

# Zetadocs Express for Microsoft Dynamics NAV

Downloadable document management add-on that integrates Microsoft Dynamics NAV with Microsoft Office 365



“ Zetadocs is saving us a lot of time, will save us money, and has made communications for our users a lot easier. Overall, we’re also providing a better service to our customers. ”

**Muniza Brazier, OSL Group Ltd.**

Zetadocs Express for Microsoft Dynamics NAV gives additional value to users of Microsoft Dynamics NAV by providing improved document management using Microsoft SharePoint Online, a component of Microsoft Office 365.

Part of the Zetadocs for NAV suite, Zetadocs Express helps customers reduce costs and enhance business processes by allowing electronic delivery of documents, and offering quick and easy storage online in Office 365 directly from NAV, via a drag and drop feature.

## Document archiving

When documents that relate to a specific transaction or customer record are stored in different locations and different formats, the cost of filing, indexing and storing these documents within an organization can be a significant overhead. Physical paper documents are also prone to being mislaid or misfiled, and may even be completely lost due to a disaster such as a fire or flood. Zetadocs Express allows incoming emails, faxes and scanned documents to be quickly and easily stored online in Microsoft Office 365 via a drag and drop interface, with links to the record in NAV automatically created. This ensures that all documents are securely stored online, for easy retrieval on-screen through NAV or SharePoint.

An upgrade to Zetadocs Capture Essentials supports batch document processing and the Zetadocs Capture Plus edition handles automatic document filing, providing opportunities to further reduce the time taken to archive and store documents. Captured documents can be archived automatically through use of an identifier such as a barcode or the optical character recognition of a document number.

## Document delivery

Delivering paper documents such as invoices can be a significant drain on resources for any organization. Zetadocs Express helps remove manual tasks associated with document delivery by providing simple emailing of reports such as invoices, using the email address in the customer card. This also helps reduce the cost of document delivery in terms of stationery, consumables and postage, and can help organizations reduce their carbon footprint.

An upgrade to Zetadocs Delivery Essentials allows batch delivery of documents by email and/or fax, along with the automatic attachment of associated documents and overlay of specific stationery. This drastically reduces the time taken to complete business processes such as sales order processing, invoicing and collections management. Customization and complete automation of such business processes is possible with the Zetadocs Delivery Plus edition.

## Benefits of Zetadocs Express for Microsoft Dynamics NAV:

- **Quickly and easily capture incoming documents, emails and faxes**, allowing instant access from within NAV and SharePoint.
- **Reduce the costs** of filing, indexing, storing and retrieving information.
- **Improve the efficiency** of sales, purchasing, and other document approval processes.
- **Reduce costs** by electronically delivering documents via email.
- **Reduce your carbon footprint** by recycling more paper, and removing the need to print emails and attached documents.



## Fast document retrieval

Document retrieval can be a lengthy process if paper documents are stored in different locations, or isolated in individual systems such as email accounts. This paper chasing can cause significant delays in key business processes and, more importantly, can also delay responding to queries.

With Zetadocs Express, electronically delivered documents are electronically stored online in SharePoint alongside captured documents. Links to the customer record are automatically created to allow quick and easy retrieval of information via NAV or SharePoint. This allows more people to access key business information on-screen, ensuring that any query is handled as efficiently as possible.

Zetadocs Delivery editions allow a wider range of reports from NAV to be electronically delivered and archived in SharePoint. Zetadocs Capture editions allow captured documents to be processed in batches, providing superior efficiency gains and customer service improvements.

## Document workflow

Paper based document approval can also be a long and arduous task, especially when documents are lost or buried under other paperwork on an approver's desk. Documents stored electronically in SharePoint can be routed electronically using a simple document approval workflow in SharePoint, speeding up the process of approval and ensuring documents are not lost or misfiled.

Zetadocs Express displays the approval status in the Document FactBox in NAV, allowing users to monitor progress or make adjustments where necessary. The originator is notified by email when the workflow finishes, so that further operations, such as payment, can be completed manually.

Zetadocs Capture Plus and Zetadocs Delivery Plus editions offer greater opportunities for business process automation and customization.

## Technical Specifications

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

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

## Zetadocs for Microsoft Dynamics NAV functionality comparison

Zetadocs Capture Features	Benefits	Zetadocs Express	Capture Essentials	Capture Plus
<b>Drag &amp; Drop</b> feature allows emails and files to be stored in SharePoint with links to NAV	On screen access to documents improves customer service and reduces the need for paper files	●	●	●
<b>Document approval</b> workflows to sign-off documents on screen using SharePoint	Saves time, provides greater convenience and helps prevent documents getting mislaid	●	●†	●†
<b>Batch processing</b> of emails, files and scanned documents using multi-user document queues	Efficiency improvements, saving time and improving customer service		●†	●
<b>PDF/A conversion</b> of documents to ISO standard archive format with additional custom metadata	Assured long term access to an eco-friendly electronic archive with an optimal fit to the business			●
<b>Automated filing</b> of documents, splitting batches using barcode recognition and OCR ‡	Maximizes time savings and customer service benefits while reducing dependence on paper			●

  

Zetadocs Delivery Features	Benefits	Zetadocs Express	Delivery Essentials	Delivery Plus
<b>Save &amp; Send</b> by email NAV sales and purchasing documents, filing copies in SharePoint	Reduces use of conventional mail, resulting in cost savings and a smaller carbon footprint	●	●	●
<b>Batch sending</b> by email and fax* according to customers' and vendors' preferences	Efficiency improvements, saving time and improving customer service		●	●
<b>Overlay &amp; Attach logos</b> , letterheads, terms & conditions and personalized covering emails to NAV documents	Enforces compliance with corporate brand guidelines and regulatory requirements		●	●
<b>Programmable control</b> of attachments such as timesheets and brochures, based on context	Further efficiency improvements, saving time by automating document production processes			●
<b>Fully customizable</b> sending based on business logic requirements, with tagging using custom metadata	Maximizes time savings and customer service benefits with an optimal fit to the business			●

†Feature planned for future release of Zetadocs for NAV

‡Zetadocs Document Imaging Automated Filer and Zetadocs OCR barcode processor options are required for automated filing and batch splitting by Zetadocs Capture Plus

\*Fax delivery is an optional extra for the Delivery Essentials and Delivery Plus editions

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