

Zetadocs for NAV - Delivery Essentials

Integrate Zetadocs Delivery Essentials with Microsoft Dynamics NAV to enable electronic delivery, archive and retrieval of financial documents.



“I would suggest the Zetadocs for NAV is something that all NAV customers could consider investing in.”

Steve Farr, Product Marketing Manager, Microsoft UK

Zetadocs for Microsoft Dynamics® NAV - Delivery Essentials 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

Packaging and posting statements, invoices and remittance notifications is a time consuming and costly process. Zetadocs Delivery Essentials sends these accounting documents automatically by email. It delivers in batches using a combination of rules to ensure that the customer gets the right document in the form that want to receive it. Users can define delivery based on company name, contact name, document type and preferred method of receipt.

Document automation

Zetadocs Delivery Essentials produces documents with consistent content and a professional appearance. It uses templates that define how a document will appear when sent from NAV. Using the rules defined above, stationery is automatically overlaid and specific attachments can be added to ensure the customer always receives the correct information. For example, different payment conditions can be added to documents sent to customers on different payment terms.

Fast document retrieval

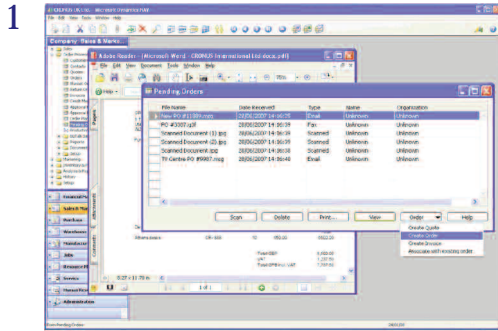
Zetadocs Delivery Essentials automatically indexes and archives copies of all documents sent from NAV into SharePoint. These documents are then made available online for search and retrieval, allowing your business to share valuable NAV information across the organization to help employees respond to customer queries.

Zetadocs creates a unique ID for each document stored in SharePoint so that all parts of a transaction can be linked. NAV and non-NAV users can easily find related documents by searching for a single item.

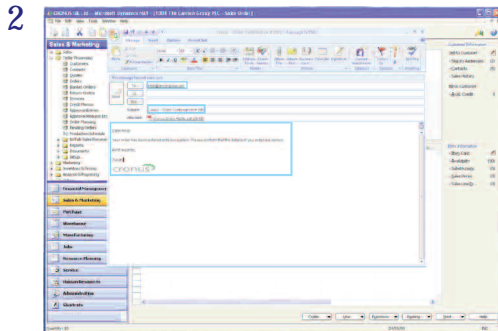
The advantages of Zetadocs for Microsoft Dynamics NAV

- Eliminate the costs associated with printing and posting financial documents and see 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.

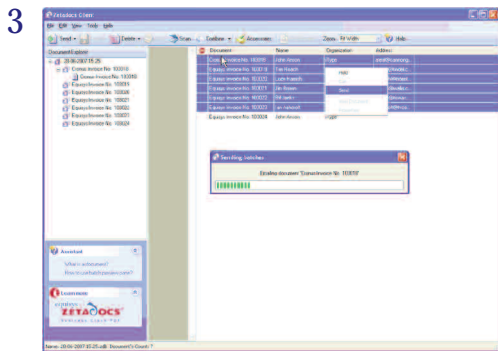
Sales order processing with Zetadocs for NAV - Delivery Essentials



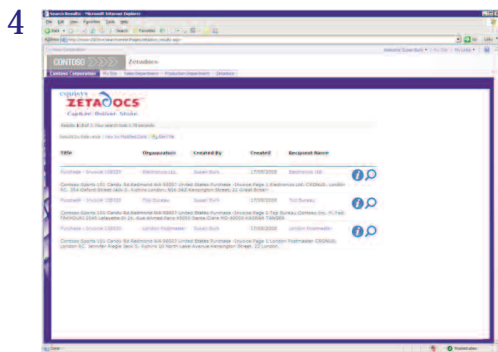
Capture and view sales orders in NAV and create new orders



Send a personalized order confirmation as a PDF by email



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



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

Technical Specifications

Windows Vista™ Business, Enterprise or Ultimate Edition (x86 or running 32 bit on x64),
Windows® XP SP2 (x86 or running 32 bit on x64),
Windows Server® 2003 SP1 or later (x86 or running 32 bit on x64),
Windows Server 2008.

Requires Microsoft.NET Framework version 2.0.

Integrates with Microsoft Office

Outlook® 2003 SP2 and 2007.

Integrates with Lotus® Notes® V6.5 and above.

Integrates with SMTP email systems. Active Directory® integration for rapid and easy deployment to all network users.

Creates PDF files which are readable using Adobe® Reader® software version 5 and later.

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

Specifies PDF security options such as allow printing, content extraction and password protection.

Password protection using 40-bit and 128-bit encryption.

Integrates with NAV version 4.0, version 5.0 and version 6.0 (x86 or running 32 bit on x64).

Supports Microsoft Office SharePoint® Server (MOSS) 2007 and Windows SharePoint Services (WSS) v3.0 (x86 or running 32 bit on x64)

Client Hardware requirements

It is recommended that systems have Pentium® class CPUs of 1 GHz or higher with 512 MB RAM or more.

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