



GS513 – Business Document Management (BDM) in Globalization Studio

One of the most common requests from finance, sales, and operations teams is:

“Can we change this invoice layout? Just add a logo... remove a column... maybe move the footer?”

Previously, this required developers to update SSRS reports or ER format files. But with **Business Document Management (BDM)**, business users can now make these changes directly in **Microsoft Word or Excel**, without any coding.

In this article, you’ll learn:

- What BDM is and what formats it supports
- Which documents you can customize
- How BDM connects to Globalization Studio and Electronic Reporting (ER)
- How to use your own templates
- Setup prerequisites, security roles, and tips
- A real-life demo: Sales Invoice in Excel
- Best practices and versioning

This article builds on [GS504 – Feature Lifecycle](#) and [GS509 – ER Basics](#).

What Is Business Document Management?

Business Document Management (BDM) is a no-code tool in Dynamics 365 Finance and Supply Chain Management that allows users to:

- Modify document templates using **Microsoft Word or Excel**
- Manage visual layouts of **customer-facing documents** (e.g., invoices)
- Use **Electronic Reporting (ER)** to map system data to the document layout

Supported Output Formats:

- **Microsoft Word (.docx)** – for documents like invoices, POs, and quotations
- **Microsoft Excel (.xlsx)** – typically used for tabular financial layouts
- **PDF** – generated as output from Word or Excel layouts (not edited directly)



- **Other formats** (XML, TXT, JSON) – available only via traditional ER Designer, not BDM

■ Official Docs: [Business document management overview – Microsoft Learn](#)

What Documents Can You Edit?

You can use BDM to customize the layout of any **configurable business document** enabled by ER. Common examples include:

- Customer sales invoice
- Purchase order confirmation
- Free text invoice
- Sales quotation
- Project quotation
- Collection letter note
- Packing slip
- Request for quotation (RFQ)

■ Microsoft reference: [Configurable business documents – Microsoft Learn](#)

These documents are delivered via the Global repository and rely on ER formats (Word or Excel) and data models.

Prerequisite Configuration

Before using BDM, ensure the following is configured:

Requirement	Description
Enable BDM feature	Go to Feature management and enable Business Document Management
Office integration setup	Ensure Office add-ins for Word and Excel are working. These are required to open and save templates in BDM
Electronic Reporting (ER)	Ensure ER is fully configured, including Data model , Model mapping , and Format configuration



Requirement	Description
Global repository access	Make sure Globalization Studio or Regulatory Configuration Services (RCS) is enabled to import Microsoft templates
SharePoint document management connection 	Mandatory – Configure SharePoint document type storage to enable upload/download of templates for editing in Word/Excel. This is where BDM stores documents temporarily during editing and publishing
Azure Rights Management (optional)	Needed if you want to apply protection policies on generated documents

Security Roles

To access and work with BDM, assign the following roles:

Role	Purpose
Electronic reporting developer (ElectronicReportingDeveloper)	Required to create and edit document formats
Electronic reporting functional consultant	Can manage document configurations and versions
Business document manager (BusinessDocumentManagementUser)	Role to access the BDM workspace and edit layouts
System administrator	Required to assign security roles and feature enablement

 Roles are additive. A power user may have both functional and developer roles in non-production environments.

How BDM Fits into Globalization Studio

BDM is part of the broader **Globalization Studio** ecosystem. It layers on top of **Electronic Reporting** and connects to a **Feature** that drives document generation.

Element	Role
ER Model & Mapping	Defines what data is available
ER Format (Word/Excel)	Controls how the document appears



Element	Role
Globalization Feature	Triggers the output via processing pipeline
BDM Editor	Word/Excel used to change layout

