

Electronic Document Delivery for Business Portal

[BENEFITS]

Send the right documents to the right customers

Flexible capabilities let you choose which customers will receive electronic documents, as well as select the type of document you want to send — for example, Invoices, Credit Memos, Debit Memos, Finance Charges, and Returns.

Choose formats that work for you and your customers

Create documents in a wide range of formats — including Microsoft Excel, XML, PDF, and HTML — on a customer-by-customer basis, helping ensure seamless communication across applications and platforms.

Tailor documents to meet specific needs

Quickly create documents using a template, or design your own with the Crystal Report Designer. Easily add personalized notes in the e-mail body.

Improve scheduling and delivery efficiencies

Schedule document delivery for specific times of day or during off-peak hours. Activity logs and error reports help you monitor processes and ensure customers receive sales document e-mails according to schedule.

Organize and schedule the e-mail delivery of sales orders, invoices, credit memos, and other sales documents to your customers in XML, HTML, Microsoft® Office Excel® 2003, or PDF format, reducing administrative overhead and increasing customer responsiveness.

SCHEDULE AND DEFINE THE RULES for sending invoices, credit memos, sales orders and other sales documents to customers.

The screenshot shows the 'Electronic Document Delivery' setup page in the Business Portal. The 'Company Settings' section includes the following options:

- Send documents electronically: True
- Suspend sending documents: False
- Allow multiple attachments: False
- Allowed attachments: HTML, PDF, Excel
- Allow SOP orders: False
- Allow SOP invoices: True
- Allow Invoicing invoices: False
- Allow RM invoices: False
- Allow credit memos: False
- Allow debit memos: False
- Allow SOP returns: False
- Allow Invoicing returns: False
- Allow RM returns: False
- Allow finance charges: False

The 'Document Delivery Setup Status' dialog box displays the following progress:

Steps:	Status:
1. Set up at least one e-mail notification.	Complete
2. Set up at least one document delivery template.	Complete
3. Complete company setup.	Complete
4. Set up customers for document delivery using either the customer setup utilities or individual customer settings.	Complete

[FEATURES OVERVIEW]

Flexible Electronic Document Delivery	Organize and schedule the e-mail delivery of sales documents to the customers you specify.
Multiple Form Selection	Choose which documents you want to send, including Sales Orders, Invoices, Credit Memos, Debit Memos, Finance Charges, and Returns.
Custom or Standard Templates	Choose the document template, or design your own documents using Crystal Reports Report Designer. Crystal Reports templates for all document types are included.
Flexible Formatting	Choose the document format you want to use — including Microsoft Excel, XML, PDF, HTML, and more — on a customer-by-customer basis.
Familiar Print Options	Access the same print options available for Receivables Management, Sales Order Processing, and Invoicing in Microsoft Dynamics GP.
Automatic E-mail “Send To” Field Population	Using the e-mail statements feature in Microsoft Dynamics GP, you can populate the “send to” e-mail address when sending sales documents, helping reduce the administrative time required during the setup phase.
Add Personalized Notes to E-mail	Customize notifications messages and insert objects, such as customer name, customer contact, document amount, document sum amount, document count, or document number.
Customized Delivery Schedules	Schedule e-mail deliveries to occur at specific times of the day or during off-peak hours.
Customized Company Setup	Customize the system to only allow specific types of documents to be distributed, enable templates and notification IDs to be attached to the document types, or override this option at the customer level.
Customized Customer Setup	Customize settings for each customer, including: the type of document a customer can receive, the type of formatting to use, the document template and notification ID, e-mail size limitations, and more.
Document Tracking	Keep track of the number of documents sent electronically to a customer.
Activity Logs and Error Reporting	Review activity logs and error reports to monitor processes and ensure customers are receiving their sales document e-mails. Document errors are flagged and can be viewed and corrected, and activity logs enable you to quickly resend documents when necessary.