

Business Intelligence and Reporting

BENEFITS

Send the right documents to the right customers. Flexible capabilities enable you to select which customers will receive electronic documents, and which type of document you want to send them electronically—for example, invoices, credit memos, debit memos, finance charges, and returns.

Choose file formats that work for you and your customers.

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

Tailor documents to meet specific needs. Quickly create documents using a template, or design your own with the Crystal Reports® Report Designer. Easily add personalized notes in the body of e-mail messages.

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

Electronic Document Delivery for Business Portal in Microsoft Dynamics GP

Organize and schedule the e-mail delivery of sales orders, invoices, credit memos, and other sales documents to your customers in a wide variety of file formats, including XML, HTML, Microsoft® Office Excel®, and PDF. The powerful and flexible capabilities of Electronic Document Delivery for Business Portal in Microsoft Dynamics™ GP help you reduce administrative overhead and increase your responsiveness to customers.

The screenshot shows the 'Electronic Document Delivery' configuration page in Microsoft Dynamics GP. The page is divided into several sections: 'Delivery Files' (view, update, and send pending documents), 'Delivery Log' (re-send documents or view history), 'Notifications' (define e-mail content), 'Templates' (create and modify options), 'Customer Settings' (view and update setup info), 'Customer Setup Utilities' (turn on/off delivery system), and 'Company Settings' (view and update setup info). A 'Company Settings' dialog box is open, showing a list of settings such as 'Send documents electronically' (True), 'Suspend sending documents' (False), 'Allowed attachments' (HTML, PDF, Excel), and 'Allow SOP orders' (False). A 'Document Delivery Setup Status' dialog box is also open, showing a list of steps and their completion 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 (Complete).

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

FEATURES

ELECTRONIC DOCUMENT DELIVERY FOR BUSINESS PORTAL

Flexible Electronic Document Delivery	Organize and schedule the e-mail delivery of sales documents to the customers that 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 a document template, or design your own documents using Crystal Reports Report Designer (purchased separately). Crystal Reports templates for all document types are included.
Flexible Formatting	Choose the document format you want to use—including Office Excel, XML, PDF, HTML, and more—on a customer-by-customer basis.
Familiar Print Options	Access the same print options that are available in the Receivables Management, Invoicing, and Sales Order Processing modules in Microsoft Dynamics GP, so the customer experience is similar whether documents are printed in Microsoft Business Portal or Microsoft Dynamics GP.
Automatic Population of the E-Mail Send To Field	If you are 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 Messages	Customize e-mail notifications by inserting personalized messages and/or 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 allow only specific types of documents to be distributed, and enable templates and notification IDs to be attached to the document types. You can 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	Track 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 that customers are receiving their sales document e-mail notifications. Document errors are flagged and can be viewed and corrected. Activity logs enable you to quickly resend documents when necessary.

For more information about Electronic Document Delivery for Business Portal in Microsoft Dynamics GP, visit www.microsoft.com/dynamics/gp.

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