Step-by-Step Demo: Sales Invoice in Excel

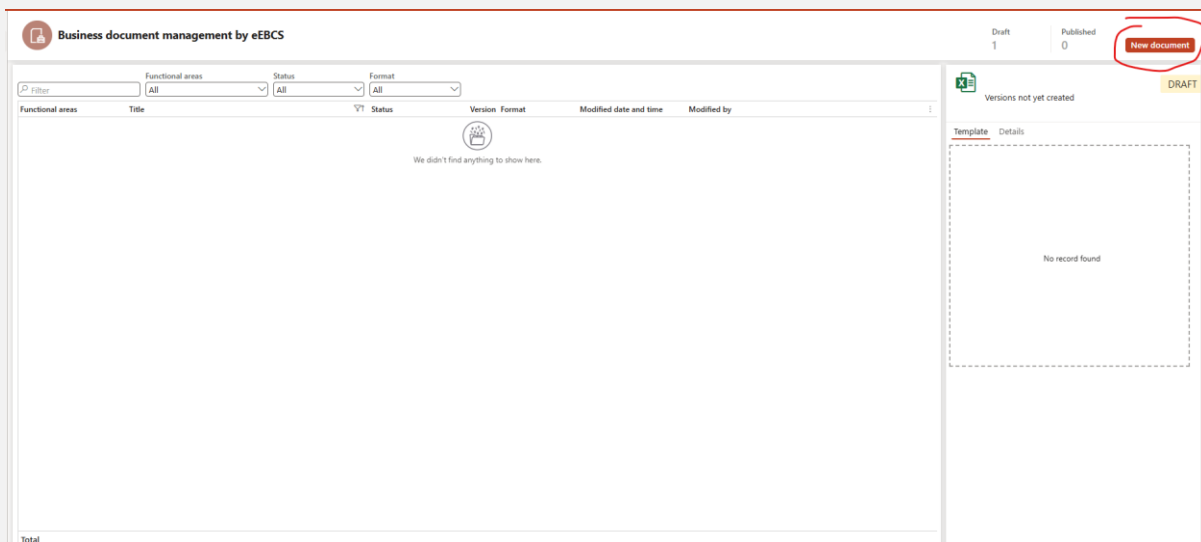
Let's say your UK finance team wants to:

- Add a company logo
- Change footer text
- Remove internal-only fields

Here's how to update the sales invoice using BDM:

☒ Step 1: Access the BDM Workspace

- Go to **Workspaces > Business Document Management > +Add New Document**



- Select **Customer sales invoice (Excel or Word)**



Create a new template

Select:

Annotations:

- Upload:** Upload a custom layout file (Word or Excel) from your local device into BDM. Use this to bring your own template or revised version of an existing document.
- Import from Dataverse repository:** Pull Microsoft-delivered or organization-shared templates from the connected Dataverse configuration repository. Essential for loading standard templates like Sales invoice or Purchase order.
- Synchronise:** Refresh the list of available document configurations by syncing with the Dataverse repository. This ensures you see the latest available formats published by Microsoft or your organization.
- Sales invoice (Excel):** Represents a template definition (e.g., Sales Invoice Excel) that can be opened, edited, and published using BDM. Each row includes metadata like provider (Microsoft), location (Dataverse), and applicable country/region.

Configuration name	Description	Configuration provider	Location	Country/region codes	GUID
Sales invoice (Excel)		Microsoft	Dataverse		{C38FA776-42D1-4C09-9...

✓ Step 2: Download the Template

- Choose the latest version of the invoice

Create a new template

Select:

Synchronise Last synchronisation: 28/07/2025 19:59:24

Configuration name	Description	Configuration provider	Location	Country/region codes	GUID
Sales invoice (Excel)		Microsoft			

Confirmation Dialog:

Are you sure you want to import the latest version of the 'Sales invoice (Excel)' configuration and recursively all its parent configurations as well as related to it configurations from the repository?

2

1



Finance and Operations

Search for a page

Standard view

Create a new template

Select Upload Import from Dataaverse repository

Synchronise Last synchronisation: 28/07/2025 19:59:24

Configuration name	Description	Configuration provider	Location	Country/region codes	GUID
Sales invoice (Excel)		Microsoft	Dataaverse		(C98FA776-42D1-4C09-9...

Display name of the template you are creating. This is what users will see in the BDM template list. Make it clear and descriptive (e.g., "UK Sales Invoice Layout v2").

Internal version name of the document template version. This is used for version control and tracking inside the ER framework. Should be short and meaningful (e.g., "v2_LogoAdded").

Optional notes or remarks for audit or documentation purposes. Pre-filled by the system, it helps others understand why this template version was created (e.g., based on which version or for what purpose).

