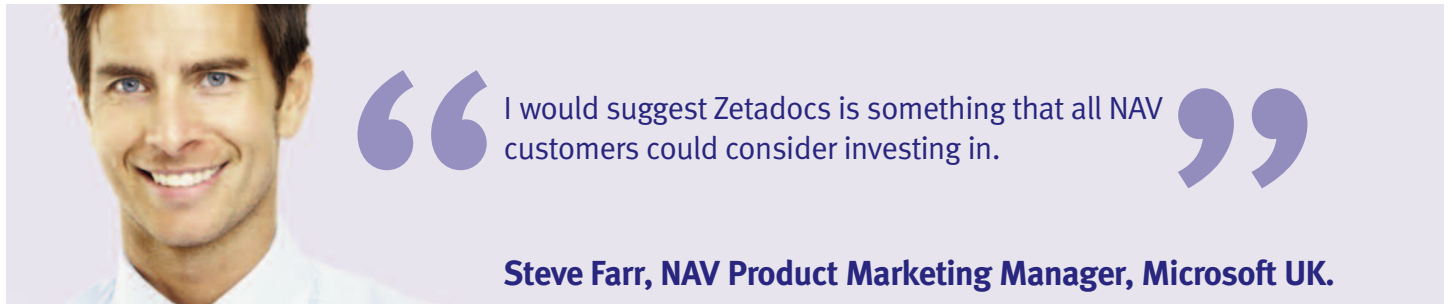


Zetadocs for NAV Capture Plus

Automate the electronic capture, filing and processing of documents, emails and faxes that relate to a Microsoft Dynamics NAV object.



Zetadocs for Microsoft Dynamics[®] NAV Capture Plus automates the capture, archive and processing of incoming documents, emails and faxes. Electronically filing all information centrally in NAV and SharePoint[®] provides instant access to all users, eliminates the need for cumbersome filing systems, reduces costs and increases efficiency.

Document processing

Manually processing documents that relate to a specific NAV transaction or record can be time consuming and prone to human error. To help automate the processing of documents, Zetadocs for NAV Capture Plus allows identifiers such as barcodes to be used to fully automate the filing of documents against a transaction in NAV. This ensures that all documentation is correctly and securely stored for future retrieval.

Approval processes

In many organizations, manual and paper-based authorization processes are incredibly time consuming and hampered by lost documents or mistakes. Zetadocs for NAV Capture Plus allows on-screen approval workflows to be built to speed up the process, and reduce the risk of errors. By using a Software Development Kit (SDK) which supports a customized NAV database, Capture Plus provides complete flexibility to ensure that existing processes can be incorporated into the solution.

Document retrieval

Paper-based systems also create delays and overheads in terms of document retrieval. Searching through paper archives is time-consuming and is a skilled task, and accessing old computer files can be difficult if new versions of programs cannot always read old file formats. Zetadocs for NAV Capture Plus provides full document text capture and indexing, including for scanned documents. This allows content based retrieval to ensure that information can be retrieved in seconds, not hours.

Zetadocs also automatically converts captured documents to PDF/A format, a common, secure format for processing, viewing and long-term storage. This future-proofs your documentation, ensuring that it can be accessed in years to come.

The advantages of Zetadocs for NAV Capture Plus

- **Customize information capture** to meet specific organization or industry requirements.
- **Fully automate document capture, archive and processing**, increasing efficiency and reducing costs.
- **Automate the filing of documents** against a transaction in NAV by using identifiers such as barcodes.
- **Speed up approval processes** by building on-screen authorization processes.
- **Secure storage and content based retrieval** with full document text capture and PDF/A storage.



Zetadocs for NAV Capture Plus - example uses:

- *Consignment and delivery documentation*

Drivers can drop off their consignment or delivery notes at the end of the day, allowing them to be loaded into a scanner and scanned overnight. By using bar codes to match these documents to a customer record, they are automatically available for the relevant staff to access when they come into the office. With integration, the scanning and matching of the documents could also automatically start off the invoicing process, leaving the finance team to process only the exceptions.

- *Rental agreements*

For rental services, documentation is usually created prior to the rental beginning, and on return of the item. If a rental agreement is sent out for signing, this can include a bar code which allows the returned agreement to be scanned and automatically archived, triggering release of the item. Similarly, any signed documentation on return of the item could also be scanned and archived, automatically triggering refund of any deposit.

- *Lease agreements*

Signed lease agreements can be automatically scanned and archived into the system, and can automatically trigger release of items for despatch, or schedule electronic delivery of invoices on a monthly basis.

- *Finance documents (e.g. loan agreements)*

For finance companies, received loan agreements or other finance documents can be automatically scanned and archived, triggering workflow for approval of the payment. OCR can also automatically extract information entered onto these forms.

- *Equipment lifecycle documentation (e.g. purchase, warranties, leasing, servicing)*

Over the course of its life, capital equipment accrues purchase or leasing documentation, maintenance contracts, servicing records and warranties. Scanning and automatically archiving this documentation ensures that everything is held in one central place for easy navigation and retrieval. Moving from paper to computer based systems will help ensure regular maintenance and servicing of equipment, and help track lifetime costs.

- *Employment contracts or timesheets for temporary workers*

Documentation for temporary workers can be automatically scanned or archived, prompting specific action to be completed. For example, a timesheet could be scanned into the system, and the relevant hours worked extracted automatically to calculate the correct payment. The document can then be indexed against the employee, allowing quick and easy approval for payment.

Technical Specifications

For details of supported platforms and other system requirements, please visit:

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