

Zetadocs for NAV - Delivery Plus

Fully automate the production and delivery of documents and reports from Microsoft Dynamics NAV to reduce costs and improve efficiency.



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In short, Zetadocs appeared to address the issues for the credit control department head on. Zetadocs easily integrates with Microsoft Dynamics NAV, intelligently personalizing addressing details, content and attachments. The two products sit alongside each other seamlessly.

”

David Allwright, Systems Analyst, Man and Machine.

Zetadocs for Microsoft Dynamics® NAV Delivery Plus builds on the features and benefits of our Delivery Essentials product by fully automating the production and delivery of invoices, statements and other financial documents. Integrating with SharePoint® for secure document storage and fast retrieval, Zetadocs for NAV Delivery Plus provides even greater efficiency gains and cost reductions to a range of departments across your organization.

Document automation

For organizations that are using Microsoft Dynamics NAV, including supporting documentation with reports can be a time consuming process, with many documents needing to be photocopied or printed. Zetadocs for NAV Delivery Plus allows the entire process of collating, preparing and distributing documents to be fully automated, saving valuable hours and drastically reducing costs.

Regulatory compliance

Mandatory regular reporting to appropriate authorities to maintain compliance can also be an arduous task, and the penalties for omissions and errors can often be heavy. Customized document delivery via Zetadocs for NAV Delivery Plus can produce alerts and notifications automatically to ensure compliance at minimum cost.

Competitive pressures

In today's competitive landscape, organizations must do more and more to strive for customer satisfaction. Ensuring that the right documentation is sent with the correct attachments as securely and efficiently as possible is key to maintaining good customer relations. Customized special offers based on past purchasing history also helps to promote brand loyalty, and make you stand out from the crowd.

Zetadocs for NAV Delivery Plus allows you to truly excel in customer care, ensuring accurate, consistent information is delivered automatically by the customer's preferred method of receipt. Personalized promotions can also be emailed to your customer base, allowing you to maximize revenues from your existing customers.

The advantages of Zetadocs for NAV Delivery Plus

- **Save valuable hours and drastically reduce costs** by fully automating document production and delivery.
- **Ease compliance to regulatory requirements** by sending statements of account instantly, on a more timely basis.
- **Stay ahead of the competition** by delivering outstanding customer service and personalized offers based on past purchasing history.
- **Incorporate company or industry requirements**, with a flexible solution that can accommodate special workflows, data or values, etc.



Company or industry requirements

Paper-based systems can become particularly onerous when they need to take into account specific company or industry special requirements. Zetadocs for NAV Delivery Plus uses a Software Development Kit (SDK) which supports a customized NAV database, ensuring that documents are delivered and archived appropriately. This ensures that any special workflows, data types or values, or any other special requirements can be handled properly.

Technical Specifications

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

www.equisys.com/zdnavtechinfo

Zetadocs for NAV Delivery Plus - Example uses:

- *Automated sending*

Alerts and notifications can be produced automatically under the control of partner code, typically to trigger the next stage of a business process (e.g. produce and print a packing note for a sales order). This feature has also been used to produce and submit filing statements for a regulatory body, and is suitable for the automatic production, and emailing or posting on an intranet of management information reports. Alerts of events in NAV can also be produced, such as informing a customer of their order progress or informing a sales manager of new orders.

- *Custom data values*

Many NAV databases have customized data models with non-standard record and field types. Zetadocs for NAV Delivery Plus has been used successfully to ensure the correct processing of such customizations when delivering and archiving documents. For example, a custom value (e.g. a sales region code, contract number or any other data value) may be needed in the text of the covering email for a report, or used as an indexed column in SharePoint, allowing any document produced or received to be retrievable based on that custom value.

- *Alternative addressing options*

Zetadocs offers configurable rules to determine who should receive a copy of any report and how (email, fax or on paper). This logic can be extended in any way via Delivery Plus, such as different handling of invoices above a certain value, or copying documents to additional recipients in specific circumstances.

- *Message content/attachments based on business logic*

The content and attachments of any document produced by Zetadocs can also be controlled programmatically by using Delivery Plus. CAD drawings relating to a specific order may be attached automatically, or time sheets supporting a sales invoice can be included with it. The exact text of letters produced automatically chasing overdue payments may depend on the time overdue, the value and also the customer's payment history. Special sales promotions may be offered, based on past buying habits.

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