OK Cancel

- Click **Edit in Excel**

Business document management by eBCS

Draft 2 Published 0 New document

UK Sales Invoice Layout v2 DRAFT

Active version: 1
Active version not validated

Template Details Versions

Sales invoice

[Your Company Name]

Company Address

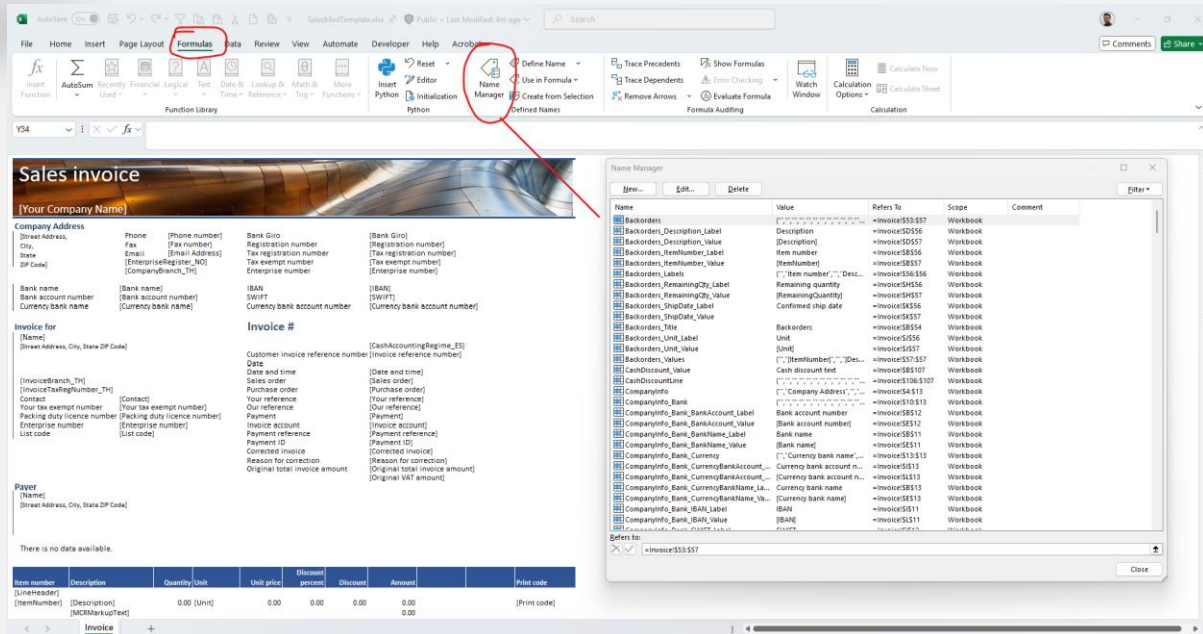
[Street Address] [Phone] [Phone number]
[City] [Fax] [Fax number]
[State] [Email] [Email Address]
[ZIP Code] [Company/branch ID]

Bank name [Bank name]
Bank account number [Bank account number]
Currency bank name [Currency bank name]

Invoice

Delete Edit Publish

- Excel opens with placeholders and named content controls (ER tags)



Step 3: Make Your Changes

- Insert a logo image
- Delete unnecessary columns
- Update the footer
- Use named fields to keep data-binding intact

ER fields look like @InvoiceDate or @SalesId – don't delete unless unused.

Sales invoice

[Your Company Name]



Company Address			
[Street Address, City, State ZIP Code]	Phone [Phone number] Fax [Fax number] Email [Email Address] [EnterpriseRegister_NO] [CompanyBranch_TH]	Bank Giro Registration number Tax registration number Tax exempt number Enterprise number	[Bank Giro] [Registration number] [Tax registration number] [Tax exempt number] [Enterprise number]
Bank name Bank account number Currency bank name	[Bank name] [Bank account number] [Currency bank name]	IBAN SWIFT Currency bank account number	[IBAN] [SWIFT] [Currency bank account number]

Invoice for	Invoice #
[Name] [Street Address, City, State ZIP Code]	[CashAccountingRegime_ES] Customer invoice reference number [invoice reference number]
[InvoiceBranch_TH] [InvoiceTaxRegNumber_TH] Contact Your tax exempt number Packing duty licence number Enterprise number List code	Date Sales order Purchase order Your reference Our reference Payment Invoice account Payment reference Payment ID Corrected invoice Reason for correction Original total invoice amount
[Contact] [Your tax exempt number] [Packing duty licence number] [Enterprise number] [List code]	[Date and time] [Sales order] [Purchase order] [Your reference] [Our reference] [Payment] [Invoice account] [Payment reference] [Payment ID] [Corrected invoice] [Reason for correction] [Original total invoice amount] [Original VAT amount]

Payer
[Name]
[Street Address, City, State ZIP Code]

There is no data available.

