

ADP – Automated Document Processing Setup & User Handbook

This handbook describes how to set up and operate the ADP (Automated Document Processing) module for Microsoft Dynamics 365 Business Central in combination with DocuWare. It is intended for consultants, partners, and administrators who configure and operate the solution.

1. Overview

ADP is an extension for Microsoft Dynamics 365 Business Central that automates the analysis, classification, indexing, and routing of documents stored in DocuWare. It acts as an intelligent processing layer between DocuWare and Business Central.

2. Architecture

DocuWare collects and stores documents.

ADP processes documents using configurable process steps and AI services.

Business Central receives structured and decision-ready data for further processing.

3. Process Setup

Process Setup defines how documents are picked up and processed. Each process consists of a header and multiple setup lines defining execution steps.

4. PreProcess Configuration

The PreProcess step is typically responsible for picking up documents from DocuWare baskets and preparing them for further AI-based processing.

5. Mapping Lines

Mapping Lines define how documents are grouped, classified, indexed, clipped, and moved. Each line represents one processing action and can be enabled or disabled individually.

6. AI Model Configuration

AI behavior is configured via OpenAI Setup records. Different models can be used for classification, extraction, or validation tasks.

7. Debugging and Transparency

ADP provides logging and debugging options to ensure transparency and traceability of AI decisions and processing steps.

8. Typical Use Cases

- Automated invoice processing
- Classification of incoming documents
- Indexing and routing in DocuWare
- Preparation of purchase invoices in Business Central

9. Supported Environments

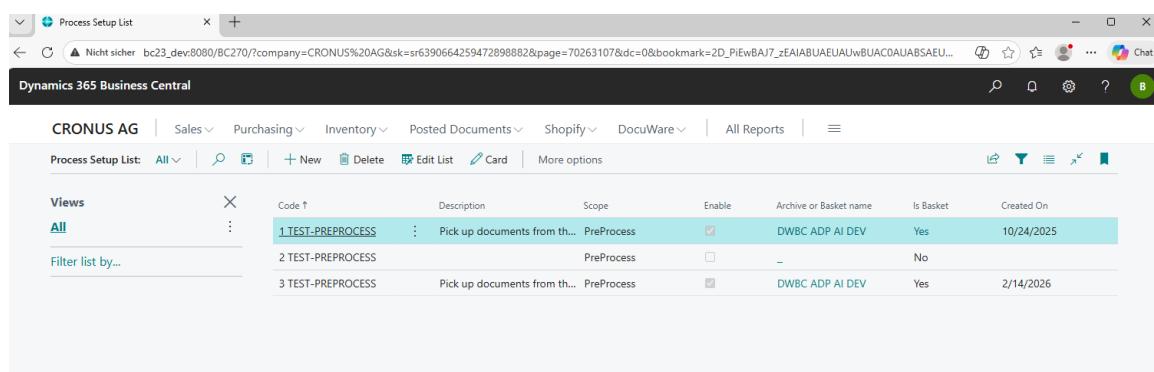
- Business Central Cloud
- Business Central On-Prem
- DocuWare Cloud and On-Prem

10. Summary

ADP enables scalable, transparent, and controlled automation of document processing, reducing manual effort while keeping full control over business logic.

Screenshots & Examples

The following screenshots illustrate typical configuration screens of ADP.



Views	Code	Description	Scope	Enable	Archive or Basket name	Is Basket	Created On
All	1 TEST-PREPROCESS	Pick up documents from th...	PreProcess	<input checked="" type="checkbox"/>	DWBC ADP AI DEV	Yes	10/24/2025
	2 TEST-PREPROCESS		PreProcess	<input type="checkbox"/>	-	No	
	3 TEST-PREPROCESS	Pick up documents from th...	PreProcess	<input checked="" type="checkbox"/>	DWBC ADP AI DEV	Yes	2/14/2026

3 TEST-PREPROCESS

▶ Run  Actions  Fewer options

Allgemein

Code	<input type="text" value="3 TEST-PREPROCESS"/>	Is Basket	<input type="text" value="Yes"/>
Description	<input type="text" value="Pick up documents from the in-tray"/>	Max. number of document...	<input type="text" value="20"/>
Comment	<input type="text" value="Picks up the documents from the in-tray"/>	Max. number of document...	<input type="text" value="10"/>
Scope	<input type="text" value="PreProcess"/>	Source Code	<input type="text" value="T1"/>
Enable	<input type="checkbox"/>	Created On	<input type="text" value="2/14/2026"/> 
Basket or Archive name	<input type="text" value="DWBC ADP AI DEV"/>		

