

# Zetadocs for NAV Delivery Essentials

Reduce costs and improve efficiency with electronic delivery, archive and retrieval of documents and reports from Microsoft Dynamics NAV.



“Zetadocs has revolutionized the way that we do business. Instead of spending hours and hours of time printing and then posting accounting documents, we can send them to the right customers right from our desktop with just a click of a button.”

**Jamaine Campbell, Customer Services Director, Qurius UK.**

The Delivery Essentials edition of Zetadocs for Microsoft Dynamics® NAV helps accounts departments improve efficiency, enhance customer service and reduce the costs associated with producing and handling paper documents. It automates the delivery of invoices, statements and other financial documents, and integrates with SharePoint® to provide secure document storage and fast retrieval.

## Delivery by email

Producing and packaging paper documents such as invoices, statements and remittances is a time consuming and costly process. By delivering documents via email, Zetadocs for NAV Delivery Essentials removes manual tasks as well as the cost of paper, consumables and postage, and can help organizations reduce their carbon footprint. Zetadocs delivers documents in batches, using a combination of rules to ensure that the customer gets the right document in the format they require.

## Document automation

Ensuring that the correct attachments and inclusions are sent with a document is vital to any organization to avoid unnecessary disputes or queries. Zetadocs for NAV Delivery Essentials produces documents with consistent content and a professional appearance. Using templates that define how a document will look when sent from NAV, stationery is automatically overlaid and specific attachments can be added to ensure the customer always receives the correct information.

## Fast document retrieval

In paper-based systems, documents are often misfiled or lost and information can only be accessed by a small number of people. This causes delays in handling queries or disputes, which in turn damages customer care. Zetadocs for NAV Delivery Essentials automatically indexes and archives copies of all documents sent from NAV into SharePoint. This makes valuable information available online for search and retrieval across the organization, so that more employees can respond to customer queries.

## The advantages of Zetadocs for NAV Delivery Essentials

- **Eliminate the costs associated with printing and posting** financial documents for immediate savings.
- **Encourage your customers to pay earlier** by sending statements of account instantly, on a more timely basis.
- **Empower colleagues who don't have NAV** by giving them direct access to the information they need to resolve payment queries and avoid disputes.
- **Archive every document sent accurately and securely**, cutting the administration time wasted on searching for paper copies.
- **Reduce your carbon footprint**, by removing your organization's dependence on paper.



Zetadocs creates a unique ID for each document stored in SharePoint so that all parts of a transaction can be linked, and users can easily find related documents by searching for a single item. When used in conjunction with Zetadocs for NAV Capture Essentials or Capture Plus, this provides full document management capabilities for Microsoft Dynamics NAV, and ensures that all information relating to a specific transaction is centrally held, and instantly retrievable.

## Technical Specifications

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

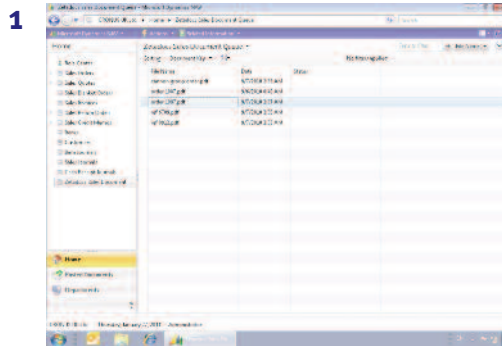
[www.equisys.com/zdnavtechninfo](http://www.equisys.com/zdnavtechninfo)

## Extended functionality

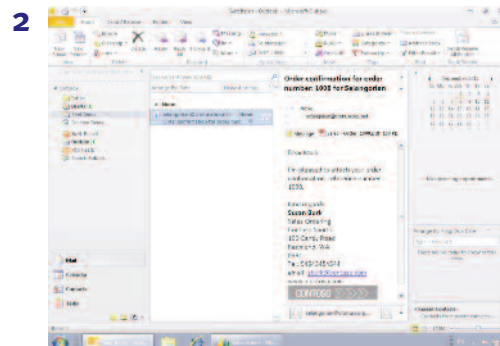
In addition to emailing, documents can also be delivered via fax by using our Zetafax Fax Connector, providing a full range of delivery methods and allowing delivery by email or fax at the click of a button.

Zetadocs Delivery Plus allows the production of documentation to be fully automated, for example to automatically produce and email customized reports such as monthly filings to regulatory bodies. For more information, see our Zetadocs for NAV Delivery Plus datasheet.

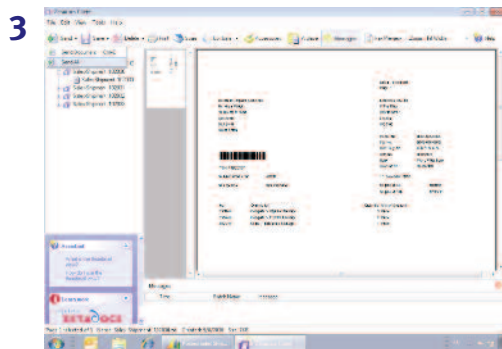
## Sales order processing with Zetadocs for NAV - Delivery Essentials



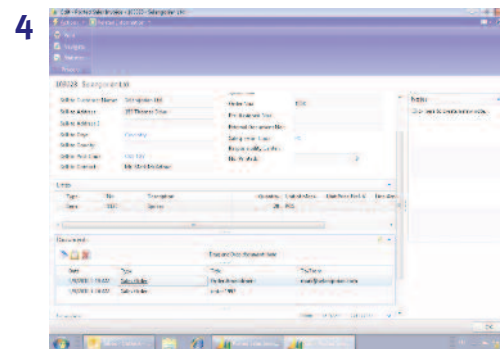
1 *Capture and view sales orders in NAV and create new orders.*



2 *Send a personalized order confirmation as a PDF by email.*



3 *Post the invoices and then deliver a batch of customer invoices from Zetadocs for NAV.*



4 *Sent documents are available for any authorized network user to view within SharePoint.*

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