

# BUSINESS CENTRAL INVOICES WITHOUT RDLC

Create branded invoices in Word with DocumentsCorePack



DocumentsCorePack enables Business Central users and partners to design, maintain, and generate branded invoice documents without custom report development. Using Microsoft Word as the layout design environment, business users can map live Business Central data into reusable document templates, add related-record details, include item images, apply conditional content, and generate finished PDF invoices directly from Business Central records.

## The Challenge

For many Dynamics 365 Business Central projects, document layouts become a hidden bottleneck. Customers often need invoices, quotes, order confirmations, shipping documents, or reports that include more than standard header and line data. They may need product images, payment terms, salesperson information, customer-specific messaging, legal text, or regional formatting.

When these changes require technical report customization, small document requests can delay implementation timelines, create post-go-live support tickets, and pull developers away from higher-value work. For customers, these seemingly small document requests often result in extended project timelines, and unexpected consulting costs.



Invoice layouts are difficult to customize



Payment, tax, or product information needs to change dynamically based on invoice data



Developers are pulled into minor layout or field-mapping changes



Customer-facing documents lack consistent branding



Manual edits introduce invoice errors and version-control issues



# The Solution

With DocumentsCorePack for Dynamics 365 Business Central, users design business documents in Microsoft Word and connect those templates directly to Business Central data. Instead of relying on technical report development for every layout change, teams can use a familiar Word-based environment to build professional, data-driven documents.



DocumentsCorePack is ideal for Business Central partners, consultants, and business teams looking to create professional, customer-ready sales PDFs without the complexity of traditional report development. By using familiar Microsoft Word tools, users can easily design, customize, and maintain document templates while ensuring consistent branding and accurate data from Business Central. Whether supporting sales, finance, customer service, or day-to-day operations, teams can streamline document creation, reduce manual effort, and deliver polished documents faster.

# Key Capabilities

DocumentsCorePack offers a broad range of capabilities that enable business users to seamlessly design invoice layouts in Microsoft Word while working directly with Business Central data. From inserting structured ERP fields and building dynamic line tables to adding product images, applying conditional logic, and generating finished PDFs directly from the record.



## Word-Based Template Design

Users build and update document layouts in Microsoft Word, making the process more familiar for business users and less dependent on technical report design.



## Product Images

Item images can be added to invoice layouts, creating richer customer-facing documents that include visual product references.



## Direct Access to BC Data

The designer exposes Business Central fields and relationships so users can insert invoice, customer, company, salesperson, and line-item data into templates.



## Conditional Content

Payment instructions, legal text, or other content can be shown based on Business Central field values, making documents adaptive to the data in each record.



## Related Record Mapping

Templates can pull data beyond the invoice header, including invoice lines, company information, shipping details, salesperson records, and item-level attributes.



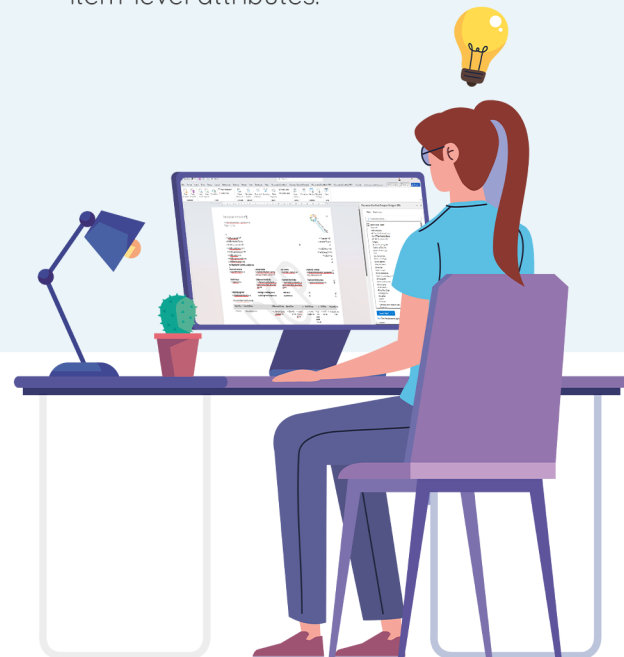
## PDF Generation Inside BC

Templates can pull data beyond the invoice header, including invoice lines, company information, shipping details, salesperson records, and item-level attributes.



## Dynamic Line Tables

Invoice line tables automatically repeat for each invoice item, allowing quantities, prices, VAT values, descriptions, weights, and other details to appear in the final document.