☒ Step 4: Change can be made through ER configuration

Navigation: < Back | Edit | + Create configuration | Delete | Designer | Validate | Run | Exchange | **Configurations** | Options | ? Help

Main Tabs:

- Configuration repositories**: Upload all configurations into repository
- Advanced settings**: User parameters
- Labels**: Export labels from all configurations
- Application specific parameters**: Setup
- Create configuration**: Set new base

Filter: Sales invoice (Excel)

UK Sales Invoice Layout v2

My view Configurations

Name	Description	Country/region codes	Configuration provider
UK Sales Invoice Layout v2	Created from Business docu...		eBES

Versions 277.55.1 | Initial version

+ Change status | Delete | Get this version | Compare with draft | Run | Rebase | Exchange | Upload into repository | Attachments

R.	Version	Status	Effective from	Supported until	Version created	Description	Base
	277.55.1	Draft			29/07/2025 17:57:35	Initial version	Sales invoice (Excel) 277.55

ISO Country/region codes

+ New | Delete

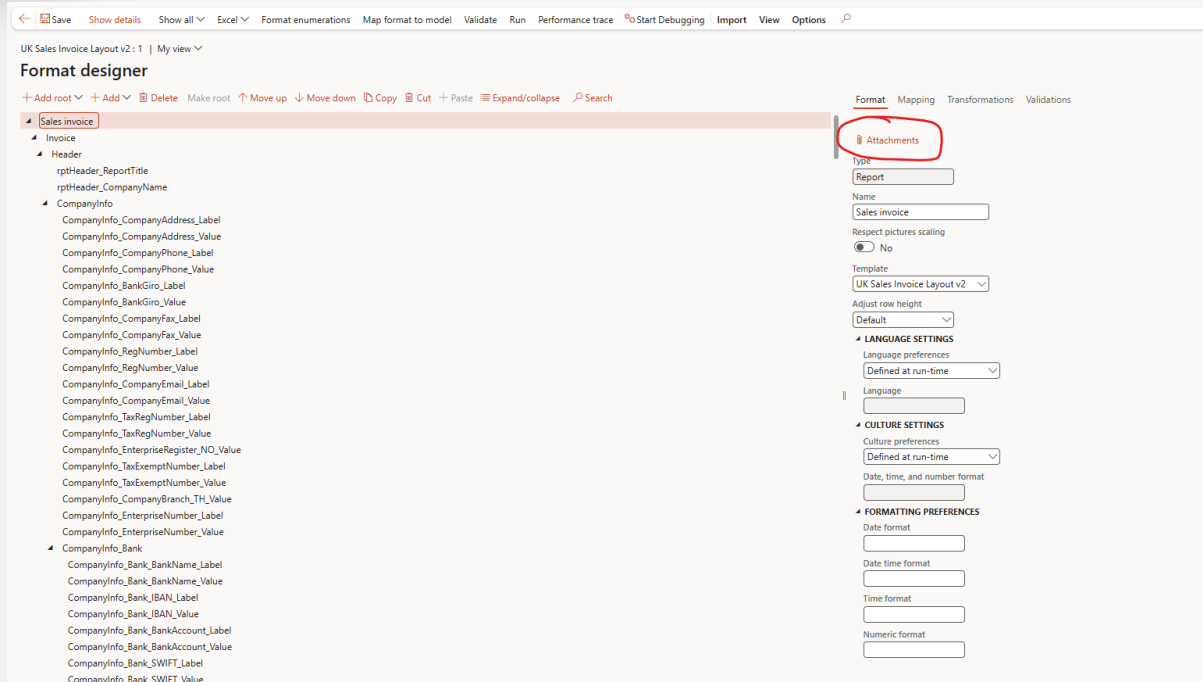
ISO	Short name
We didn't find anything to show here.	

