



b4d Textmodule | Intelligent Text Control in Microsoft Dynamics 365

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In modern ERP systems such as Microsoft Dynamics 365 Supply Chain Management and Microsoft Dynamics 365 Finance, the consistent and accurate provision of information within documents plays a central role. Quotations, order confirmations, delivery notes, and invoices often contain recurring yet context-dependent content. The standard functionalities for advanced customer, vendor, and product notes provide a solid foundation for this purpose. In practice, however, they quickly reach their limits when content needs to be controlled not only at the master data level but also along specific business relationships.

The b4d Text Module extends this approach and enables precise, automated, and scalable text control within business processes.

Initial Situation & Challenges

Many companies face similar challenges when using standard note functionalities:

- Limited flexibility: Notes can only be assigned to individual master data (e.g., customer or product)
- Lack of context sensitivity: Combinations of customer, product, or other attributes can only be mapped to a limited extent
- High manual effort: Texts often need to be added or maintained manually
- Inconsistent communication: Content varies across documents and processes
- Limited scalability: Increasing variant diversity leads to complex and error-prone maintenance

These limitations directly impact efficiency, process quality, and the professionalism of customer communication.

Solution Approach: The b4d Text Module

The b4d Text Module extends the standard functionality with rule-based, context-dependent text control.

Unlike traditional note logic, texts are not managed in isolation but are controlled along specific business relationships. Various criteria can be combined, including:

- Customer and vendor accounts
- Products and product groups
- Countries and rebate groups
- Version dependencies

Document types and process steps

Texts are automatically provided in the relevant context and output in the corresponding documents.

Functionality and Key Features

Enhanced Note Logic

The module enables the definition of notes on:

- Header level (e.g., general contract or delivery terms)
- Line level (e.g., product-specific notes)

Control is achieved via combinable selection criteria such as account code, account relationship, product code, and product relation.

Context-Based Control

A key added value lies in the ability to output texts based on specific combinations, such as:

- Customer + Product
- Customer + Country
- Product + Version

This ensures that content appears exactly where it is relevant from a business perspective.

Document- and Process-Dependent Control

Notes can be activated specifically for certain document types, including:

- Quotations and order confirmations
- Delivery notes and picking lists
- Invoices and free text invoices
- Purchase orders and product receipts

Additionally, texts can be controlled based on:

- Time intervals (from/to date)
- Internal or external usage

Position within the document (before/after header or line)

Automation in Operational Processes

When creating a sales order or purchase order, relevant notes are automatically retrieved and displayed in the system. Users immediately recognize this:

- On header level via corresponding indicators
- Online level via highlighted rows

The notes can then be reviewed, supplemented, or adjusted if necessary.

Functionality and Key Features

Combination of Automation and Flexibility

In addition to automatically generated notes, the module also supports free-text notes that can be:

- Created manually
- Edited
- Duplicated
- Applied to multiple lines simultaneously

This combines standardized automation with operational flexibility.

Multilingual Support and Formatting

Texts are maintained via an integrated HTML editor and can be:

- Structurally formatted
- Stored in multiple languages
- Output context-dependently

This enables consistent and professional communication in international business processes

Scalable Data Maintenance

For larger text volumes, the module offers integration with data management:

- Export and import via data entities
- Maintenance via Excel
- Support for extensive text content

These features enable efficient management even with high variant diversity.

Business Value

The use of the b4d Text Module leads to measurable improvements:

- Increased precision

Texts are displayed in the exact right context, reducing misunderstandings.

- Reduced manual effort

Recurring content is automatically provided and does not need to be maintained multiple times.

- Consistent communication

Uniform content across all documents strengthens professionalism towards customers and suppliers.

- Higher process reliability

Automated rules minimize errors and improve document quality.

- Scalability

Even complex requirements and large data volumes can be managed in a structured way.



Positioning within the System Landscape

The b4d Text Module is not a classic document management or output management system. Instead, it complements these solutions by intelligently controlling content within documents.

This positions the module as:

- a central logic layer for context-dependent document content within Dynamics 365

Conclusion

The b4d Text Module significantly extends the standard functionality of Dynamics 365 and introduces a new level of quality in managing document content.

By combining:

- rule-based logic
- context-dependent control
- automated provisioning
- and flexible maintenance
- a simple note function evolves into a powerful tool for modern business processes.

The result: greater efficiency, higher data quality, and consistent, professional communication across all relevant documents.

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www.b4dynamics.com

