

# Introducing DocStar—Microsoft Dynamics 365 BC Integration Q&A

Webinar: DocStar—Microsoft Dynamics 365 BC Integration. Download the Replay and Presentation.

Can you process documents other than invoices, like sales orders?

We haven't defined the integration with sales orders yet. We do have the ability to process new vendor requests or purchase requests.

Is the data communication between DocStar and BC real-time?

Yes, we use the BC API's for all communication.

We have some invoices that include fields that were not shown on your capture demo. Are the fields captured user definable?

Yes, DocStar IDC and ECM can be configured to capture just about any field on an invoice.

How does the capture recognize a vendor if the vendor's name does not appear. Many invoices we get use graphics instead of their name?

We can configure the system to capture a unique identifier rather than the vendor's name. We can then use that unique identifier to extract the vendor's name from BC. It could be as simple as a phone number.

We need to have invoices approved based on the dollar amount and GL code. How is this handled?

DocStar workflows are very configurable, so routing can be based on any data associated with the invoice.

What happens if a vendor name does not exist. Sometimes we get invoices with a DBA name.

DocStar workflow will detect that the vendor's name does not exist and route the invoice to a processor for handling.

Will this software capture handwritten invoices we get from our landscapers?

No. DocStar IDC is designed for printed invoices only.

Do I have to scan each invoice separately to be processed by the capture program?

Once trained, DocStar IDC can separate invoices for you allowing you to scan an entire batch at one time. No need for barcodes or page separators.

Can we process PO based invoices with line-item matching and non-PO based invoices without line-item capture at the same time?

Yes, this is done through configuration.

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## Q&A

Can the system remind approvers if the invoice is not approved within a certain time frame?

Yes, we can add triggers to a workflow. If an invoice hasn't been approved within a certain time frame, reminders can be automatically sent, or the invoice could be routed to another manager for approval.

Is there any ability to do a look-up on unit of measures that mismatch between the PO and the Invoice if they are defined on the unit of measure schedule in BC?

Yes. It is possible.

Are you annotating the PDF directly or using an overlay?

All DocStar annotations are stored as an overlay and never alter the original document.

Love the supplier request form and the fact that this can be input/pushed directly into MRP. How does the system select the supplier/vendor ID to use?

Microsoft Dynamics BC assigns the Vendor ID when the vendor is created. If you use another ERP system, the Vendor ID can be generated by DocStar based on any information gathered on the form.

Is there a fee for each form submitted?

No. The DocStar Forms module does not charge per form.

Some vendors don't charge sales tax, can use tax be figured into individual invoices?

The DocStar workflow is very configurable, so calculations can be added as needed.

Can DocStar take a Packing Slip from Epicor and automatically attach it to the Sales Orders in Epicor at the time the Packing List is printed?

I believe this question is based on one of the Epicor ERP's, which is available for some ERP systems. Please contact your DocStar representative for further clarification.

Can I assume there's API integration for a digital signature package? (DocuSign etc.)

Yes. DocStar does have an API based integration with DocuSign allowing documents to flow through a workflow, route to the signing party and once signed, the signed version of the document is automatically added to DocStar. Both the original and signed versions are stored.

How does it handle duplicate invoices?

By default duplicate invoices are routed to an AP Processor for verification. The processor has the ability to change the invoice number if it is indeed not a duplicate or delete the document as needed.

How much is this software?

This will vary based on a number of variables. Please contact your DocStar Sales Director for additional information.

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**Is it a phone app or device aware web screen?**

The DocStar mobile approval is a device aware web page. We do have IOS and Android apps which are being expanded to include additional functionality.

**Do we pay per user or is user licensing concurrent?**

We offer Named, Concurrent, and Read Only users.

**Who designs the PO and Non-PO Workflows and Content Types?**

Typically these are designed by DocStar Professional Services. Once configured users with the correct rights would have the ability to create new workflows or modify existing workflows.

**Do we need DocuSign or are signatures built in?**

This depends. DocStar does have an approval process which may address your signing needs. If the DocStar approval process isn't robust enough our DocuSign connector does require you to have a DocuSign account.

**Jim meant to say "live lookup in BC not GP, correct?"**

Yes, this should have referenced BC and not GP.