

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

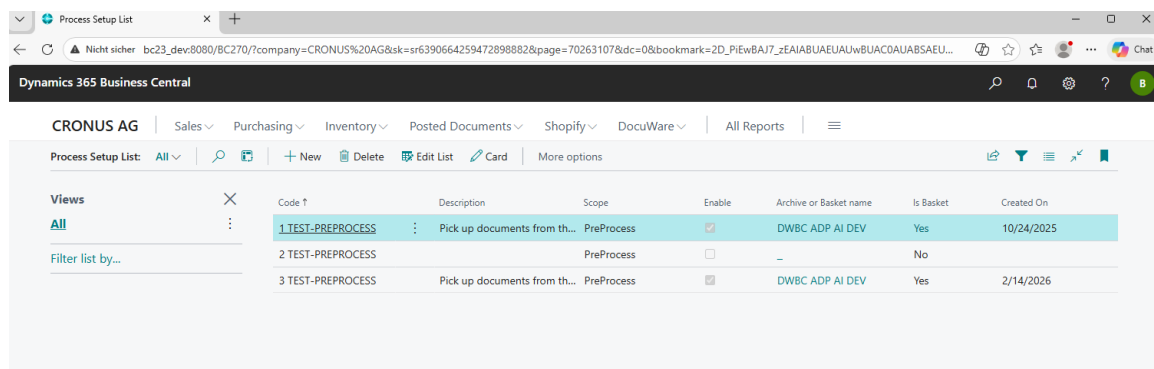
- Business Central Cloud
- Business Central On-Prem
- DocuWare Cloud and On-Prem

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.



Code	Description	Scope	Enable	Archive or Basket name	Is Basket	Created On
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 OpenAI Setup | Actions ▾ Related ▾ Fewer options

Allgemein

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

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"/>	<div>⋮</div> Codeunit	70263102		Your Comment

Dynamics 365 Business Central

OpenAI Setup | Work Date: 9/29/2027

GPT-5.2

Test PromptOpen TestfilesOpen Usage EntriesCopy Setup

General

CodeGPT-5.2

API Endpointhttps://api.openai.com/v1

Modelgpt-5.2

Max Tokens512

Retry Max Tokens1024

Temperature0.10

API Key*****

System PromptYou are an AI assistant special...

Reasoning EffortLow

Text VerbosityLow

TimeOut (seconds)50

Retry Attempts0

Retry Cooldown (Seconds)10

AI Entry Group MethodDaily

Test Data

Test Setup

User PromptGib mir einen Satz auf Polnisc...

Test Tracking Source Code1A

Use Testfiles

Count of Testfiles2

Count of Enabled Testfiles1

Comment

Comment 2

Usage Statistics

Used Input Tokens49

Used Output Tokens509

Total Used Tokens558

Processing Time (Seconds)10.01

Number of Attempts1

Used Verbositylow

Used temperature1.00

Internal Retries & Delays

File Upload – Init Retry Attempts

File Upload – Complete Retry Attempts

Setup Lines

New LineDelete LineMappingLine UpLine 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

+ New

Edit List

Delete

Line Up

Line Down

Mapping Details

Fields for Indexing

Enable	Line Type	Basket or Archive name	Archive or Basket Fieldname	Document Scope	Condition	Min. Confidence	Attach E-Mail as Last Docs...	Comments
→ <input checked="" type="checkbox"/>	Group Documents	DWBC 2026 DEV	E-Mail-Adresse (Absender)				<input type="checkbox"/>	Group attachments per email
<input checked="" type="checkbox"/>	Group Documents	DWBC 2026 DEV	E-Mail Betreff				<input type="checkbox"/>	Group attachments per email
<input checked="" type="checkbox"/>	Group Documents	DWBC 2026 DEV	E-Mail Empfangsdatum				<input type="checkbox"/>	Group attachments per email
<input checked="" type="checkbox"/>	Group Documents	DWBC 2026 DEV	E-Mail Größe				<input type="checkbox"/>	Group attachments per email
<input checked="" type="checkbox"/>	Classify Documents (AI)						<input type="checkbox"/>	Find related documents
<input checked="" type="checkbox"/>	Index Documents (AI)	DWBC 2026 DEV		Both (Main and Addition...	type IN ("Invoice", "Credit note")		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Index Documents (AI)	DWBC 2026 DEV			type IN "Credit Note"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Clip Documents			Main documents only	type IN ("Invoice", "Credit note")	0.60	<input checked="" type="checkbox"/>	Combines the related documents
<input checked="" type="checkbox"/>	Clip Documents				type="ERROR"		<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC 2026 DEV			type="Invoice"	0.60	<input type="checkbox"/>	Move the documents to the next outbox
<input checked="" type="checkbox"/>	Move Documents	DWBC 2026 DEV			type="Credit Note"	0.60	<input type="checkbox"/>	Move the documents to the archive
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP AI DEV WERBUNG			type="Advertisement"		<input type="checkbox"/>	All that remains
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP AI DEV WERBUNG			type="Newsletter"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP DEV MANUELL			type="Email"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP DEV MANUELL			type="Service"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP AI DEV WERBUNG			type="Other"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP DEV MANUELL			type="Invoice"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP DEV MANUELL			type="Credit Note"		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Move Documents	DWBC ADP AI DEV ERROR					<input type="checkbox"/>	

Mapping Lines PreProcess

✓ Saved

Mapping Details

+ New

Edit List

Delete

Enable	OpenAI Setup	System Prompt	User Prompt	Retry Attempts	TimeOut (seconds)	Reasoning Effort	Text Verbosity	Max Tokens	Retry Max Tokens	Comment
→ <input checked="" type="checkbox"/>	L GPT-4.1	You are an AI assistant specialized in a...	Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "..."	0	0	Low	Low	512	2500	
<input type="checkbox"/>	L GPT-5.1	You are an AI assistant specialized in a...	Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "..."	1	120	Low	Low	2500	2500	
<input type="checkbox"/>	L GPT-5.2	You are an AI assistant specialized in a...	Allowed values for the field "type": "Invoice", "Credit Note", "Service", "Service Record", "..."	1	120	Low	Low	1500	2500	