

altusend

EMAIL & FAX MANAGEMENT FOR DYNAMICS NAV

An easy, integrated tool for sending a single or batch of Dynamics NAV reports and documents via email or fax

*Features

- Altus Send can send a single document or iteratively cycle through a batch of Sales Invoices or Purchase Orders
- Communication preferences for Customers and Vendors are set up on their cards and Contacts from Navision CRM can be selected by the user if Contact Management has been implemented
- Altus Send provides developers with a simple interface to build PDF automation into application process and is already integrated with the following Dynamics NAV areas:
 - Sales Orders
 - Sales Quotes
 - Sales Invoices
 - Purchase Orders
 - Purchase Quotes
 - Contact Management
- Users can set preferences for email signatures and fax cover page formatting
- Users can set default email body text for each report thus eliminating the need to re-key repetitive information in multiple messages

*Benefits

- Save time: the time it takes to create a PDF and attach to email, as well as the time it would take to create a batch of documents
- Improve consistency of communications: templates for email body and fax cover pages can ensure that information is being communicated consistently
- Improve collaboration: users can send information much more quickly and easily
- Improve formatting: Altus Send replaces unreliable html formatting with consistent design

It's Easy.

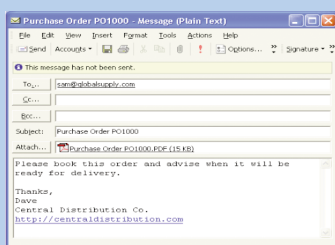
- Altus Send fills the gap for one of the most commonly requested functions, the ability to directly email or fax documents from within the software. This solution combines all of the following steps into one:
 - Prints reports to PDF files while determining a name for the file
 - Attaches them to email messages
 - Selects the sender
 - Composes a subject line and body text for the email
 - Perform these tasks repeatedly if sending to a list of recipients
- Altus Send can send a single document or iteratively cycle through sending a batch of documents to a list of recipients. Altus Send is already integrated with sales and purchase documents and contact management, but also provides developers with a simple interface to build PDF automation into application processes



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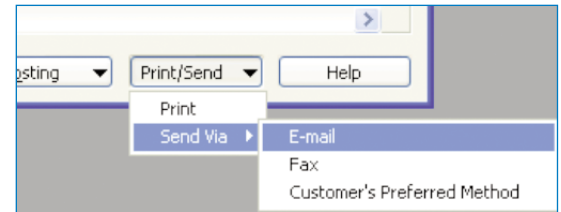
It's integrated.



Email message with PO attachment and default body text

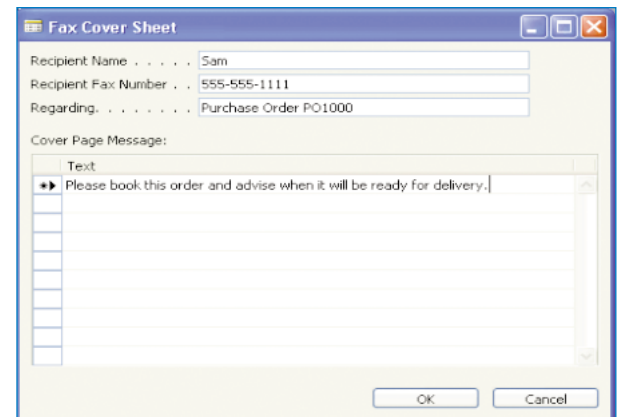
Technical Requirements

- Supports Dynamics NAV Version 3.7 and 4.0
- Altus Send integrates with other software to produce and send PDF documents. As a base requirement, each user requires PDF generation software to be installed. The two supported packages are:
 - PDF995 — Currently approx. \$10US per user
 - Win2PDF — Currently approx. \$40US per user
- For automatic emailing of documents, the add-on integrates with Microsoft Outlook using standard Navision processes
- For faxing, Mail/Fax will detect and support either Windows Fax or WinFax. One of these fax tools must be installed on the client computer (note that WinFax can be configured to route all faxes through a single line connected to a server)



Print/Send Menus added to Purchase and Sales Documents

^Purchase Quotes/Orders and Sales Quotes/Orders can easily be sent to the respective customers/vendors directly from the document forms.



Fax Cover Sheet Interface



Altus Email & Fax Management Menu

Altus Business Consultants

2A – 219 Dufferin Street
Toronto, Ontario M6K 1Y9
416-516-0050 ext 24
www.altusbusinesssolutions.com

