



DocumentPath

Advanced Document Distribution for Microsoft Dynamics NAV

What is DocumentPath?

DocumentPath is an add-on product for Microsoft Dynamics NAV to both streamline the sending process for documents (such as quotes, orders, invoices) and to improve the quality of the outgoing content/messages.

What versions of NAV are supported by DocumentPath?

DocumentPath is available for both NAV 2009 and NAV 2013. The product is exclusively designed for the Role-Tailored Client, and does not support the NAV 2009 Classic Client.

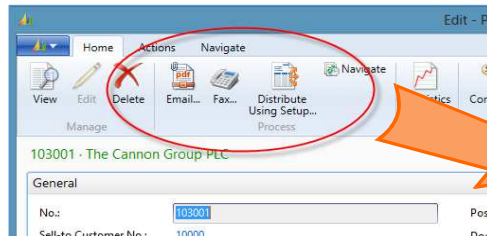
How do we buy DocumentPath?

DocumentPath is fully registered through Microsoft as an add-on for Dynamics NAV, available through Microsoft partners / resellers on behalf of their customers. Contact your partner to find out more. Partner inquiries can be directed to sales@epimatic.com.

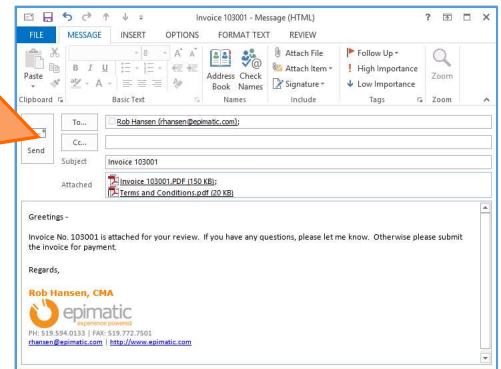
How much will this cost?

DocumentPath implementation is very straightforward, so minimal services time is required. Contact your NAV partner/reseller or sales@epimatic.com for software pricing information.

Easily send a full range of documents from Microsoft Dynamics NAV...



...using powerful features to generate messages with rich formatting, merge fields and additional attachments (such as Terms and Conditions sheets).



DocumentPath for Microsoft Dynamics NAV enables users to quickly and easily send documents via email or fax to Customers, Vendors and Employees (for payroll). Stop manually tracking whether each recipient wants to receive documents via email, fax or hardcopy, and let NAV do it for you. Define distribution rules for each document type, to direct documents to the right people automatically.

Streamlined Workflows

DocumentPath streamlines processes for generating and sending documents, increasing user efficiency. "Post and Distribute" actions enable users to run standard NAV processes and distribute the resulting documents (based on Customer/Vendor setups) in one step. Batch distribution functions enable users to send a range of documents through a single action. Post invoices throughout the day, and then send/distribute them in a single batch action at the end of the day.

Send Documents with Style

Define message templates using HTML format for rich, attractive content. Use dynamic merge fields in message templates to insert friendly greetings and field values from records being sent. Flowfields are supported, so a template for customer statements can include each customer's balance directly in the message body.

Send History

DocumentPath maintains a full history of sent messages/documents, accessible through Send History Factboxes on each page. Features are available to store copies of each sent PDF either in the database or a network folder, so the exact versions of documents sent with each message can be referenced later.

Send History			
View Message			
Date	Type	Sender Name	Sent To
8/7/2013	Email	Rob Hansen	rhanse
8/19/2013	Email	Rob Hansen	jfaw@
8/23/2013	Email	Rob Hansen	datkin

Additional Attachments/Record Links

Configure message templates to include additional attachments, either embedded into the primary PDF or as separate files. Include Terms and Conditions sheets with purchase orders, or include a user's vCard with every message that is sent. Use NAV Record Links to attach supporting documents to sales invoices, and then set the message template to include those with each invoice. Attach engineering drawings to purchase orders as Record Links, and have those automatically sent to the vendor along with the order.



Supported Documents/Processes

DocumentPath provides functionality to configure delivery settings and easily send the following documents:

Sales:

- Quotes
- Orders
- Return Orders
- Shipments
- Return Receipts
- Invoices
- Credit Memos
- Finance Charge Memos
- Reminders
- Customer Statements (Including copies of open invoices)

Purchasing:

- Quotes
- Orders
- Return Orders
- Receipts
- Return Shipments
- Invoices
- Credit Memos

Service:

- Quotes
- Orders
- Shipments
- Invoices
- Credit Memos

Other:

- Electronic Payment Remittance Advices
- Employee Pay Stubs (for Serenic Payroll)
- Any NAV report
- PDF Files outside of NAV (for marketing purposes or other communication to customers / vendors / employees)

SMTP Mail and Fax Support

Users can be set to use SMTP-based mail, providing a full email message interface within NAV for users not on Outlook or running NAV on a terminal/Citrix server. SMTP mail can also be used to send documents out from an overridden name/address, so that customer statements can go out from a central address such as **accounting@company.com**.

DocumentPath can fax documents through Windows Fax Services, or using email-based tools such as MyFax.com. Fax cover sheets are generated and pre-pended to the start of the PDF file, including a total page count.

Easy Integration

DocumentPath comes with an automated Integration Tool. Minimal development time is needed, providing a low cost of implementation.

Advanced Features

With the Extended Edition of DocumentPath, users can send customer statements through a single batch process, including copies of open invoices as trailing pages in the statement PDF file. *(No more calls asking for missing invoices to be resent!)* Make electronic payments a truly electronic process by emailing or faxing payment remittance advices. Payroll users can distribute employee pay stubs electronically. With DocumentPath, companies can significantly reduce paper usage and document processing costs.

For sensitive documents (such as pay stubs), take advantage of content checks to ensure that one employee NEVER receives another employee's payroll information. Generated PDFs can be password protected for added security, with tools to generate and communicate passwords out to recipients automatically.

DocumentPath Editions and Features

DocumentPath is available in three editions, with the features supported by each outlined in the chart below. Pricing starts with the Express edition and increases for the Standard and Extended editions.

	Express	Standard	Extended
Feature			
Distribute documents via hardcopy or Outlook-based Email	✓	✓	✓
Rich HTML message formatting	✓	✓	✓
SMTP email transmission		✓	✓
Fax support		✓	✓
Post and Distribute actions		✓	✓
Additional attachment support		✓	✓
Support for merge fields in message templates		✓	✓
Batch sending process for multiple documents		✓	✓
Send any Dynamics NAV report		✓	✓
Send existing PDF files (outside of NAV)			✓
Archive sent documents (store PDF files in database or in a network folder)			✓
Distribute customer statements			✓
Send electronic payment (EFT) remittance advices			✓
Distribute payroll stubs (Serenic Payroll)			✓
PDF password protection			✓
PDF content / verification checks			✓