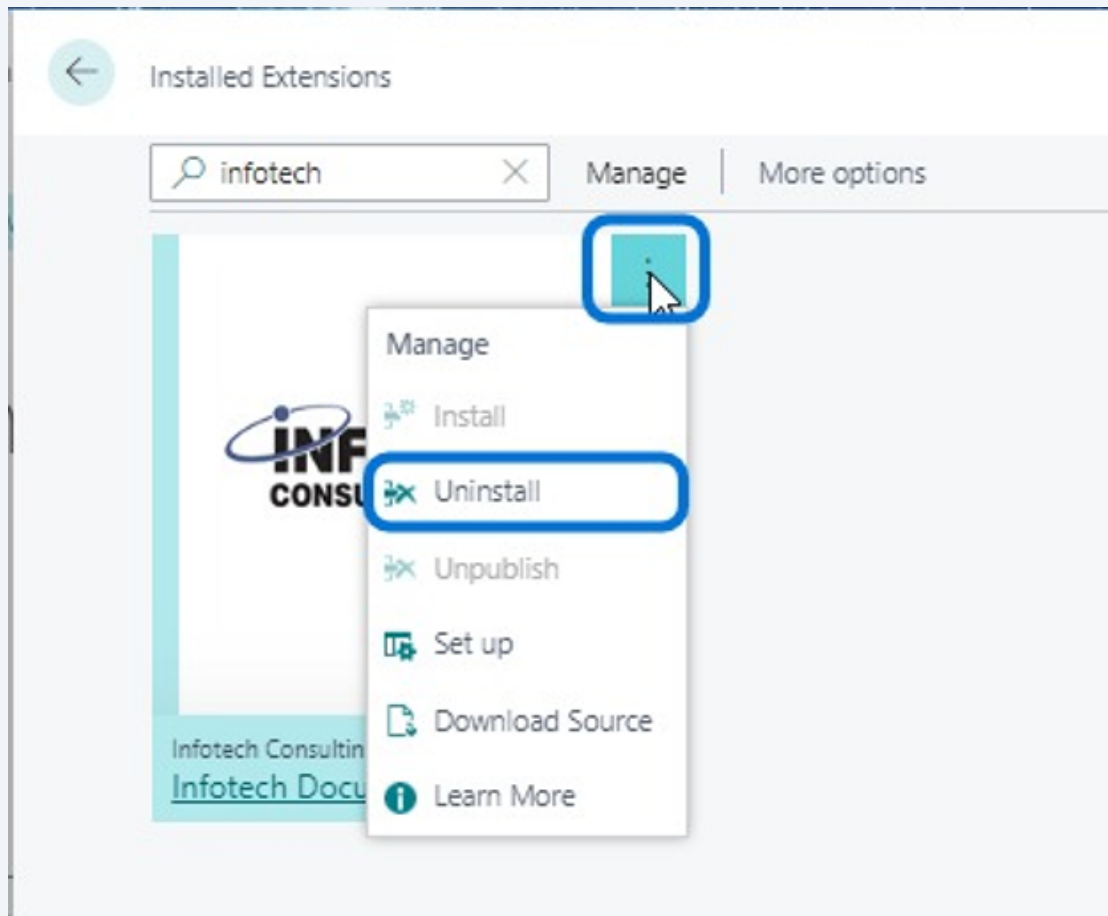
51

In the list of installed extensions, search for "Infotech Document Management". Confirm that the one you want to uninstall is highlighted with a blue background as seen below.



