



# **Clever Essentials - explore the productivity apps you already have but are probably under-using**

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# Our aims

1

What's new in recent versions and what is coming soon.

2

Explore some useful but underused features

3

Tips and Tricks

# Clever Essentials



# Clever Credit

- What's New
  - Improved User Interface
  - More seamless integration with other apps and standard Business Central
  - Improvements to performance of calculating credit statistics and role centres.
  - Ability to background schedule calculating credit statistics.
- Demo
  - Using Power Automate to approve and release a credit help document in Microsoft Teams.

# Clever Comments

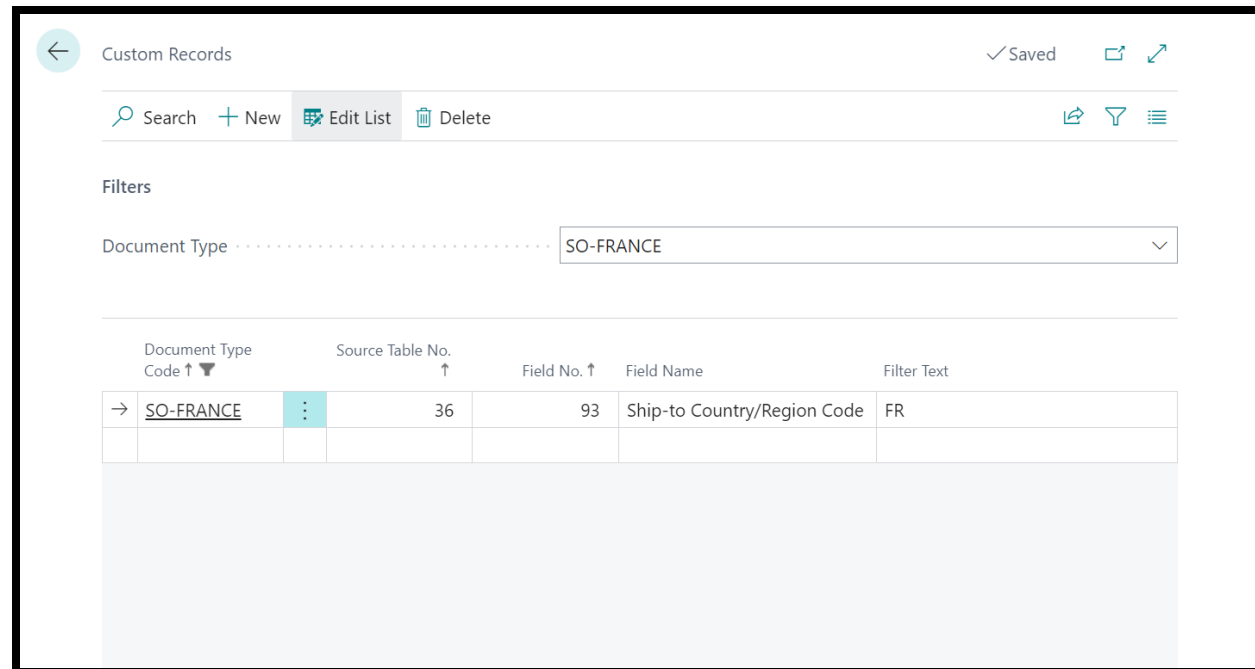
- Newest app in Clever Essentials:
  - Freeform Comment Entry
  - Ability to inherit comments
  - Ability to notify users of relevant comments
  - Integration with other apps (i.e. Clever WMS Devices)
- Demo
  - How to use comment types to efficiently inherit comments and notify users of relevant comments.

# Clever Document Delivery

- What's New
  - Automatically Generate and Send Statements
  - Auto Send Documents
    - Sales Order
    - Posted Sales Invoice
    - Purchase Order
    - Posted Sales Shipment
    - Remittance Advice
  - Set additional attachments in the Customer and K2K427endor Templates.
- Demo
  - Automatically Generate and Send Statements.

# Clever Document Delivery

- Coming Soon
  - Using styles to brand documents.



Custom Records

✓ Saved

Search + New Edit List Delete

Filters

Document Type ..... SO-FRANCE

Document Type Code	Source Table No.	Field No.	Field Name	Filter Text
→ SO-FRANCE	36	93	Ship-to Country/Region Code	FR

# Clever Document Links

- What's New
  - Improved Factbox
  - File Preview
  - Improved SharePoint Integration
    - Ability to structure files
    - Ability to add attributes (Metadata)
  - Ability to default attributes.
- Demo
  - Using attributes to help locate stored documents.



# Clever Data Validation

- What's New
  - Improved User Interface
  - More flexible validation rules.
  - Ability to block master data pending data validation
  - Data validation on releasing documents
  - Data validation on configuration packages data.
- Demo
  - Creating and using a new data validation template.

# Other Useful Resources

Clever Dynamics Documentation

<https://docs.cleverdynamics.com>

Training Videos (YouTube)

<https://www.youtube.com/@cleverDynamics3456>



**Thank you!**

Questions?



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