Configuration components

Type	Name	Derived	Version
Format	UK Sales Invoice Layout v2	✓	0

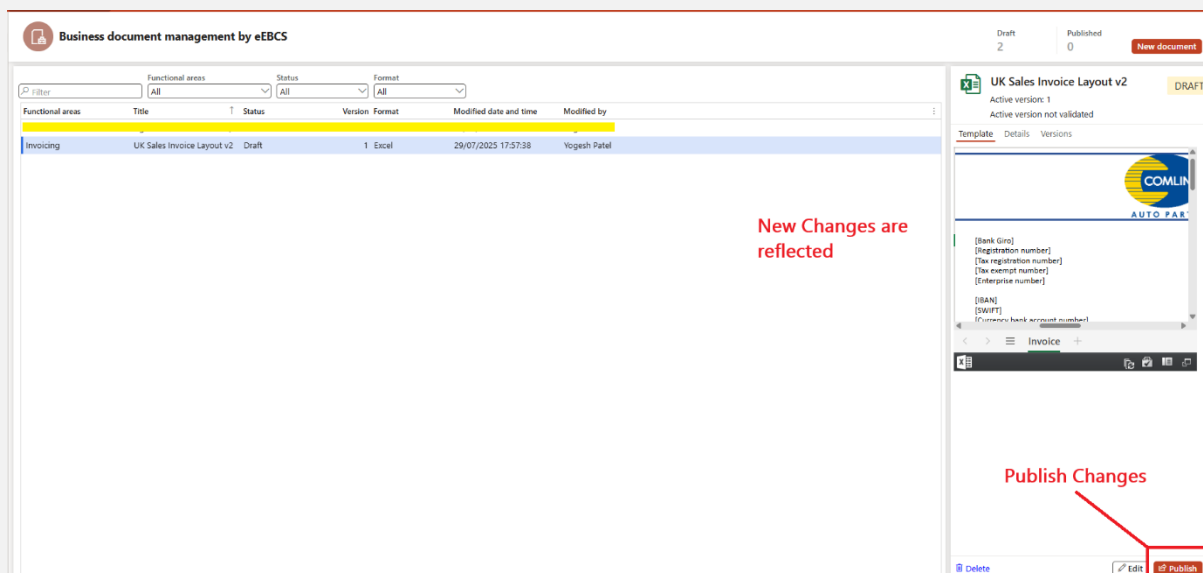


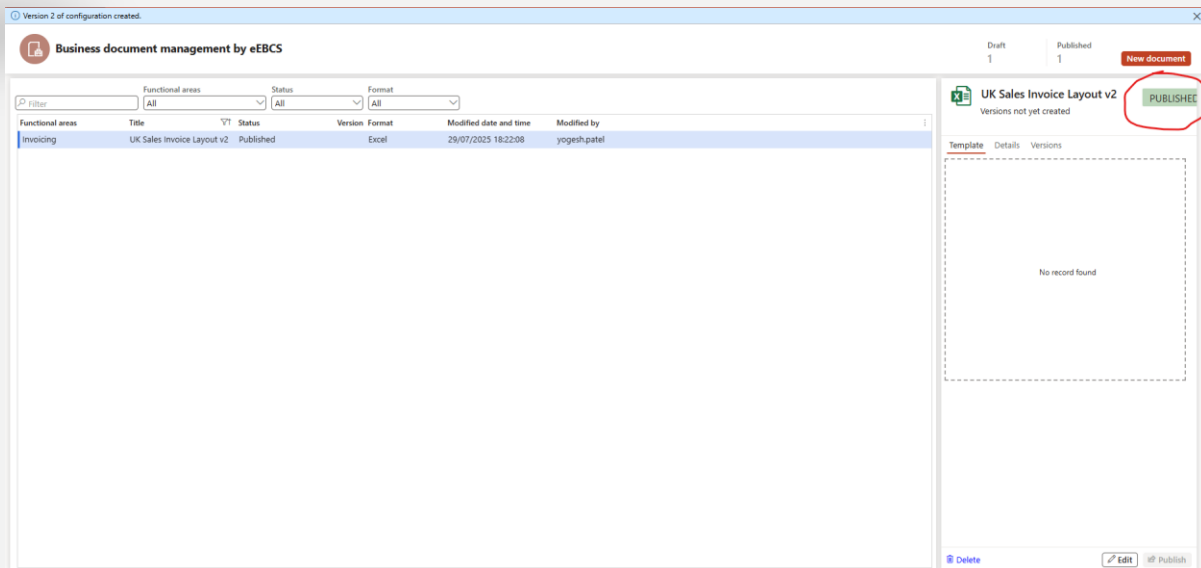
Format Designer



☑ Step 5: Upload and Publish

- Save your edited Excel file
- Return to BDM and **Upload** the layout
- Click **Publish** to activate it for use





Once published, the layout is used automatically on future posted invoices.

