



Business Central Addins
a Vertical Leap Company

Product Review

**For Microsoft Dynamics 365
Business Central**

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Agenda

- Easy PDF Email & Fax
- AR & Collections Manager
- Dimension Manager
- Shipping Connector
- Merge Utility

Coming Soon...AR & Easy and others



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Key

Bullet points in this presentation that are highlighted in yellow are functions that Business Central does not currently have out of the box.



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Easy PDF

- Convert Any Document in BC to a PDF Attachment to an Email.
- Store Address Book of email addresses by customer, by document.
- Create multiple message templates using HTML or Word.
- Batch Send Posted Sales Invoices (or AutoSend) or Cust. Statements.
- Batch Send Remittance Advices when using EFT.
- Save a searchable history of sent documents and resend if needed.
- Store Preferred Communication Method (Email, Fax, Print, or No Action).
- Send Any Report in NAV to a Distribution List.
- Combine documents being sent to a single email address.
- Send messages in multiple languages linked to language code.
- Facilitate Browser Printing



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AR & Collections Manager

- Three Major parts:
 1. Exception List
 2. Exception Manager
 3. Contact Event
- Allow “Write Off” of small remainder amounts by Reason Code.
 1. Generate Reports on Write Offs by Reason Code or by Customer
- Track invoices “In Dispute”.
- Enable Credit Management based on Credit Limits
- Calculate “Average Days to Pay” and “Average Days Late” by customer.
- Generate reports about Contact information and promised payments
- Display AR Dashboard.



AR & Easy (Coming Soon)

- Combines all functions of AR & Collections and Easy PDF into a app.
- Adds an alternate view – Exception Summary by Customer.
- Adds the ability to calculate customer relative importance by payment history and customer size.
- Adds the ability to batch send Reminders 2 ways



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Dimension Manager

- Add, Modify, or Delete any Dimension value for any posted Record.
- Store an audit trail of who changed what and when.
- Offer an “Undo” function that reverses a change made in error.
- Batch change lists of records.
- Change Dimension on individual posted document lines (under certain circumstances).
- Set desired Dimensions on Customers and push them to all posted AND open records.
- Option to restrict Dimension changes based on User Setup Posting Date Range.



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Shipping Connector

- Links BC to UPS WorldShip, FedEx Ship Manager, and USPS
- Direct Connect to UPS and FedEx APIs
- Will be adding links to Canada Post, Purolator, and DHL
- Passes any mapped data from Sales Order header to carrier software and returns charges and tracking numbers.
- Can be configured to calculate freight upcharges.
- Stores 3rd Part Account information
- Works with BC Warehouse Management and Transfer Orders.
- Package creation coming later this year.



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Merge Utility

- Merge all ledger entries from one Customer/Vendor/G/L (“Source”) account into another (Destination”) and delete the “Source” account.
- Store an audit trail of merges including who merged, when, source and destination accounts.
- Provide an “Undo” function to restore merged accounts.
- Provide a screen to perform multiple merges.
- When merging Customers, merge Ship-to Addresses and Contacts.
- Opt to create “Source” account as a Ship-to Address after merge.
- Display “Source” account for merge entries in Cust. Ledger Entry



Other Addons

Available in BC

- 1099 Toolkit
- Easy Currency Exchange
- Excel Journal Import



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