

Automated document delivery

Distribute reports by email from Microsoft Dynamics 365 Business Central

Zetadocs Delivery



Consolidated batch emails of Business Central documents

All types of financial reports, including customer invoices and statements, can be converted into PDF format and delivered in batches by email directly from Microsoft Dynamics 365 Business Central or Microsoft Dynamics NAV.

Zetadocs retrieves each recipient's information directly from Business Central or 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 contact details in Business Central or NAV on a per document basis. For example, 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 ensures documents are delivered with a professional appearance and consistent content, every time. Customized templates mean that every email and document is aligned with corporate branding, with appropriate logos.

Additional document attachments, such as terms and conditions can be automatically appended to save time spent managing document delivery runs. Other supporting documents like seasonal promos can be added when previewing, and the templated email body can be edited to further personalize the message before sending.

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 who do not have access to Business Central or 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 satisfy customers' delivery preferences

Schedule batches automatically to be sent as background tasks

Consolidate multiple documents for the same recipient within a batch

Attach supporting documents like seasonal promos just before sending

Automatically file copies in SharePoint® or network folders

Implement quickly and easily as Zetadocs can be installed as an Extension for Business Central from AppSource

Activity Log gives you a full record of all sent and archived documents

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

Customize your email templates for consistent corporate branding

Preview and edit before sending to further personalize the email message



Technical Information

For details of supported platforms and other system requirements, please visit: www.equisys.com/zdtechninfo

In addition to automating the distribution of Business Central or NAV documents in just a few clicks, Zetadocs Delivery Plus can be customized to schedule the delivery of these personalized batches to run as a background task. It can be programmed to email customers automatically as their accounts fall due, then send out month-end statements to customers with unpaid invoices and go on to chase overdue payments with wording to match the lateness of each one.

Seamless integration with Microsoft Dynamics that's simple to implement

Zetadocs is designed for Business Central and NAV. This means you don't need to leave Microsoft Dynamics to send out batches of invoices using contacts in the database, check the delivery progress of these emails using the Zetadocs Outbox, or view in the Zetadocs Documents FactBox what has been sent and archived. The Zetadocs Activity Log also gives you a full audit history and record of all documents sent with Zetadocs.

Features

Delivering Business Central and NAV documents with Zetadocs	Zetadocs Express	Delivery Essentials	Delivery Plus
Email any report as a PDF from Business Central or NAV, saving copies automatically to an electronic archive [†]	●	●	●
Deliver documents in batches by email or hard copy to satisfy customers' preferences		●	●
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 and add other supporting documents like seasonal promos when previewing		●	●
Personalize email subject and message using templates to guarantee consistent delivery content		●	●
Preview and edit before sending to further personalize the templated email message and payload		●	●
File copies into configurable folders by date/customer/type in an electronic archive		●	●
Schedule delivery of invoices or other Business Central or NAV reports to send in the background automatically [‡]			●
Customize to meet your individual requirements using the Zetadocs Delivery SDK [‡]			●

* Archiving to network folders is only available for Dynamics NAV when deployed on premises.

† Some Business Central reports require customization by an Equisys Solutions Partner using the SDK – see www.equisys.com/zdtechinfo for details.

‡ Requires Zetadocs Delivery Plus and customization by an Equisys Solutions Partner using the SDK.