

Document management and delivery software

Zetadocs: Document management and delivery software

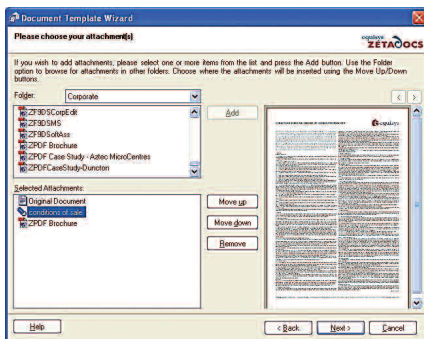


“Zetadocs has revolutionized the way we do business. Instead of spending hours and hours of time printing and then posting accounting documents, we can send them to customers right from our desktop with just a click of a button.”

Cedilla Systems

The costs of handling documents:

- Ineffective filing and retrieval - it costs £15 just to file a piece of paper and £500 a year rental space for a single filing cabinet (Gartner)
- Cost of postage and packaging - 5% of company revenue is spent on document production (IDC)
- Poor access to information - up to 30 percent of the working day is spent just looking for data (Microsoft)



Create document templates to automatically add stationery and attachments to your documents before converting to PDF

Zetadocs is a family of software products that integrates with CRM, ERP, and other business software packages to automate the production and delivery of business documents. Users can capture and create documents such as statements, invoices and quotations instantly on their PC and then deliver them automatically by email, fax, or as paper copies.

Zetadocs can automate entire business processes with a single mouse click, improving customer service and reducing the cost of handling paper documents.

Create professional documents in seconds

- Combine documents from multiple file types such as Microsoft Office files, PDFs and scanned paper documents, into a single PDF for emailing or faxing
- Overlay stationery and add attachments to your newly created document
- Routinely add personalized subject and body text to emails
- Automatically archive copies of all sent documents
- Support for electronic Bates numbering

Reduce paperwork and repetitive tasks

- Flexible delivery options are available to meet specific customer requirements, including email, fax and print
- Create, send and automatically archive batches of documents, such as statements, with a single mouse click
- Preview batches of documents and manually edit before delivery
- Set delivery confirmation rules from a fax server or from your email client
- Automatically add company stationery and attachments such as conditions of sale or terms and conditions, to adhere to corporate standards

Automate production and delivery

- Save time by applying document delivery properties - for example, add company stationery or terms of business to all sales quotations
- Set rules to automatically add email addresses, subject text and covering messages
- Store templates on the network so they can be shared by all Zetadocs users

“I was looking for a solution that improved efficiency, and I definitely got that with Zetadocs. The reduction in the time it takes has been staggering. The sales team were spending almost half an hour assembling the documents, and then it would be another day before they were received. Zetadocs means that the customer receives their contract in seconds.”

Dunton plc



Simple storage and retrieval

- Eliminate trips to the filing cabinet by allowing Zetadocs to manage the capture and storage of paper and electronic documents
- Support compliance by ensuring that all inbound and outbound documents are stored automatically and can be retrieved instantly
- Enable several users to view the same document simultaneously

Cost effective and personalized document delivery

- Reduce the time and cost associated with printing, packaging, posting, and then filing documents by 80%
- Deliver professional looking documents that always have the correct attachments
- Personalize documents and emails to ensure maximum impact
- Deliver documents the way your customers want to receive them whether it's email, fax, or print
- Free-up accounts teams to focus on business critical tasks

Enhanced productivity

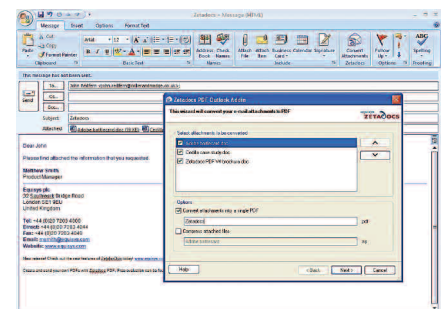
- Speed up delivery by emailing business documents on corporate stationery as PDFs instead of using regular mail
- Eliminate the cost of storing paper originals by automatically storing each sent document
- Save time and money by sending batches of documents directly from Microsoft Office, CRM or ERP systems

Better, faster customer service

- Deliver documents such as sales quotes immediately by email or fax, according to customer preference
- Standardize on the format of all your external communications using centrally managed document templates
- Automatically record customer contact in a central network location, so users have access to complete and accurate customer records

The advantages of using Zetadocs:

- Documents are filed automatically and retrieved on screen - savings of £10,000 based on replacing 20 filing cabinets (Gartner)
- Personalized PDF delivery by email and fax - savings of £20,000 per year based on sending 2,000 documents a month (at £1 per invoice)
- Less time spent searching for relevant documents as these can be accessed company wide - productivity gain of up to 30 percent



Convert email attachments to PDF directly from Microsoft Outlook

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“There are lots of software packages that can create PDFs, but none with the sophistication of Zetadocs for merging multiple documents together, adding a personal touch and distributing them automatically by email.”

Aztech MicroCentres



How Zetadocs works



Technical Specifications

Windows Vista™ Business, Enterprise or Ultimate Edition (32 bit & 64 bit), Windows® XP Professional (32 bit).

Windows Terminal Services or Citrix Presentation Server™ 4 and 4.5 with Windows Server® 2008 (32 bit & 64 bit) or Windows Server 2003 (32 bit & 64 bit).

Integrates with Microsoft Office Outlook® versions 2003 & 2007, Lotus Notes® 6, 6.5, 7 & 8 and SMTP email systems.

Supports PDF attachments created in PDF 1.2, 1.3, 1.4 and 1.5 standards.

Integrates with Microsoft Dynamics™ NAV (requires Zetadocs for NAV).

Hardware requirements

Windows Vista Business, Enterprise or Ultimate Edition (32 bit & 64 bit): 1GHz Pentium-compatible CPU or faster, 1GB RAM.

Windows XP Professional: 300MHz Pentium-compatible CPU or faster, 512MB RAM.

Further information

To find out more about Zetadocs products for specific applications refer to our product datasheets or visit www.equisys.com.

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