



## GS514 – Managing Document Routing and Output Locations in Globalization Studio

After designing a document layout using **Business Document Management (BDM)** or **Electronic Reporting (ER)**, the next question is:

“Where should the document go once it’s generated?”

Should it be:

- Printed?
- Emailed to the customer?
- Stored in SharePoint or Azure?
- Submitted to a tax authority?

This article answers those questions.

You’ll learn:

- How to control document destinations
- How to route documents based on country, customer, or document type
- How routing is executed in Globalization Studio pipelines
- What is and isn’t possible when it comes to calling external services

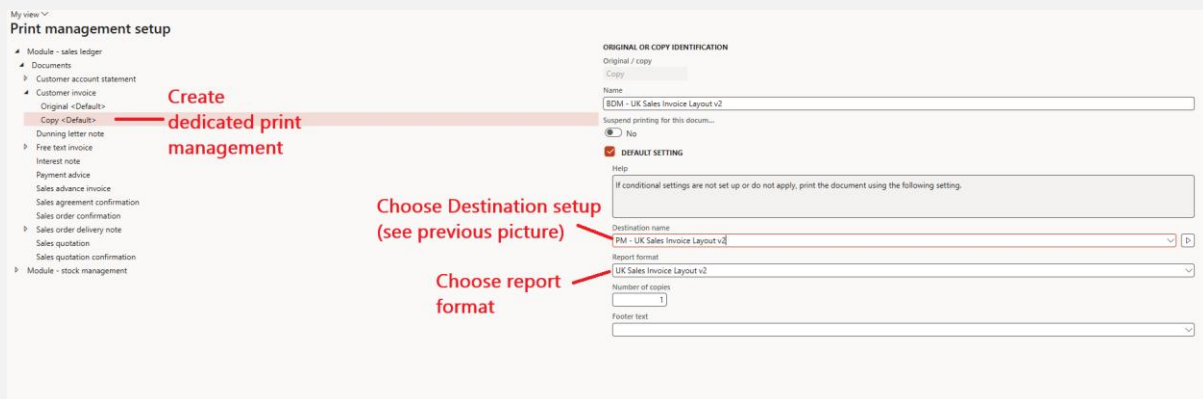
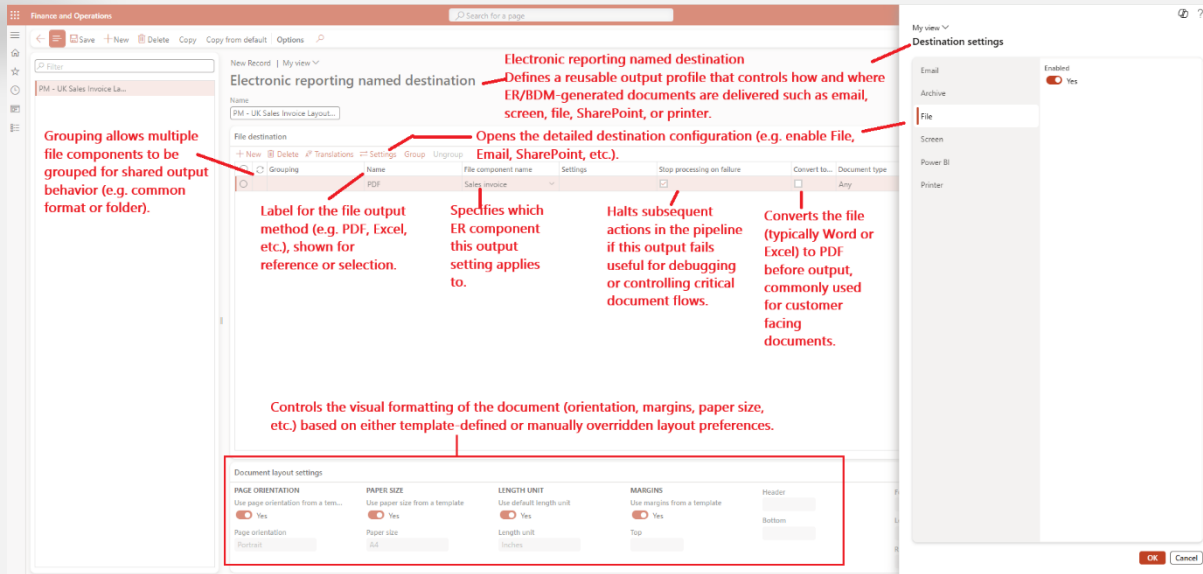
This builds on [GS506 – Pipelines](#) and [GS513 – Layouts with BDM](#).

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### What Is Document Routing?