How to Bring Your Own Configuration and Use It with BDM

You can also **bring your own ER format and use it with BDM**. Follow this full process:

Step-by-Step

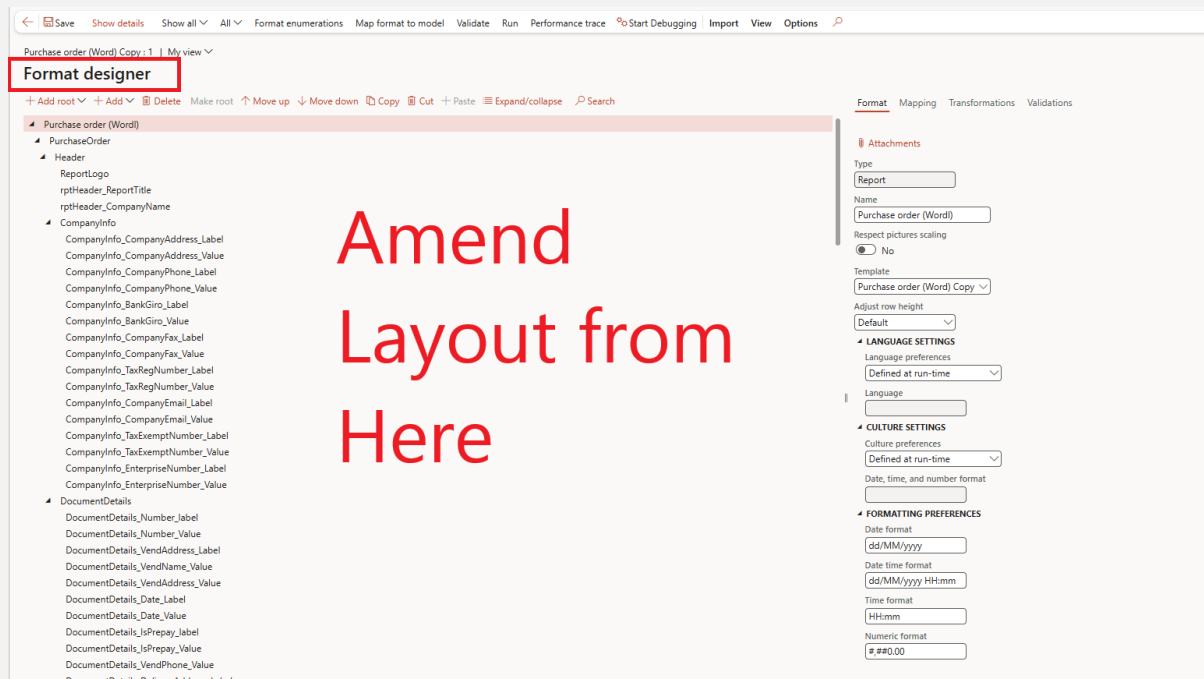
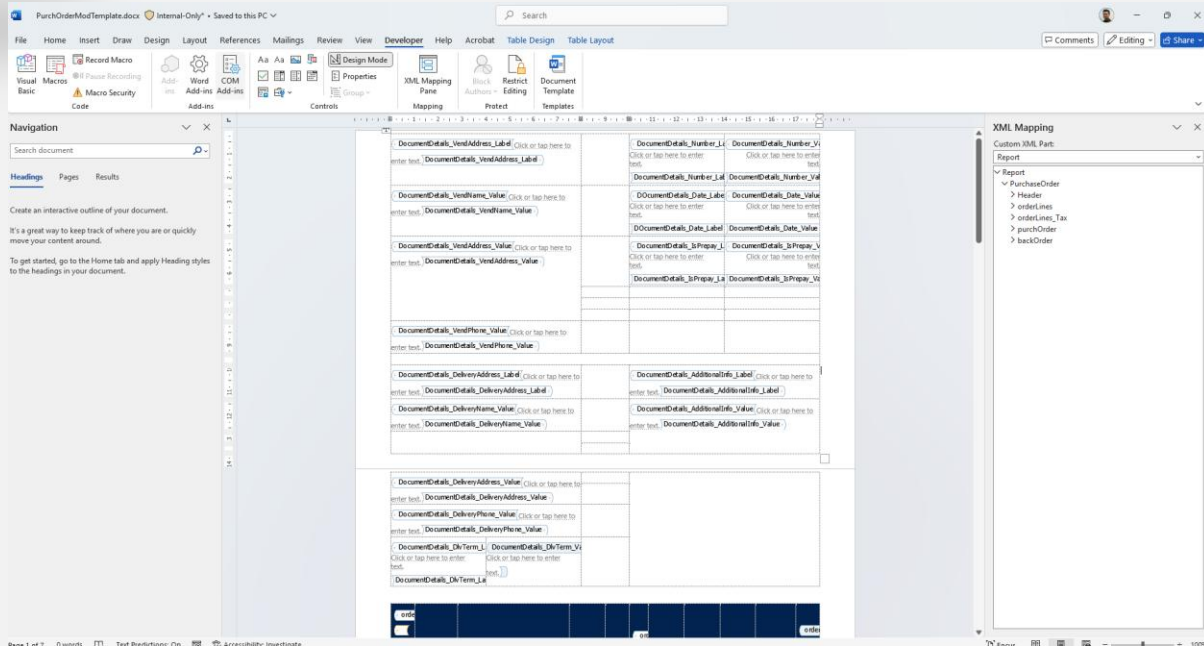
1. **Create or clone** an ER data model and model mapping
2. Create a new **Word or Excel-based ER format**
 - Format must be set to *Document type* = "Word" or "Excel"
3. Go to **Business document management > Configurations**
4. Select **Import** and choose your format
5. Add it to your **Feature configuration** inside Globalization Studio
6. Link this format in a **processing pipeline** step (Generate > Use Format)
7. Apply **applicability rules** (e.g., Doc type = Invoice, Country = GB)
8. Open the format in **BDM editor** and customize the layout
9. Test using sample transactions in Dev/UAT
10. Move through lifecycle states: *Draft* → *Complete* → *Published*