Setup Lines       

Enable	Object Type to Run	Object ID to Run	Object Caption to Run	Comment
<input type="checkbox"/>	<input type="text" value="Codeunit"/>	<input type="text" value="70263102"/>		<input type="text" value="Your Comment"/>

Dynamics 365 Business Central

OpenAI Setup | Work Date: 9/29/2027

GPT-5.2

Test Prompt Open Testfiles Open Usage Entries Copy Setup

General

Code	GPT-5.2	System Prompt	You are an AI assistant special...
API Endpoint	https://api.openai.com/v1	Reasoning Effort	Low
Model	gpt-5.2	Text Verbosity	Low
Max Tokens	512	TimeOut (seconds)	50
Retry Max Tokens	1024	Retry Attempts	0
Temperature	0.10	Retry Countdown (Seconds)	10
API Key	AI Entry Group Method	Daily

Test Data

Test Setup

User Prompt	Gib mir einen Satz auf Polnisch...	Usage Statistics	
Test Tracking Source Code	1A	Used Input Tokens	49
Use Testfiles	On	Used Output Tokens	509
Count of Testfiles	2	Total Used Tokens	558
Count of Enabled Testfiles	1	Processing Time (Seconds)	10.01
Comment	...	Number of Attempts	1
Comment 2	...	Used Verbosity	low

Internal Retries & Delays

File Upload – Init Retry Attempts File Upload – Complete Retry Attempts



Setup Lines | New Line Delete Line Mapping Line Up Line Down

Enable	Object Type to Run	Object ID to Run	Object Caption to Run	Comment
→ <input checked="" type="checkbox"/>	Codeunit	70263102		Your Comment

Mapping Lines PreProcess

✓ Saved

Line Type: Group Documents

Archive or Basket Fieldname: E-Mail-Adresse (Absender)

Document Scope: Both (Main and Additional)

Condition: type IN ("Invoice", "Credit note")

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Group Documents

Archive or Basket Fieldname: E-Mail Betreff

Document Scope: Both (Main and Additional)

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Group Documents

Archive or Basket Fieldname: E-Mail Empfangsdatum

Document Scope: Both (Main and Additional)

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Group Documents

Archive or Basket Fieldname: E-Mail Größe

Document Scope: Both (Main and Additional)

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Classify Documents (AI)

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Both (Main and Additional)

Condition: type IN ("Invoice", "Credit note")

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Index Documents (AI)

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Both (Main and Additional)

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Index Documents (AI)

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Main documents only

Condition: type IN ("Invoice", "Credit note")

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Clip Documents

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Main documents only

Condition: type="Error"

Min. Confidence: 0.60

Comments: Combines the related documents

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Clip Documents

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Main documents only

Condition: type="Invoice"

Min. Confidence: 0.60

Comments: Move the documents to the next outbox

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC 2026 DEV

Document Scope: Main documents only

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: Move the documents to the archive

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP AI DEV WERBUNG

Document Scope: Main documents only

Condition: type="Advertisement"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP AI DEV WERBUNG

Document Scope: Main documents only

Condition: type="Newsletter"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP DEV MANUELL

Document Scope: Main documents only

Condition: type="Email"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP DEV MANUELL

Document Scope: Main documents only

Condition: type="Service"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP AI DEV WERBUNG

Document Scope: Main documents only

Condition: type="Other"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP DEV MANUELL

Document Scope: Main documents only

Condition: type="Invoice"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP DEV MANUELL

Document Scope: Main documents only

Condition: type="Credit Note"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Line Type: Move Documents

Archive or Basket Fieldname: DWBC ADP AI DEV ERROR

Document Scope: Main documents only

Condition: type="Error"

Min. Confidence: 0.60

Comments: All that remains

Attach E-Mail as Last Document:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Group attachments per email:

Find related documents:

Mapping Lines PreProcess

✓ Saved

Mapping Details

OpenAI Setup

System Prompt: You are an AI assistant specialized in a...

User Prompt: Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "...

Retry Attempts: 0

TimeOut (seconds): 0

Reasoning Effort: Low

Text Verbosity: Low

Max Tokens: 512

Retry Max Tokens: 2500

Comment:

OpenAI Setup

System Prompt: You are an AI assistant specialized in a...

User Prompt: Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "...

Retry Attempts: 1

TimeOut (seconds): 120

Reasoning Effort: Low

Text Verbosity: Low

Max Tokens: 2500

Retry Max Tokens: 2500

Comment:

OpenAI Setup

System Prompt: You are an AI assistant specialized in a...

User Prompt: Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "...

Retry Attempts: 1

TimeOut (seconds): 120

Reasoning Effort: Low

Text Verbosity: Low

Max Tokens: 1500

Retry Max Tokens: 2500

Comment: