



FACT SHEET



# Clever Document Delivery

Eliminate cumbersome paper-based  
& time-consuming processes

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## Are you spending unreasonable amounts of time just sending documents?

It's easy to create transactions in your Microsoft Dynamics 365 Business Central system, but you need your customers, vendors and anyone else you define, to get and action the resulting documents instantly and accurately.

Many companies today are still stuck in the paper world when it comes to sending out documents to customers and vendors.

Define email templates to pull through the correct contact and content information to personalize each communication.

Email individual documents or batches of documents all from within Dynamics 365 Business Central.

## Product Overview

Eliminate cumbersome paper based and time-consuming processes for sending out documents such as invoices, sales orders, purchase orders, statements, reminders, remittance advices and credit memos in Dynamics 365 Business Central with Clever Document Delivery.

### Benefits

- Quickly send documents to customers and vendors
- Maintain a log of all emails that have been sent and to easily resend a previously sent document
- Define who should be receiving documents making sure that the correct person is dealing with the correct documents
- Password protect the documents being sent so only those with the correct authority can view those documents
- Define email templates that pull through the correct contact and content information to personalize each communication

### Requirements

Dynamics 365 Business Central



## An all too familiar story

Do you spend a lot of time sending collection emails to customers? Is it time consuming to send statements and documents via email?

Your staff use up a lot of time manually sending out copies of documents: sales orders, invoices, purchase orders. This can be a time-consuming task and one which can impact productivity for your organization.



## Sit Back and Relax

Clever Document Delivery allows you to send documents via email with one click of a button. No need to print statements and invoices to PDF and assemble them into an email.

## Know it has made it to its destination

Clever Document Delivery is user friendly and easy to customize for your own requirements; including being able to set passwords on PDF documents to ensure security.

Being able to customize who receives the documents at the other end means that they can be actioned quicker because the right person in the right department is dealing with it.





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