

Customer Invoice and Related Documents Email App for Microsoft Dynamics 365 Finance and Operations

The Customer Invoice and Related Documents Email App enables an organization to effectively manage the customer queries and Microsoft Dynamics 365 Finance and Operation users to share multiple sales invoices to the customer with a single click of a button.

Overview:

In day-to-day business operations, an Account Executive deals with various customer queries and needs, including requests for copies of sales invoices. Manually sending invoices upon request can be a time-consuming activity.

With the Customer Invoice and Related Documents Email App, a Microsoft Dynamics 365 Finance and Operations user can select posted invoices and send them to a customer in a single click of a button. An automated email is sent to the customer's point of contact email id, as defined in the customer master record. All the customer invoices selected by the user will be printed in pdf format, zipped together and automatically emailed to the customer. Email configuration can be easily setup for this functionality to work.