**Document routing** controls where documents go after they are generated. Examples:

- Send to customer via email
- Store a PDF copy in SharePoint
- Submit XML to a government platform
- Print internally



In Dynamics 365, this can be done through:

- **Print Management** (for static, legacy routing)
- **Globalization Studio Pipelines** (for conditional, multi-step routing)

## Routing Options in D365

### Method

### Best For

#### Print Management

Simple, fixed output (e.g., always email invoices)

**Globalization Studio Pipelines** Country-specific or dynamic routing with multiple steps



## Example: Route Invoices by Country

Let's say:

- In the **UK**, invoices must be **emailed to the customer**

Please refer to the following community article for a detailed, step-by-step guide on configuring email and body content [ER: How to use Organization email templates when emailing configurable business documents](#)

- In **Italy**, they must be **submitted to the government portal (FACe)**

Italian FatturaPA (IT) 7: Sales invoice | Standard view

Feature version setup

Processing pipeline

Set up actions and parameters

Processing pipeline

Action	Action name	Description	Enable retry	Retry action	Export result	Update action
<input type="radio"/>	Get next number sequence value	Get next number sequence value				
<input type="radio"/>	transform document	generate format				
<input checked="" type="radio"/>	(Preview) Call Italian SDI service	Submit				
<input type="radio"/>	(Preview) Wait Italian SDI service	Wait for response				
<input type="radio"/>	Process response	Process response				

Parameters

Name	Description	Value
<input type="radio"/>	Certificates	Certificate chain needed for client authentication on web service. Client certificate should b...
<input type="radio"/>	Custom file name	Custom file name from the client
<input type="radio"/>	URL address	Web service address (endpoint)
<input type="radio"/>	Input file	The web xml data which will be sent to the web service via an http post input parameter.
<input type="radio"/>	Input file name	Input file name
<input type="radio"/>	Maximum backoff	Maximum of backoff rate for exponential calculation of retry intervals
<input type="radio"/>	Minimum backoff	Minimum of backoff rate for exponential calculation of retry intervals
<input type="radio"/>	Web request timeout	Defines maximum period of time (in milliseconds) which can be waited for web service resp...
<input type="radio"/>	Retry count	Maximum retry count of attempts to call webservice and retrieve response from web service

By enabling this action, you consent to share your data with external systems. Data imported from external systems into this Dynamics 365 online service is subject to the Microsoft privacy statement. Please consult the feature technical documentation for more information.

[Microsoft Privacy statement](#)

### GB UK Route – Static

- Use BDM to design PDF invoice
- Configure **Print Management**:
  - Destination = **Email**
  - Use %Email% token for the recipient address
- ☒ Done – email is sent when invoice is posted

### IT Italy Route – Automated

- Use Globalization Studio feature
- In the **processing pipeline**:
  - Generate XML** using ER
  - Digitally sign** the file
  - Integrate with FACe** using a **hardcoded action**



#### 4. **Store copy** in Azure Blob

This automation works because Microsoft provides a built-in action like Integrate with Edicom or Call Italian SDI service.

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### Can I Call My Own Web Service?

No , **not out-of-the-box**.

In the current product:

- The **pipeline step dropdown** only shows **hardcoded service actions** (e.g., Call SEFAZ, Integrate with ZATCA, etc.)
- There is **no generic “Submit” or “Send to web service”** action available

To call a **custom API/web service**, you must:

-  **Extend the Electronic Invoicing Add-in**
- Write a **custom action handler** in C#

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### Routing Setup in Globalization Studio

If using a pipeline:

#### ☒ Step 1: Add a Pipeline Step

- Go to **Feature > Setups > Processing Pipeline**
- Add action step like:
  - **Generate**
  - **Store**
  - **Sign**
  - **Call government service** (predefined)

There's no generic "submit/send" step, only predefined ones.

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#### ☒ Step 2: Add Applicability Rules

Add conditions to route differently per scenario:

Rule	Action
Legal entity = GB01	Store to SharePoint



Rule	Action
Country = IT	Call FACe portal (via predefined action)
Customer group = B2G	Generate XML and sign
Document type = FreeTextInvoice	Route to internal finance folder

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### ☒ Step 3: Combine with Print Management (Optional)

Use both methods:

- **Print Management** for simple print/email
- **Globalization Studio** for complex logic, storage, and government submission

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### Can I Route to Multiple Places?

Yes , within one pipeline, you can:

1. Generate document
2. Digitally sign (optional)
3. Email to customer
4. Store in Azure or SharePoint
5. Submit to authority (if supported)

Each step executes in order.

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### Where to Monitor Output and Failures

Use these tools to troubleshoot:

Tool	Purpose
<b>Submission History</b>	Track success/failure of each routing step
<b>ER Execution Logs</b>	View file contents, transformation, and errors
<b>Print Management Journal</b>	Legacy method for email/print audit trail

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## Tips for Output Management

Tip	Why It Helps
Use Azure or SharePoint for storage	Central, secure, and scalable
Test email delivery using tokens	Avoid issues like "email not found"
Use rules for country/legal entity	Simplifies international rollout
Don't rely on "Submit" for custom calls	Use Power Automate or custom extensibility

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## Related Articles

- [GS504 – Applicability Rules](#)
  - [GS506 – Pipelines and Storage](#)
  - [GS508 – ALM for Compliance Features](#)
  - [GS513 – Layouts with BDM](#)
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## Coming Up Next

In [GS515 – Digital Signatures and Key Vault Integration](#), we'll explore:

- Signing invoices and files
- Connecting D365 to Azure Key Vault
- Country-specific signing requirements

 [Continue to [GS515](#) →]