

# Case study: Equisys

Zetadocs for NAV promotes faster, more efficient accounts processes

Equisys is a leading software developer, specializing in the class leading Microsoft Dynamics™ software range. They have over 60,000 customers, in more than 100 countries which are served through an international partner network of distributors, resellers and ISVs.



## The Problem

The accounting department at Equisys used to print and post hundreds of statements, remittance advices and invoices on expensive pre-printed stationery each month. The average cost of printing and posting each document was estimated at 70p, on top of the cost of the time taken by administrative staff for the handling of each piece of mail. In addition, some customers had made a request to receive their documents by either email or fax.

Equisys were also interested in improving the efficiency of their filing practices and providing non-finance people, particularly sales, easy access to documents. They had recently started to store documents off site, and although this reduced the cost of storage on a per square foot basis, it was proving to be a less than ideal solution.

## The Requirement

Equisys use Microsoft Dynamics NAV to manage their accounting processes. Equisys had recognized that they needed to find a more efficient way to send out financial documents to their customers. The solution needed to be easy to use, generate the anticipated cost savings and allow for personalized, branded documents to be sent by the customer's preferred method – mail, fax or email, to the correct contacts at an organization.

Equisys also had a requirement to handle in-bound customer documents such as sales orders more efficiently. These were being received by email, fax or post, and a hard copy was stored along-side the corresponding invoice in filing cabinets. Equisys didn't want a complicated document management system, but wanted a solution that would mimic their existing paper process by linking documents together, and allow either or both documents to be retrieved quickly.

## The Solution

Equisys chose to integrate Zetadocs for NAV. The unique advantage of Zetadocs was that it provided comprehensive electronic document production and management from NAV. Equisys were

What they say about Zetadocs for NAV  
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Colin Duxberry, Finance Director

equisys  
**ZETA**DOCS®  
Capture. Deliver. Share.



able to incorporate the capture of inbound documents, with automatic document creation and delivery, and enable secure storage via Microsoft SharePoint® Server with instant access for authorized users.

"There are a number of products on the market, but only Zetadocs for NAV could meet all our requirements within one solution," says Colin Duxberry, Finance Director. He adds "We were already using SharePoint internally as our company intranet and Zetadocs integrates with this to provide the document management capabilities we were looking for, whilst providing comprehensive document creation and delivery options. Also, as we have developed this product in-house, we are slightly biased!"

## The Benefits

Now, with Zetadocs for NAV, Equisys can send statements, invoices and remittances without any printing at all, unless a customer has explicitly asked for a paper copy. The reduction in printing and posting has resulted in significant savings. In addition, Zetadocs for NAV has streamlined their accounts processes, and has reduced the time wasted on repetitive, manual tasks.

Colin Duxberry at Equisys says, "Zetadocs for NAV improves our customer service and it saves us time and money. We used to spend hours each month sending out invoices and statements to all our accounts. Now it takes us a couple of minutes. An additional benefit of delivering electronically is that customers will often acknowledge receipt and commit to a payment date. When we posted invoices we often had no idea if they had been received.

"Zetadocs for NAV has made an immediate impact on our business", explains Colin Duxberry, "It is a complete end to end solution. Now, when we receive orders from customers, we can process them on screen and then save a copy of the original document so it can be accessed from within NAV or from SharePoint. This can be accessed by sales people on the road or by employees in other offices, meaning the accounts department handles less queries. We've virtually eliminated paper from our accounts processes which has dramatically cut our costs and improved overall productivity."

## About Equisys

Equisys produces software packages for document production and delivery, including the award winning Zetafax® network fax server and newly acclaimed Zetadocs® PDF software that creates and emails personalized PDF documents.

Our software products are designed for small and mid-market businesses, and for departmental use at multinational companies. They stand out from the competition by being simple to install and manage, reliable and great value - backed by outstanding service and support.

We have over 60,000 customers, in more than 100 countries, who are served through an international partner network of distributors, VARs, resellers and ISVs.

Our market leading fax server, Zetafax, speeds the flow of critical business documents by enabling users to send and receive faxes on their PCs. It integrates with ERP, CRM, accounting and other applications for automated faxing from those systems, providing auditable records of fax communications.

Zetadocs helps users work smarter by creating and emailing PDF documents, streamlining business processes to remove tedious manual procedures and help companies improve the service levels they offer.

Equisys was founded in 1987 and has offices in London, UK and Atlanta GA, USA.

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