# Business Value

This brings clear value both for Business Central customers and for partners working with them. Customers benefit from faster invoice template updates, less manual effort in document editing, and more accurate, consistently branded customer-facing documents. They can also save significant billable time by reducing up to eight hours of report creation to just a few clicks. The solution reduces dependence on technical resources and makes ongoing document maintenance after go-live much easier. For Business Central partners, the approach helps avoid delays during implementation, reduces scope creep around document customization, and enables faster responses to change requests. At the same time, it supports more scalable template delivery across multiple customers and improves project margins by reducing time spent on low-value development work.

# Before And After DocumentsCorePack

DocumentsCorePack fundamentally transforms document creation and maintenance in Dynamics 365 Business Central. By replacing developer-dependent, manual processes with a business-friendly, no-code approach, organizations can create, customize, and maintain professional documents faster, more consistently, and at a significantly lower cost.

| Before DocumentsCorePack                                               | With DocumentsCorePack                                                                                                                                            |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ❌ Invoice changes require developer support                            | Business users design layouts in Word                                          |
| ❌ Technical customization slows projects                               | No-code template changes accelerate delivery                                   |
| ❌ Related data is hard to include                                      | Business Central fields and relationships are available in the designer        |
| ❌ Product images and conditional text require workarounds              | Dynamic images and conditions can be added to templates                        |
| ❌ Manual edits create inconsistency                                    | PDFs are generated from live Business Central records                          |
| ❌ Post-go-live changes become support tickets                          | Templates can be reused and adjusted more easily                               |
| ❌ Increased delay in document delivery and edits due to IT involvement | Significant cost savings for customers through reduced developer dependency  |

## Example Customer Scenario

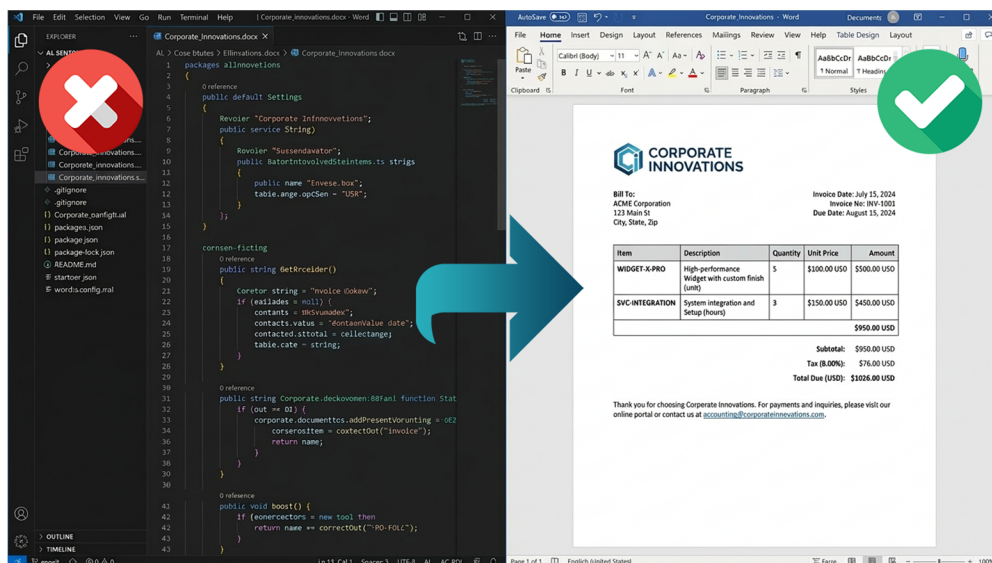
A wholesale distributor uses Business Central to manage sales invoices for customers across multiple regions. Its invoice requirements include customer billing details, shipping contact information, salesperson data, payment terms, VAT fields, product images, gross weight, and branded formatting.

Using DocumentsCorePack, the distributor creates a single dynamic invoice layout in Microsoft Word. The template pulls live invoice data from Business Central (1), repeats invoice lines automatically, displays product images, and shows payment instructions only when relevant (2). Finance users then generate polished PDF invoices directly from posted sales invoices in Business Central (3).



## Conclusion

DocumentsCorePack gives Business Central customers and partners a practical way to modernize document generation without adding unnecessary technical complexity. By moving invoice template design into Microsoft Word and connecting layouts directly to Business Central data, teams can create polished, accurate, and repeatable customer-facing documents with far less reliance on custom development.



For customers, this means significant cost savings with faster invoice creation, fewer manual edits, and a more consistent brand experience. For partners, it means fewer project delays, fewer post-go-live document change requests, and a more scalable way to deliver document automation across Business Central implementations.

The invoice workflow demonstrated in this use case is just one example of what becomes possible when document generation is embedded into the Business Central experience. The same approach can be extended to quotes, orders, confirmations, statements, reports, and other business-critical documents that need to combine ERP data, business logic, and professional presentation.



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All features and support included