SmartDeposit for Microsoft NAV

What is it used for?

The SmartDeposit web interface is used to archive pre-existing files supported by the standard solution.

These are then associated with the transactions, as attachments to those transactions or against Vendors or Customers. Once archived, these files are viewable either via the Microsoft NAV interface, or using the external viewer for users who do not have access to Microsoft NAV.

How do I use it from within Microsoft NAV?

- Login to Microsoft NAV
- Go to the Purchase Order Page (this is an example, any supported Page can be used)
- Open a Purchase Order
- In the V1 Document Management Action bar, click Deposit Document
- Login using your V1 DbLogin credentials (if you click ‘remember me’ you won’t need to keep logging on, your credentials will be remembered)
- Click the browse button and locate the image / email you wish to archive
- From the ‘Select Document Type’ dropdown, select Purchase Order
- You will be asked to confirm the company, pick it from the first dropdown
- Enter the Purchase Order number (or enter a * to search), click lookup/validate
- Click Deposit Document

How do I use it from outside Microsoft NAV?

- Open your web-browser of choice
- Navigate to the V1 Smart Portal by going to http://NAVSERVER:5002 (replace NAVSERVER with the actual web-address of your server)
- Login using your V1 DbLogin credentials (if you click ‘remember me’ you won’t need to keep logging on, your credentials will be remembered)
- Click on the SmartDeposit icon
- Click the browse button and locate the image / email you wish to archive
- From the ‘Select Document Type’ dropdown, select Purchase Order
- You will be asked to confirm the company, pick it from the first dropdown
- Enter the Purchase Order number (or enter a * to search), click lookup/validate
- Click Deposit Document

How do I attach an image or email to a transaction?

There are two types of attachment, a miscellaneous attachment which can be anything you like, or an email attachment which is the email itself as a file. As above with the added steps:

- When choosing your document type, Select either ‘Attachment – Misc’ or ‘Attachment – Email’ depending on what is it you want to archive.
- Again you will be asked to confirm the company, pick it from the first dropdown
- This time, choose your document type from the *field* as prompted
- Again enter the Purchase Order number (or enter a * to search), click lookup/validate
- Enter an optional Description for the attachment
- Click Deposit Document