Configuration & Administration

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- Freeze Storage
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- Additional search queries

Permission sets

In order to use the modules, the appropriate authorization set must be assigned to the respective users.

The following are supplied with:

- DXP Core Admin - DEXPRO Core Administrator
- DXP Core User - DEXPRO Core User
- DXP FREEZE Admin - DEXPRO FREEZE Administrator
- DXP FREEZE User - DEXPRO FREEZE User

DEXPRO Core

The DEXPRO Core manages the individual DEXPRO apps and their documents per client.

All documents that have been entered and processed via the various DEXPRO modules in Microsoft Dynamics 365 Business Central are displayed. A global number series, which is used across all DEXPRO apps, is used to track individual documents. This offers the advantage that users only have to work with one number series per document.

Further information can be found here.

Freeze Setup

In the FREEZE setup, both the connection to the Freeze Archive System and the processing within the app are set up.

Menu

Home

Copy Setup

This is used to copy the setup to another company.

Upload Placeholder

This function is used to upload a placeholder for file types that the PDF viewer cannot display.

Navigation

Document Class Setup

This menu item takes you to the setup for the document classes.

OAuth 2.0-Setup

The users and their access tokens for OAuth 2.0 authentication are managed in this menu item.

User Setup

You can access the user assignment to the OAuth users via this menu item.

Additional Search Queries

Setting up additional search queries is particularly useful if you want to display archive folders that have not been archived via Freeze in BC. However, there are also other use cases.

FastTabs

General

You can activate/deactivate the use of this app in this FastTab.

API

The URL of the FREEZE system is specified in this fast tab. The default archive storage and the default authentication are also stored. You can also specify here how many archive data records should be displayed simultaneously during searches.

API

URL ·

Default Authentication · ⌄

Default Store ···

Records per page · 15

Archiving

Settings can be made here as to what should be archived automatically.

Archiving

General

Archive Attachments · · · · ⬤

Archive Incoming · · · · · · ⬤

Archive Email & Attac... · · ⬤

Purchasing

Archive after Posting · · · · ⬤

Sales

Archive after Posting · · · · ⬤

Archive Outgoing · · · · · · ⬤

General Journal

Archive after Posting · · · · ⬤

Automatic archiving after posting a receipt. Printing and archiving in one step. Archiving of emails with attachments if they are sent via the BC Email module.

Freeze Storage

The archive memories of the connected Freeze System are managed here.

Freeze Stores			Saved

Manage

Name ↑		Description	API Link
→ store-01	⋮	Store 1	https://eas-dexpro-dev-01.frz-01.public-02.f...
store-02		Store 2	https://eas-dexpro-dev-01.frz-01.public-02.f...
store-03		Store 3	https://eas-dexpro-dev-01.frz-01.public-02.f...

Document Class Setup

In the document class setup, the mapping between the respective document class and your export interface is done. Furthermore, the field mapping of each document class is downloaded here, creating a set of standard fields and their usage in Microsoft Dynamics 365 Business Central.

The document class setup is cross-app and is managed via the DEXPRO Core.

Process
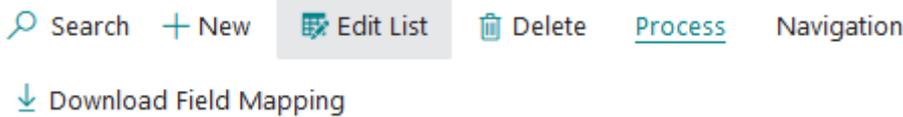
Download field mapping

This downloads the field structure of the SQUEEZE document class. These are needed for the metadata mapping.

Navigation
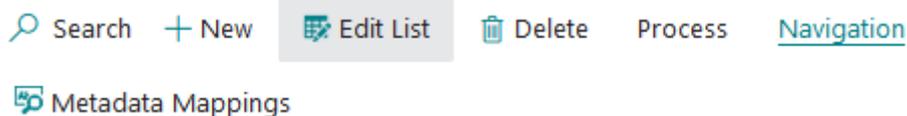
Metadata mapping

Via this menu item you reach the metadata mapping. This defines which fields are to be transferred to Microsoft Dynamics 365 Business Central and how.

