

# Zetadocs for NAV Delivery Essentials

Email batches of PDF documents from within Microsoft Dynamics<sup>®</sup> NAV



“ I find Zetadocs a great way to demonstrate clear financial benefits to the board – more so than with any other software we have purchased. ”

**Richard Howarth, Finance Manager,  
Holchem Laboratories Ltd**



The Delivery Essentials edition of Zetadocs for Microsoft Dynamics NAV enables documents to be sent in PDF format from within NAV, easing the task of finance teams.

- Deliver batches of documents, quickly and easily
- Add corporate stationery and attachments for a professional appearance
- Automatically save documents in a central store for improved, company-wide access
- Built for Microsoft Dynamics NAV: tightly integrated and fully compatible

## Batch delivery of NAV documents by email

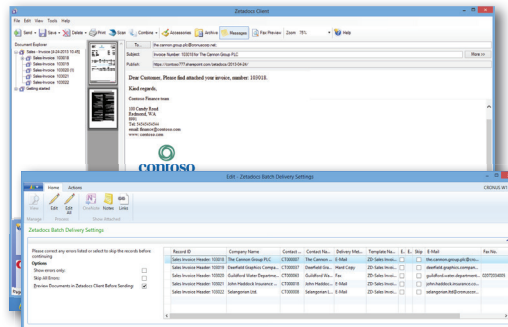
Using Delivery Essentials, all types of NAV report, including customer invoices and statements, can be converted into PDF format and delivered in batches.

With a single click, customers receive documents via their preferred method, whether email or printed statement.

The optional use of digital signatures confirms that items are sent securely, supporting EU guidelines.

## Personalized look and feel

Delivery Essentials provides simple end user tools that enable documents to be delivered with a professional appearance and consistent content, every time.



The Cannon Group PLC  
192 Market Square  
Birmingham B27 6ET  
Great Britain

Bill to Customer No. 10000  
192 Market Square  
Birmingham B27 6ET  
Great Britain

Invoice No. 100001

Routing Date 20/01/14  
Due Date 20/02/14  
Document Date 20 January 2014  
Payment Terms 1 Month/2% 8 days  
Shipment Method Ex Warehouse  
Prices Including VAT No



**Sales - Invoice** Page 1

CROCUS International Ltd  
3 The Ring  
Westminster  
W2 2JG London

Phone No. 0666-666-6666  
E-Mail  
Home Page  
VAT Reg. No. GB77777777  
Cus. No. 000-0000  
Bank World Wide Bank  
Account No. 99 99 9999  
Salesperson Peter Saddon

| No.             | Description          | Printed Statement Date | Quantity | Unit of Measure | Unit Price | Discount % | VAT Identifier | Amount          |
|-----------------|----------------------|------------------------|----------|-----------------|------------|------------|----------------|-----------------|
| TRK001          | Assembling Furniture | 20/01/14               | 25       | Hour            | \$4.00     |            | VAT10          | 1,000.00        |
| TRK002          | Assembling Furniture | 20/01/14               | 120      | Miles           | \$4.00     |            | VAT10          | 4,800.00        |
| <b>Subtotal</b> |                      |                        |          |                 |            |            |                | <b>7,800.00</b> |

Customizable templates allow users to create overlay stationery aligned with corporate branding, including company logos and letterheads.

Additional document attachments, such as terms and conditions, can be automatically appended to reduce the time spent managing document delivery runs.

### Zetadocs for NAV Delivery Essentials

- **Send batches of NAV documents** with a single click
- **Digitally sign PDF documents** for added security and assistance with EU guidelines
- **Overlay corporate branding** through customizable end user templates and attachments
- **Storage via SharePoint or network folders** enables document access for both NAV and non-NAV users
- **Built for NAV** - Zetadocs for NAV is Certified for Microsoft Dynamics NAV 2013
- **Advanced document management** available via upgrade to our Electronic Invoicing solution

### Technical Specifications

For details of supported platforms and other system requirements, visit:  
[www.equisys.com/zdnavtechinfo](http://www.equisys.com/zdnavtechinfo)

## Store documents via SharePoint or network folders

Ensure customer information is available online for search and retrieval across the organization. Zetadocs for NAV Delivery Essentials provides two choices for automated storage of delivered documents. Items can be saved to a network folder, or indexed and stored in SharePoint, where they can be accessed both from outside of NAV and from within NAV itself.

When documents are stored in SharePoint, related metadata is automatically added to each item, making it easier for colleagues to search for and find copies of sent documents.

## Advanced document management with our Electronic Invoicing solution

By upgrading to our *Electronic Invoicing* solution, Zetadocs for NAV Delivery Essentials becomes a powerful document management tool that centralizes all related inbound and outbound documents. Finance teams can store incoming documents against their relevant NAV records with a simple 'drag and drop' action. Once stored, documents can then be accessed on screen by both NAV and non-NAV users, shortening query times and improving customer service.

For more information, see our Zetadocs for NAV Electronic Invoicing [datasheet](#), or watch our Electronic Invoicing video on [YouTube](#).

| Delivering NAV documents with Zetadocs                                                                                                    | Zetadocs Express | Delivery Essentials | Electronic Invoicing |
|-------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------------|----------------------|
| <b>Save and Send</b><br><i>Email documents in PDF format directly from NAV, saving a copy in SharePoint</i>                               | ●                | ●                   | ●                    |
| <b>Batch delivery</b><br><i>Deliver documents in batches, by email or hard copy</i>                                                       |                  | ●                   | ●                    |
| <b>Network folder storage</b><br><i>Optional storage of all delivered documents to a network folder</i>                                   |                  | ●                   | ●                    |
| <b>Customizable templates</b><br><i>Use company logos and letterheads for a professional look and feel</i>                                |                  | ●                   | ●                    |
| <b>Additional document attachments</b><br><i>Automatically include additional documents, such as terms and conditions</i>                 |                  | ●                   | ●                    |
| <b>NAV Classic client</b><br><i>Send documents using NAV's Classic Windows client</i>                                                     |                  | ●                   | ●                    |
| <b>Secure PDF files with digital signatures</b><br><i>Digitally sign sent PDFs for added security &amp; assistance with EU guidelines</i> |                  | ●                   | ●                    |
| <b>Optional fax delivery</b><br><i>Choose to send documents by fax, in addition to email and hard copy options</i>                        |                  |                     | ●                    |

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