DocXtender Battle Card

For Microsoft Partners who sell Insight Works apps

DocXtender lets users drag files onto Microsoft Dynamics 365 Business Central pages and attach them to the record. DocXtender stores files in Business Central or SharePoint Online, so purchase orders, invoices, and quality documents stay with the records they support. This is a completely free app from Insight Works for Business Central.

WHO TO CALL ON

Business Central online customers whose purchase orders, invoices, and quality documents sit in email folders and shared drives.

DocXtender helps teams that handle audits, customer questions, and handoffs between departments.

AT A GLANCE

Business Central	Online (cloud)
Licensing	Completely free, no Insight Works license
User license	Full user, Team Member, or device (Essentials or Premium tier)
Storage	Business Central or SharePoint Online
Availability	All countries where Business Central is available

What changes when you add DocXtender to Business Central

	Business Central without DocXtender	Business Central with DocXtender
Files on the record	Purchase orders, invoices, and quality certificates sit in email folders and shared drives. Finding one means leaving Business Central to search somewhere else.	DocXtender adds a drop zone to any page with the standard Attachment FactBox. Users drag one file or several onto it to attach them to that record.
Where files live	Some teams want attachments inside Business Central. Others organize documents in SharePoint for people without a Business Central license.	DocXtender stores files with Business Central Document Attachments, or in SharePoint Online with a link on the record. SharePoint folders follow record type and number.
Shared access	When a document lives on one person's computer, everyone else has to ask for it. Audits, customer questions, and handoffs slow down.	Every authorized Business Central user can open, download, or manage the file from the record. DocXtender sets no limit on attachments per record.

Selling points

Drag and drop onto the record.
A drop zone appears on any page with the standard Attachment FactBox, for one file or several.

Organized in SharePoint.
In SharePoint mode, folders follow record type and number, so people can open files directly in SharePoint.

No Insight Works license.
Runs on Business Central online with full user, Team Member, or device licenses, on Essentials or Premium.

Business Central or SharePoint Online.
Store files with Document Attachments, or upload them to SharePoint Online with a link on the record.

Shared with every authorized user.
Authorized users open, download, or manage attachments, with no DocXtender limit on attachments per record.

Know the limits.
Self-hosted SharePoint servers, Windows File Explorer, and on-premises file servers are not supported.

Qualify the opportunity

1. Are you using Business Central online today? Which records do you use most?
2. How do you store documents for purchase orders, invoices, or quality records today?
3. Do documents tied to orders or invoices get lost or misplaced?
4. Do you store documents in SharePoint Online, OneDrive, or other tools?
5. Do you use SharePoint Online, a self-hosted SharePoint server, or file servers?
6. Can everyone who needs a document reach it today?
7. Do people without a Business Central license need to reach these documents?
8. Is your document process paper-based, digital, or both?
9. Do you need to attach email messages or other file types to records?
10. Do audits or compliance rules require documents that are easy to find?

Common questions

Does it run on Business Central online?
Yes. DocXtender runs on Business Central online (cloud).

What Business Central license is needed?
A full user, Team Member, or device license on the Essentials or Premium tier. Device licenses need non-interactive mode set up in DocXtender Setup.

Which pages does it work on?
Any page with the standard Attachment FactBox. Other pages can be added with standard Business Central page extensions.

Does it need other Insight Works apps?
No. DocXtender does not require any other Insight Works app.

How is it licensed?
DocXtender needs no Insight Works license or subscription on Business Central online.

Where are files stored?
In Business Central Document Attachments or in SharePoint Online. Self-hosted SharePoint servers, Windows File Explorer, and on-premises file servers are not supported.

How are files organized in SharePoint?
DocXtender puts files in folders by record type and number. People can find and open them directly in SharePoint.

Resources

Sales kit: insight-works.com/partner-hub/docxtender

App page and demo: insight-works.com/apps/docxtender

Datasheet: DocXtender datasheet (PDF)

Partner hub: insight-works.com/partner-hub

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For a pre-sales meeting, a demo, or implementation guidance, send a message at insight-works.com/partner-hub/contact.

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