

# Zetadocs Delivery

## Powerful PDF emailing automation for Microsoft Dynamics NAV

### Consolidated batch delivery of NAV documents by email

All types of Microsoft Dynamics NAV<sup>®</sup> report, including customer invoices and statements, can be converted into PDF format and delivered directly from NAV in batches.

Zetadocs retrieves each recipient's information directly from Dynamics NAV and, based on their requirements and preferences, customers receive documents by email or printout. When several documents in a batch are for one recipient, they are grouped into a single email for convenience, rather than being sent individually.

Flexible delivery rules can overwrite the default NAV contacts on a per document basis, quotes can be sent to a different customer contact than invoices, and extra contacts can be added as additional recipients. The From email address for each document type can also be set so that replies can be received to a different shared mailbox.

### Consistent personalized content, every time

Zetadocs enables documents to be delivered with a professional appearance and consistent content, every time. Customized templates ensure every email and document is aligned with corporate branding, with appropriate logos.

Additional document attachments, such as terms and conditions or other supporting documents, can be automatically appended to reduce time spent managing document delivery runs.

### Store documents in SharePoint or network folders

Automated filing of delivered documents can be to a network folder, or indexed with metadata and stored in SharePoint. This ensures customer information is available online for search and retrieval across the organization, including by colleagues without access to Dynamics NAV.

### Further customization and scheduling of batches

Zetadocs Delivery Plus can be further customized to meet complex business rules and individual requirements. Invoices over a certain value can be copied to the sales director or Zetadocs can be programmed to switch the template and attachment that is automatically applied, based on what's been invoiced.

### At a glance

**Deliver documents in batches** that match customer delivery preferences

**Schedule batches automatically** to be sent as background tasks

**Consolidate multiple documents** for the same recipient within a batch

**Add attachments automatically** such as terms and conditions or other supporting documents

**Automatically file copies** in SharePoint<sup>®</sup> or network folders

**Send from all NAV clients** in the office or on the go

**Send documents and view archived copies** without leaving Dynamics NAV using the seamless Zetadocs integration

**Implement quickly and easily** as Zetadocs is installed on the NAV server and no client software is required

**Add additional email recipients** or set the From address using delivery rules

**Customize your email templates** for consistent corporate branding



### Technical Information

For details of supported platforms and other system requirements, please visit: [www.equisys.com/zdnaveinfo](http://www.equisys.com/zdnaveinfo)

In addition to automating the processing of Dynamics NAV documents in just a few clicks, Zetadocs Delivery Plus can also be customized to schedule the delivery of these personalized batches to run as a background task. Zetadocs can also be programmed to email customers automatically with the details of their overdue account when a reminder level changes in NAV, or even email as a batch a statement to each customer whose balance is overdue at the end of each month.

## Seamless integration with Microsoft Dynamics NAV that's simple to implement

Zetadocs is designed for Dynamics NAV. This means you don't need to leave NAV to send out batches of invoices using your NAV contacts, see the delivery progress of these emails using the Zetadocs Outbox, or view archived copies in the Zetadocs Documents FactBox.

Zetadocs is installed and configured on the Dynamics NAV server – no client software is required. Zetadocs supports all NAV clients, so no matter if you are using the NAV Windows client that's installed on your desktop, streamed to your PC via ClickOnce, the NAV Web client or even the Dynamics NAV app on devices, you can use Zetadocs to send batches of personalized documents electronically.

## Features

Delivering NAV documents with Zetadocs	Zetadocs Express	Delivery Essentials	Delivery Plus
Email any NAV report as a PDF directly from NAV, saving copies automatically to the electronic archive	●	●	●
Deliver documents in batches by email or hard copy to match customer preferences		●	●
Send from the NAV Web client or Dynamics NAV app on devices, in the office or on the go *		●	●
Use flexible delivery rules to add additional email recipients (To/Cc/Bcc) or set the From address		●	●
Consolidate multiple documents to the same recipient within a batch, so they receive one email *		●	●
Add attachments automatically such as terms & conditions or other supporting documents		●	●
Personalize email subject and message using templates to guarantee consistent delivery content		●	●
File copies into configurable folders (date/customer/type) in an electronic archive		●	●
Schedule delivery of invoices or other NAV reports to send in the background automatically **			●
Customize to meet your individual requirements using the Zetadocs Delivery SDK **			●

\* Dynamics NAV 2015 and later

\*\* requires the additional purchase of Zetadocs Delivery Plus and customization by Equisys Solutions Partners using the SDK

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