

# Easy PDF Email and Fax

## Windows or Web Client (shown below)

Addon for Microsoft Dynamics 365 Business Central



**Business Central Addins**  
a Vertical Leap Company

**Languages:** English

**Countries:** US, CA, UK, EI, ZA, NZ, AU

**Clients:** On Prem and Web Clients

**Price:** Contact Us for Pricing Information

## Easy PDF extends the BC ability to create PDF attachments to emails

- Batch send hundreds (or even thousands) of documents.
- Store a history of emails and attachments that have been sent.
- Add additional attachments automatically to batches.
- Consolidate multiple documents going to a single email address into a single email



## Send Documents Quickly and Easily

This addon allows NAV users to email, fax or print any document from within Microsoft Dynamics Business Central. Create e-mails with PDF attachments that look exactly like the printed report, or automatically send a fax to the customer's fax number.

E-mails are created from templates which can include Dynamics BC info such as the document numbers, order totals, customer information, or anything else. They may be created in any language, which will be linked to the Language Code on the Foreign Trade FastTab of the Customer Card.



Preview emails and attachments before sending for editing purposes or send automatically.

## Custom email/fax messages by user, by document

The email message body is always tailored to the document being sent.

Users may create email body messages that are specific to a BC user ID, by document. The email message body created by a person in sales sending a Posted Sales Invoice can be different from the email message body sent from a different person in accounting sending the same invoice.

EasyPDF Addresses

DOCUMENT CODE	ADDRESS TYPE	ADDRESS
POSTED SALES INVOICE	To	bob.coie@dynamicsnavaddons.com
POSTED SALES INVOICE	Cc	phl@dynamicsnavaddons.com
CUSTOMER STATEMENT	To	bob.coie@dynamicsnavaddons.com
POSTED SALES SHIPMENT	To	warehouse@dynamicsnavaddons.com
SALES ORDER	To	purchasing@dynamicsnavaddons.com

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## Batch or Auto Send Your Documents

Create a batch of documents for review and then send all of them. Filter the batch and partially send it. If multiple documents are being sent to the same email address, they may be "consolidated" and attached to a single email. If desired, multiple documents can be merged into a single PDF attachment. Attach additional documents, such as promotional flyers, Holiday messages or "Terms & Conditions" may be manually or automatically added to all documents in a batch or users may specify an additional attachment to only a specific line in the batch.

Customer Statements

Remittance Advices

Reminders

Finance Charge Memos

Posted Sales Credit Memos

Posted Service Invoices

Posted Service Shipments

Posted Sales Invoices

Posted Sales Shipments

Purchase Orders

DOCUME. CODE	DOCIME. NO.	RECIPIE. NO.	RECIPIENT NAME	VALUE	RECIPIENT ADDRESS	DELIVERY METHOD	DATE CREATED	CREATED BY	DEL. DATE DELIVER.	DELIVER. BY	MAIL TRANSP.
CUSTOMER...	01445544	01445544	Progressive Home Furnish...	2,461.00		Email	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	10000	10000	The Cannon Group PLC	256,484.02	bob.cole@dynamicsnavad...	Email	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	20000	20000	Selangoran Lts.	147,258.97		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	30000	30000	John Haddock Insurance C...	537,967.00		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	32059695	32059695	Antarcticoop	3,980.85		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	35451296	35451296	Clagn & Garmen	1,352.07		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	35963852	35963852	Heimilsgjafi	3,119.57		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	40000	40000	Deerfield Graphics Compa...	1,736.39		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	42147258	42147258	BYT-ADOMPLET s.r.l.	2,471.30		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	43687129	43687129	Designstudio Gmunden	21,162.46		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	46897889	46897889	Englund Kontorsmobler AB	1,038.28		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	47563218	47563218	Klubben	18,142.00		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	49525252	49525252	Beef House	23,357.24	bob.cole@dynamicsnavad...	Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	49623862	49623862	Autolhaus Mielberg KG	15,274.87		Print	6/4/2019	BC\BCOLE			Smtpr
CUSTOMER...	49826562	49826562	www.ther...	20,148.62		Print	6/4/2019	BC\BCOLE			Smtpr

## Store an audit trail

Store a history of all documents that have been emailed, faxed, or printed through Easy PDF. Store information about who sent the documents, to whom, when, what the subject of the email was, and what documents were attached. Even store a copy of the sent document, if desired, which can be restored and printed.

ENTRY NO.	DATE	TIME	DOCUME. CODE	DOCUME. NO.	SENT BY	SENDER	SENDER ADDRESS	RECIPIE. TYPE	RECIPIE. NO.	RECIPIENT NAME	TO
6	4/25/2019	12:43:14 AM	POSTED SA...	103015	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
7	4/25/2019	12:43:29 AM	POSTED SA...	103015	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
8	4/25/2019	2:41:50 PM	POSTED SA...	102013	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
9	4/25/2019	2:42:43 PM	POSTED SA...	103006	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	49525252	Beef House	
10	4/25/2019	2:43:35 PM	POSTED SA...	103006	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	49525252	Beef House	bob.cole@dyna
11	4/25/2019	2:47:46 PM	CUSTOMER...	10000	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
12	4/25/2019	7:46:34 PM	POSTED SA...	103001	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
13	4/25/2019	7:48:27 PM	POSTED SA...	103001	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
14	4/25/2019	7:13:19 PM	POSTED SA...	103001	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
15	4/25/2019	7:14:36 PM	SALES ORD...	101016	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
16	4/25/2019	9:06:45 PM	POSTED SA...	103001	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
17	5/2/2019	3:24:13 PM	POSTED SA...	103015	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
18	5/2/2019	3:24:25 PM	POSTED SA...	103015	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
19	5/2/2019	3:04:29 PM	POSTED SA...	103028	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
20	5/2/2019	3:04:32 PM	POSTED SA...	103028	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
21	5/2/2019	3:04:33 PM	POSTED SA...	103028	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna
22	5/2/2019	5:09:07 PM	POSTED SA...	103015	BC\BCOLE	Bob Cole	bob.cole@dynamicsnavad...	Customer	10000	The Cannon Group PLC	bob.cole@dyna

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