INSIGHT WORKS

DOCXTENDER

for Microsoft Dynamics 365 Business Central

100% FREE APP FOR BUSINESS CENTRAL

★★★★★ **5.0 on Microsoft Marketplace** · **Over 5,000 Installs**

EFFORTLESSLY LINK DOCUMENTS TO PAGES, WITH MULTI-USER ACCESS AND SHAREPOINT INTEGRATION, ENHANCING EFFICIENCY.

Drag-and-drop attachments on any Business Central page that has an Attachment FactBox, stored in Business Central or in SharePoint Online.

DocXtender is a free Business Central extension that attaches documents to Business Central records by drag and drop. This is a completely free app from Insight Works for Business Central. A customer purchase order goes on the sales order, a vendor invoice goes on the purchase order, and a quality certificate goes on the receipt, from the same Attachments FactBox, without a separate document system to learn or a manual step to remember.

Why it holds up

Drag, drop, done. Drag one file or several onto the Attachments FactBox on the page you are working in. The attachment is made when the files land, with nothing more to complete.

Attachments at the line level. On sales and purchase orders, a document can be attached to an individual line, not just the document header, so the document stays with the line it belongs to.

Your choice of storage. Keep documents in Business Central's built-in Document Attachments, or link them to SharePoint Online. The mode is chosen per environment, and the two are not combined.

Findable outside Business Central. In SharePoint mode, documents are filed in a folder structure by record type and record number, so a person can find a document directly in SharePoint without opening Business Central.

Behavior you control. An administrator decides whether a drop happens silently or asks for confirmation, and how duplicate file names are handled: prevent, rename automatically, or prompt to rename.

No ceiling on attachments. Attach as many documents to a record as it needs, across common file types including PDF, Office formats, images, and .zip, with access for every user who has the page open.

Who's on it

Accounting personnel
Attach invoices and receipts to the related records, which streamlines financial management and audits.

Supply chain managers
Attach purchase orders, invoices, and receipts to the related records for easy reference.

Quality assurance specialists
Attach quality documents to receipts or orders for quick access to compliance information.

Sales & customer service representatives
Attach customer orders, contracts, and communication records to keep a complete customer history.

IT & Business Central administrators
Choose the storage mode and set drop and duplicate behavior.

Free, with no license to buy. DocXtender costs nothing to install or run. It installs from Microsoft Marketplace, and Business Central prompts for configuration the first time it is used. A valid Business Central user license is still required.

Backed by over 800 resellers. Insight Works works through a global network of more than 800 Business Central resellers who can help consult, implement, and support a deployment. **See the Insight Works reseller directory**.

DOCXTENDER for Microsoft Dynamics 365 Business Central

DRAG & DROP ATTACHMENTS

- Drag files onto the Attachments FactBox icon on any Business Central page that has an Attachment FactBox
- Drop one file or several at once
- Line-level attachment on sales and purchase order lines, not just the document header
- Find, download, and delete attached documents from within Business Central
- Unlimited attachments per record

SUPPORTED FILE TYPES

- PDF, Office formats, images, .zip, and email messages (.msg), among other common document types

STORAGE MODES

- **Document Attachments:** documents stored in Business Central's built-in attachment feature
- **SharePoint Online:** documents linked to the record and stored in SharePoint; self-hosted SharePoint servers are not supported
- Chosen per environment; the two modes are not combinable
- Once SharePoint is configured, documents can be viewed directly from Business Central

SHAREPOINT FOLDER STRUCTURE

- Folders are created by record type and record number (for example, Sales Header, then S-ORD1017)
- Documents can be found directly in SharePoint without going back into Business Central
- Opens the door to SharePoint workflows, alerts, and Power Automate on the stored documents
- Someone without a Business Central license can be given access to the documents directly in SharePoint

DROP & DUPLICATE HANDLING

- Drop behavior is configurable: silent, or a confirmation prompt
- Duplicate files: prevent, rename automatically, or prompt to rename
- SharePoint mode does not support the rename prompt; Document Attachments mode does not support replace

NON-INTERACTIVE MODE

- An Azure AD app registration can authenticate SharePoint uploads with no user present
- Used for job queues, web services, and Warehouse Insight handheld photo and signature capture

BUSINESS CENTRAL LICENSING

- Free app; no separate Insight Works license required
- Installs from Microsoft Marketplace at no cost
- Requires a Business Central user license: Essential, Premium, or Team Member
- Microsoft licensing is separate and is not included

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension
- On first use, DocXtender prompts for configuration, so no separate setup step is needed beforehand
- SharePoint mode requires SharePoint Online to be configured; non-interactive mode requires an Azure AD app registration
- A developer can add drag-and-drop support to pages that do not ship with an Attachment FactBox, using event subscribers (version 2.1.7982.2 and newer)
- Multi-language support through Business Central's own auto-translation tooling

PREREQUISITES & COMPATIBILITY

- Business Central Cloud (SaaS) only; on-premises deployments are not supported
- SharePoint Online only for SharePoint mode
- Works on pages that have the standard Attachment FactBox
- Available globally wherever Business Central is available

SUPPORT & RESOURCES

- Knowledge base at kb.dmsiworks.com: install and user guides, SharePoint and non-interactive mode setup, permissions, release notes, and the developer extension pattern
- Questions go to Insight Works or a Business Central reseller

DATA & PORTABILITY

- Document Attachments mode keeps files in Business Central's own attachment storage
- SharePoint mode keeps files in your own SharePoint Online folders, organized by record type and record number, where they open directly without Business Central

ALSO FROM INSIGHT WORKS

Insight Works builds 30+ apps for Microsoft Dynamics 365 Business Central, concentrated in these areas of manufacturing and distribution. If Business Central has a gap, there's a good chance we already have a solution.

Warehouse & Inventory Management
Barcode-driven receiving, put-away, picking, cycle counting, and license plate handling.

Shipping & Fulfillment
Carrier rate shopping, pick-to-ship execution, and shipment tracking.

Quality Control & Compliance
Inspections, test management, and quality documentation.

Production Planning & Scheduling
Capacity-aware scheduling, planning worksheets, and demand forecasting.

Shop Floor Execution & Maintenance
Shop floor data capture, machine maintenance, and production analysis.

Point of Sale & Data Tools
Counter sales, document attachment, label printing, and bulk data import/export.

See all Insight Works apps for Business Central

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