

## **VisionPDF**

# Save time on printing and sending documents from Microsoft Dynamics NAV

**Vision**PDF makes it possible to send documents as an attached PDF file in an e-mail, with up to 3 other documents, in an easy and simple way.

On the Microsoft Dynamics NAV form, you simply get an e-mail button as shown below.

1001 The Cannon G	<b>- - X</b>		
General Invoicing Shipp	ning Foreign Trade E - Commerce	Order Date	Customer Information Sell-to Customer
Sell-to Customer No Sell-to Contact No Sell-to Customer Temp	10000 🕈	Document Date 24-01-08 Requested Delivery Date	Ship_to Addresses (2) Gontacts (5) Sales History
	The Cannon Group PLC	Campaign No	Bill-to Customer • <u>A</u> vall. Credit 0
Sell-to Address 2		Responsibility Center BIRMINGHAM 💽	

You can choose if you want to use the e-mail address taken from the customer or vendor card, or the contact. It is also possible to setup what should happen if no e-mail address is present:

VisionPDF Opsætning	
General Sales Templates Purchase Templates Service Template	s Advanced
Mail Attachment Type PDF	Use Contact E-mail  🔲
Mail-server Hostname	No E-mail Address Action Show E-mail
BCC e-mail address	Mail Technology Show E-mail
PDF Printer Name	Default E-mail Template . Correction List
PDF Master Password	
PDF Background	
PDF Background Page	

For each document type it can be setup what action you want:

💷 10000 Kontorcentralen	A/S - Customer Card		- • •
General Communication	Invoicing Payments Shipping	Foreign Trade	
Phone No		Mail Quote/Order Conf	
Fax No		Mail Inv./Cr.memo (print)	
E-Mail	kontorcentralen.as@cronuscorp.ne	et 🛅 Mail Reminder (print)	
Home Page		Mail Finance Charge (p	Mail PDF Print+PDF
IC Partner Code		Mail Statement (print)	
		Mail Service Doc (print) .	
		Mail Service Contract (	
		Mail Shipment/Receipt	

If Mail PDF is chosen a mail with an attachment will be created automatically.

Depending on the mail technology (MAPI or SMTP) the mail will be send immediately (SMTP) or shown and logged (MAPI)

### **Key Features**

- E-mail your quotes, invoices, orders and more - directly from Microsoft Dynamics NAV.
- With standard VisionPDF you get an e-mail button on the following forms:
  - Sales Quote
  - Sales Order
  - Sales Invoice
  - Sales Cr. Memo
  - Sales Blanket Order
  - Sales Return Order
  - Posted Sales Shipment
  - Posted Sales Invoice
  - Posted Return Receipt
  - Posted Sales Credit Memo
  - Purchase Quote
  - Purchase Order
  - Purchase Blanket Order
  - Purchase Return Order
  - Purchase Return Shipment
  - Service Contract Quote
  - Service Contract
  - Service Quote
  - Service Order
  - Service Invoice
  - Service Cr. Memo
  - Customer statement

Additional buttons can be created depending on your needs.

- Define templates for each type of document.
- In Pro version the customer statement embed the documents listed in the statement



### Just like standard printing, you are able to see how many times a document has been mailed

General Invoicing Shipping Foreign Trade BizTalk	
No	Posting Date 05-12-10
Sell-to Customer No 50000	Document Date 05-12-10
Sell-to Contact No E000005	Quote No
Sell-to Customer Name . Svend Hansen Møbler	Order No
Sell-to Address Marielundvej 84	Pre-Assigned No 1002
Sell-to Address 2	External Document No
Sell-to Post Code/City 2730 Herlev	Salesperson Code PS
Sell-to Contact Hr. Jesper Nielsen	Responsibility Center KØBENHAVN
Sell-to Contact Phone 🛛 🕅	No. Printed0
Sell-to Contact Fax No	(No. E-mailed
Sell-to Contact E-Mail 🛅	
Sell-to Contact Role	

#### **Define different templates**

You can define a mail template using substitutions for company name, address, document No. and many more, for each type of document. Each template can be used with a variety of languages. The background in the PDF document can differ from template to template and contain for example company logo or letter design.

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This message has not been sent.					Page			
To the carnon group of	The Cannon Gr	oup PLC				US, Birm	ingham R	C.
	Mr. Andy Teal 192 Market Square				Nicholls treet, 14			
Send Subject: Sales Quote 1001 fr	Birmingham, Ba Great Britain	27 4KT			B27 4	CT Birming	gham	
Attached: Duote 1001.pdf	Great Britain							
					Phone Fax N		+44-161 8	
Hi The Cannon Group PLC					VAT F	eg. No.	GB777777	777
Attached you find our Sales Quot					Giro N Bank		888-9999 World Wit	
					Accou		99-99-888	
If you have any questions regard	Bill-to Custome	r No. 10000			24 .1a	nuary 200	B	
Best regards								
Peter Saddow CRONUS International Ltd.	VAT Registratio Salesperson	n No. 789456278 Peter Saddow			Shipm Quote	ent Date	24	-01
5 The Ring Westminster	oucoperson	1 CICI Oddoon				Including		
London, W2 8HG 0666-666-6666				Unit of	Disc	Allow Invoice	VAT	
0000-000-0000	No.	Description	Quantity		Unit Price		Identifie	r
Quote V Line	70000	Side Panel	2	Piece	30,70	Yes	VAT25	
					Total GB	D Evel V	AT	
					25% VAT			
	VAT Amount S				Total GB	P Incl. VA	AT .	

### Customer Statements with embedded invoices

Customer Statements with embedded invoices can be mailed directly from the menu in Microsoft Dynamics NAV.

This way the customer can access invoice details directly from his Account Statement.

Entries						
						1.811.447,64
13-01-11	2594	Betaling 2011	13-01-11	-362.289,53	0,00	1.449.158,11
13-01-11	2594	Betaling 2011	13-01-11	-217.373,72	0,00	1.231.784,39
13-01-11	2594	Betaling 2011	13-01-11	-470.976,39	0,00	760.808,00
16-01-11	103008	Ordre 101004	<b>A</b> 晃 6-01-11	6.741,50	6.741,50	767.549,50
18-01-11	103009	Ordre 101012	8 🗟 0-01-11	1.849,06	1.849,06	769.398,56
18-01-11	104002	Kreditnota 104002	78-01-11	-6.741,50	0,00	762.657,06
21-01-11	104003	Kreditnota 104003	2 1-01-11	-9.806,70	0,00	752.850,36
24-01-11	103014	Ordre 101007	8 🗟 1-01-11	9.806,70	9.806,70	762.657,06
24-01-11	103002	Faktura 103002	7-02-11	59.389,22	59.389,22	822.046,28
			8		Total DKK	822.046,28