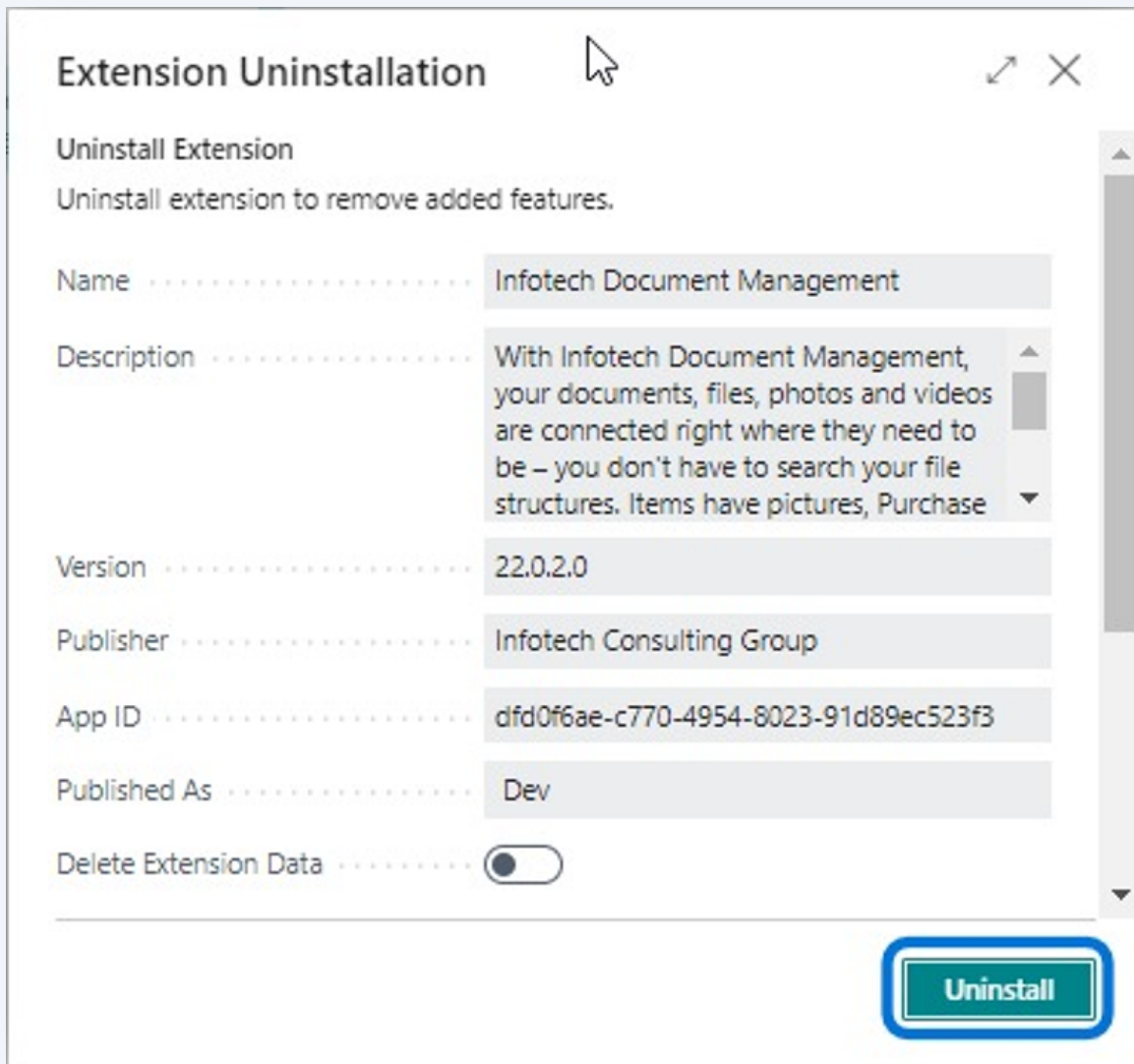
52

Click the 3 ellipses in the upper right hand corner of the extension and select "Uninstall".



53

The uninstallation wizard will begin. Remember to slide the toggle switch on to delete extension data along with the extension.



Support

54

For support, feel free to submit a request using Infotech Consulting Group's contact form at <https://www.infotech-inc.com/contact/> or phone us directly using the Main Office, Onalaska, Wisconsin contact number below.

