

Outbound for Microsoft NAV

What is it used for?

Invoice Automation for Microsoft Dynamics NAV has the ability to *bulk* distribute any transactional documents directly from a printed report.

Print your range to a master PDF containing all your documents in a single document.

Save it to a pre-configured area of the V1 Server. Within 30 seconds, the master PDF is split, the individual PDF's archived against each transaction and the contact's email address is used to send the document to the Supplier / Customer.

How do I use it from within Microsoft NAV?

- Login to Microsoft NAV
- In the search enter, Report Layout Selection
- Scroll down to the Sales Invoice report (206) ensuring it has a custom layout of V1 Document Management, click on it
- Click Run Report
- Enter a range for the Sales Invoices you wish to distribute (set number of copies to 0)
- When satisfied, click the down arrow on the Print... button and select PDF (CTRL+SHIFT+P)
- When the PDF has been generated, save it to the OUTBOUND share location setup during the implementation
- When the PDF disappears, it has been processed, the PDF's archived and distributed as per the contact selection on each document*

How do I see what has happened to a document?

- Browse to the V1 Smart Portal and login to V1 Smart Retrieve
- Search for your Sales Invoice(s)
- When viewing your image, click the Annotation icon to see details of the delivery:

Annotations for POSTED_SALES_INVOICES (13596)

Value	User	Date
This document was emailed to admin@wearev1.com - Customer Contact Fr. Birgitte Vestphael - on 14/11/2017	PETE	02/11/2018 ✕

OK

**NOTE in order to use the OutBound facility, the Contact for the transaction must have a valid email address. If not found, it will be copied to a NOTEMAILED directory to allow it to be retried once an email address is then set.*