

Document Delivery v2.0

Why Use Document Delivery?

Document Delivery allows your Accounting, Parts, Service, and Lease Rental departments to send invoices and statements via email as opposed to printing and sending through traditional mail.

- Save time and cost by having your invoices and statements sent via email. The elimination of steps involved with paper documents reduces your time to receive payment while you save the cost of printing, postage, storing those documents.
- Streamline processes by eliminating steps such as printing, mailing, tracking, filing involved with paper invoicing/statements.
- Increase end-customer satisfaction with an easy set-up of your customer at the dealership. Additionally, delivery status of invoices and statements can be verified and lost emails can be re-sent within Excede, making customer support simple.

Pricing of Document Delivery v2.0

Procede provides you, our customers, with best-in-class solutions to drive efficiencies in your dealership. Document Delivery v2.0 includes many new and upgraded features that add value to your business.

Procede is implementing a monthly subscription for Document Delivery v2.0, which will allow us to continue to invest in development and support costs associated with maintaining and advancing the product.

Document Delivery v1.x will still be available to current Document Delivery customers at no cost, and you will not be required to upgrade at this time. However, the new version is packed with many features that will save costs, save time, streamline your processes and increase your customer satisfaction.

If you are interested in leveraging Document Delivery v2.0, please submit a work order via our [Customer & Resource Portal](#) (login required). Our Customer Success Team will review pricing details and provide a quote and/or contract terms.

Document Delivery v2.0

Document Delivery v1.x	Document Delivery v2.0
Separate web application to log into.	Runs embedded in Excede with no additional login required.
Customer expected to login and set-up preferences. Many customers do not set up, resulting in dealers having to go track down customer and set-up.	Dealership staff sets-up Document Delivery using the web application in an easy process.
Customer contact information kept separately from customer contact records used in other functions of Excede. Dealerships had to re-enter customer contact information to use the Document Delivery function.	Eliminate the need to set up the user twice by the built-in linking of Excede customer contacts with Document Delivery contacts.
No way to send emails using "to" or a "cc" options, but only via "bcc", resulting in undelivered documents as some email servers assume spam when emails were received to bcc recipients.	"To" and "cc" are now options to cut down on emails being caught in spam filters.
Only one email template set for the entire dealership group.	Allows set of email templates for each branch. Branches can show their own name, addresses, phone numbers, contacts, web URL, send "from" and more. (Note: Dealers are responsible for editing email templates. Procede Professional Services can also be used to create customer email templates.)
Email history data kept for 7 days, then deleted. This may cause support issues as by the time an issue escalates, the required information was no longer available.	Allows configurable length of time to keep email records in history. Default is 30 days, but this can be changed to as long as the dealer wants.
All invoice types sent in one email (one email for parts invoices, another one for service invoices, etc.)	Option per contact to combine any invoice type into a single email. Users can also define one attachment per email.
SMTP.com can be used as an alternative to Microsoft Office 365 and Google email for sending Document Delivery invoice and AR statement emails to overcome sending limits.	Now have the option to use SMTP.com or SendGrid. For dealers with Microsoft Exchange on-premises, a pickup directory can be specified to handle email delivery, thereby overcoming Exchange sending limits.
Not Available	Custom invoice delivery schedules can be created to accommodate different users' needs. Each customer contact can have their own invoice delivery schedule.
Not Available	New tab with the ability to view sent emails, resend emails, open attachments, and see if any errors occurred. Staff can verify that a missing email was sent and potentially resend it.