List

Document classes

This overview lists all the document classes that have been set up.

Card

Document class

Here, each document class is set up individually.

General

In this fastab the name of the document class, the next process step, as well as the automatic enrichment of the positions is set up.

Freeze

The standard search mask is defined here.

User Setup

	User Name		Show all results	Alternative Authentication Code
→	KOEPKE	⋮	☑	

Alternative authentication: If users are to access the archive with alternative authentication, this can be entered here.

Show all results: The additional search queries (just like the full text search) only provide results for users who have been explicitly authorized to do so. This is necessary because archive folders that have not been archived via BC cannot be checked for effective authorizations due to the lack of a table number.

OAuth 2.0 Setup

The OAuth 2.0 / Open Id users and their access tokens are managed here.

Open ID Setup Entries

Additional search queries

Creation of additional search queries

Below I have created a query that is appended to the system search query when you open Freeze via a record (here: vendor items - table 25). *Search queries with the same table number are OR-linked.*

Creation of additional search queries

You can access the query lines via **Related**:

Search by field name - Specifies the value of the field name to be used for the search query. These are the native fields of the archive software, but also data record fields saved in any form:

Search value source (field no.) - Specifies the value to be searched for in combination with the field name.

Fixed search value - The fixed search term is used instead of the search value.

The query lines are AND-linked.

Show the result

If you then open the vendor item Freeze...

K00170 · Media-Hannes

Kreditorenposten | 🔍 Suchen | ⬤ Analysieren | 📑 Liste bearbeiten | Start | Posten | DEXPRO Freeze | Weitere Optionen

📑 Freeze öffnen

Buchungsd... ↓		Belegdatum	Belegart	Belegnr.	Externe Belegnummer	Kreditorennr. ↓ ▼	Kreditorenname	Beschreibung
07.03.2024		07.03.2024	Zahlung	GEKRECH108001		K00170	Media-Hannes	Media-Hannes
→ 07.03.2024	⋮	13.07.2023	*Rechnung*	*GEKRECH108043*	R308154_PAYMENTTEST1	K00170	Media-Hannes	Rechnung EKRECH1065

...you will get the desired search result:

Freeze Suchergebnis - Kreditorenposten: 3459 - Seite 1/1

Start **Navigation**   ◉

◀ Vorherige Seite   ▶ Nächste Seite   ⚡

Allgemein

Speicher .... Store 1   Datensätze (Mappen... [20]
Ergebnisse   1   Aufsteigende Sortier... ⬤

Zusätzliche Filter

Suchbegriff .... [   ]   **Datum**
                                           Filterziel .... [Bezugsdatum   ▼]
                                           Vom .... [📅]
                                           Bis .... [📅]

Datensätze (Mappen) 🗐 Historie anzeigen   ↗ ⤢

	Bezeichnung	Typ	Archiviert am ↓	Archiviert von (Anmeldename)	Version
→	Einkaufsrechnungskopf: GEKRECH108043 ⋮	Rechnungen	26.03.2024 13:46	service-account-bc-test-bernd	0

PDF-Anhänge   ↗ ⤢

	Dateiname ↑		Archiviert am	Author
→	6602bac70d749465778116.pdf	⋮	26.03.2024 13:46	BERND.FEDDERSEN

PDF Vorschau

▦ 🔍 | 1 von 1 | — + | I ✎ | »

MEDIA-HANNES

Rechnung

Alle Anhänge ∨

Dateiname ↑		Archiviert am
6602bac70d749465778116.pdf	⋮	26.03.2024 13:46
JSON verarbeitet.json		26.03.2024 13:46

Do not forget: The additional search queries (just like the full text search) only provide results for users who have been explicitly authorized to do so in the setup. This is necessary because archive folders that have not been archived via BC cannot be checked for effective authorizations due to a lack of table numbers.