

Zetadocs for GP Capture Essentials

Improved customer service through electronic filing of inbound information for fast, efficient retrieval in Microsoft Dynamics GP or SharePoint.



“

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.

The Delivery Essentials editions of Zetadocs for Microsoft Dynamics[®] GP allows inbound documents, faxes and emails to be easily linked to a record in GP, or used to create a new record. Filing this information electronically ensures secure storage in a central repository for instant access from within GP or SharePoint[®], allowing customer queries to be handled quickly and efficiently by more staff. Electronic filing also removes the need for expensive paper storage systems, and allows more paper to be recycled which helps meet sustainability targets.

Document archiving

The cost of filing, indexing, retaining and retrieving documents within an organization can be a significant overhead, especially if documents that relate to a transaction or customer are stored in different locations and different formats. Zetadocs for GP Capture Essentials allows incoming documents to be linked and archived against a transaction, ensuring that all information can be quickly and easily retrieved from within GP or SharePoint.

Document processing

The management of paper documents and emails that flow through sales and purchasing processes can be extremely time consuming, with information held in different systems and different locations. With Zetadocs for GP Capture Essentials, all documents, emails and faxes can be captured and electronically filed alongside their related GP transactions. This ensures that all information relating to the transaction is instantly available, providing a complete picture which speeds up the sales and purchasing process.

A paper-based document authorization process can also take a significant time to progress, and is prone to lost documents, errors and delays. Zetadocs allows documentation relating to an approval process to be viewed on-screen, reducing the risk of lost documents and saving time for users involved in the process.

The advantages of Zetadocs for GP Capture Essentials

- **Easily capture incoming documents, emails and faxes**, allowing instant access from within GP and SharePoint.
- **Reduce the costs** of filing, indexing, storing and retrieving information.
- **Improve the efficiency** of sales, purchasing, and other document approval processes.
- **Ease compliance to corporate and regulatory guidelines** by efficiently filing all documents electronically.
- **Reduce your carbon footprint** by recycling more paper, and removing the need to print emails etc.

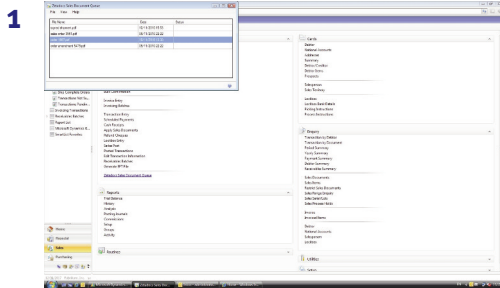
Corporate and regulatory compliance

Compliance to corporate and regulatory guidelines requires documentation to be quickly and easily available for review. By storing documents electronically against the GP transaction or record, information is quickly and easily available which eases the compliance process. When used in conjunction with Zetadocs for GP Delivery Essentials, all information relating to a specific transaction is held in the same place and instantly available.

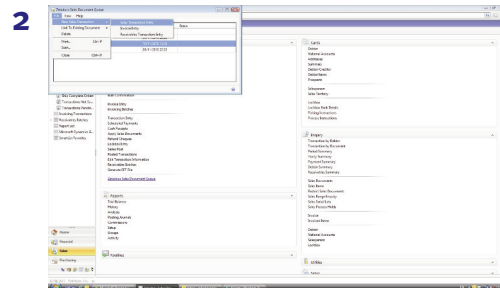
Technical Specifications

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

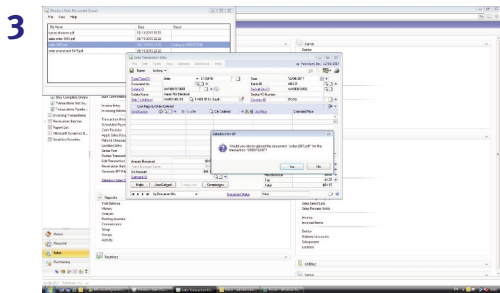
www.equisys.com/zdgpinfo



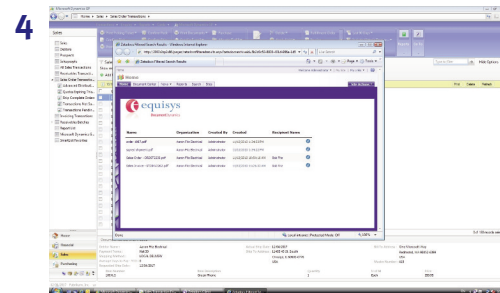
Documents such as emails, faxes or scanned documents can be quickly and easily captured into the Zetadocs sales queue.



Transactions can be easily created from the original document.



Original document is archived in SharePoint with links to the record in GP.



Document can be retrieved in GP or SharePoint.

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