

Equisys automates the capture and filing of documents for Microsoft Dynamics NAV

Barcode recognition and OCR allows faster approval processes, simpler audit, stronger compliance and improved customer service

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At Convergence today Equisys announced enhancements to its Software Developers Kit (SDK) for Zetadocs for NAV. Using the new SDK, Microsoft Partners can extend their customers' Microsoft Dynamics NAV systems to automate the capture and filing of key business documents such as signed consignment notes, automatically triggering on screen approval processes. The resulting time and efficiency savings compared to traditional paper based processes result in compelling returns on investment.

Chris Oswald, CEO of Equisys, stated "It's now even easier for mid-sized companies using Microsoft ERP software to benefit from the same efficiency savings as larger corporations by moving paper-based processes on screen. Many of the benefits derived from equipping a mobile workforce with expensive handheld computers can be achieved with judicious continued use of paper forms in the field, combined with Zetadocs for NAV and its new document capture SDK."

Zetadocs captures received emails, faxes and paper documents to Microsoft SharePoint and can link them into Microsoft Dynamics NAV automatically using bar codes or Optical Character Recognition (OCR). This means that both NAV and non-NAV users can view the supporting paperwork for transactions in NAV, resulting in faster approval processes, simpler audit, stronger compliance and improved customer service. The product also integrates with Microsoft Dynamics NAV to email and fax NAV reports such as invoices, statements and payment advice notifications. These documents are delivered with automatically generated covering messages, overlaid logos and file attachments to save time and costs, while ensuring consistency. To aid compliance and customer service, a copy of every document sent is archived to SharePoint, linked back appropriately into NAV.

Zetadocs' powerful SDK enables a Microsoft Dynamics Partner to customize the functionality of both document capture and document delivery using NAV's C/SIDE development environment. Equisys provides both training and technical support to assist partners undertake such work.

Wherever there is a paper, emailed or faxed form requiring completion and/or signature, then Zetadocs' automated capture can assist with the capture and processing of this documentation. Using the SDK it is now possible to automatically extract information from a captured form, and then automatically link it from SharePoint into the relevant NAV transactions. Business processes will run faster and more efficiently, and cost savings will be delivered from the replacement of paper based filing of such documents.

As standard, Zetadocs supports a flexible set of rules to determine which NAV reports should be emailed, faxed or printed – and how the final document should appear: the personalized text of the covering email, any overlay to be applied and which attachments are to be added. This logic can be extended in many ways using the SDK. For example, customizations to the NAV system such as custom data fields can be used in the delivery logic and SharePoint archiving. C/AL code can be added to determine on the fly details such as which file attachments should be added to a report, perhaps technical drawings or safety notices relating to a particular billing invoice.

The Zetadocs for NAV SDK is available from Equisys now, and supports the latest versions of Microsoft Dynamics NAV.

About Equisys

Equisys produces software packages for document production and delivery, including the award winning Zetafax® network fax server and a family of Zetadocs® products that include Zetadocs for NAV/GP and Zetadocs PDF.

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 which 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 delivering electronic documents, streamlining business processes to remove tedious manual procedures and help companies improve the service levels they offer. Zetadocs integrates seamlessly with Microsoft Dynamics

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

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