 Check Microsoft article explaining step by step process : Section **“Upload a template that uses an existing Excel workbook”**



Tips for Amending Word Document Layouts in BDM

Tip	Why It Matters
 Use Word's "Developer" tab	This shows content controls (gray placeholders) that are linked to ER fields.
 Don't delete content controls directly	If you remove a field like @InvoiceDate, it will not appear in the output. Use right-click > Remove Content Control only when the field is no longer needed.
 Insert logos and images using 'Insert > Picture'	Keeps layout stable and allows proper scaling. Avoid pasting or dragging images randomly.
 Use tables for layout alignment	Using Word tables gives better control over row/column structure. Avoid using tabs or spaces to align content.
 Use ER Format Designer to change properties	In Word-based templates , field labels, formats, and conditions must be edited in ER configuration , not in Word directly. This is different from Excel , where many display changes can be made inside the Excel file itself.
 Test using real data in UAT	Always test your edited layout with real transactions to ensure all fields render and calculate as expected.
 Keep versioned backups	Before uploading a new version, save a local copy with a clear name like SalesInvoice_UK_v3. This helps in rollback or auditing later.



Amend
Layout from
Here

BDM vs Traditional ER Designer

Feature	BDM (Excel/Word)	Traditional ER (Excel/XML)
Design Tool	Word/Excel	Designer UI or Excel
Friendly for business users	 Yes	 Requires developer skills



Feature	BDM (Excel/Word)	Traditional ER (Excel/XML)
Use Case	Printed/customer-facing documents	Structured exports (e.g., XML/JSON)
Customization Scope	Layout only	Layout + logic/data mapping

Best Practices

Tip	Reason
Clone Microsoft templates	Avoid overwriting delivered formats
Use separate templates per country	Helps localization and tax-specific layouts
Backup Word/Excel formats	Easy recovery from broken designs
Test in lower-tier environments	Avoid publishing untested layouts to PROD
Use content controls in Office	Ensures proper binding to ER fields

Related Articles

- [GS504 – Feature Lifecycle and Rules](#)
- [GS505 – Creating a Feature from Scratch](#)
- [GS509 – ER Basics](#)
- [GS512 – Version Control](#)

Coming Up Next

In [GS514 – Document Routing and Output Locations](#), we'll explain:

- How to route documents to SharePoint, Azure Blob, Email, or folders
- How to set up customer-specific layouts
- How to avoid common Print Management errors

 [Continue to [GS514](#) →]