

# Zetadocs for NAV - Sales Order Processing

Reduce costs with email delivery and speed up query resolution by capturing your customers' purchase orders. Improve file retrieval and customer service by securely storing order confirmations and invoices in the same electronic archive.

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I would suggest that Zetadocs is something that all NAV customers could consider investing in.

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**Steve Farr, NAV Product Marketing Manager, Microsoft UK.**

Efficient processing and management of sales orders is vital to your customer relations and business growth. Sales orders can arrive via fax, post or email, and processing them can be a costly, manual and time-consuming process. If you process your orders quickly, efficiently, and correctly every time, you will not only generate revenue more quickly, you will also promote better customer satisfaction, which leads to repeat business.

Our solutions can enable you to send, receive, store, retrieve, and share documents throughout the sales order process with just a few clicks of a mouse and without the expense of printing documents. We can help you keep your customer accounts up to date, allowing you to stay on top of payments and credit control.

Zetadocs for Microsoft Dynamics NAV is an electronic document management solution that reduces the time and costs associated with receiving, processing, archiving and retrieving incoming documents, emails and faxes. It offers a powerful solution for improving accounts payable processes.

## Capture and file accurately

Customers' purchase orders arrive in the finance team via a number of methods. The management of the paper documents and emails that flow through your sales processes can be extremely time consuming. The cost of filing, indexing, retaining and retrieving documents within an organization can be a significant overhead, especially if all of the documents that relate to a specific transaction or customer are stored in different locations and different formats.

With Zetadocs for NAV, all documents, emails and faxes can be captured and electronically filed alongside their related NAV transaction. This ensures that all information relating to the transaction is instantly available on screen, providing a complete picture which speeds up the entire process.

## The benefits of Zetadocs:

- **Quickly and easily capture** incoming order documents, emails and faxes, allowing instant access from within NAV and the electronic archive.
- **Reduce your costs** by sending order confirmations and invoices via email to cut printing and postage costs, and the related filing, indexing, storing and retrieval costs of capturing documents.
- **Improve the efficiency** of the sales order processes. Track order amendments and rectify orders ahead of shipping to save time and help keep order-to-cash process costs low.
- **Ensure that all information is instantly available** by capturing incoming emails, faxes or scanned documents for central storage with accurate linking.
- **Achieve real customer service improvements** by enabling all users to visibility to track information relevant to each stage of a sales process without the need to involve the finance team, whilst keeping customers informed.



## Reduce document delivery costs

There is no doubt that delivering paper sales documents is time-consuming and costly. Aside from the direct costs of paper, consumables and postage, the time it takes to print, collate, package and post documents adds significant costs to the process. What's more, paper invoices can take days to reach the customer which adds further delays.

Zetadocs for NAV delivers your order confirmations and invoices electronically, directly from NAV. Zetadocs also personalizes delivery of these documents in batches as PDF, based on the recipients' requirements and preferences. This includes overlaying stationery, adding attachments like conditions of sale and populating the address details and email content. A single click sends all of the invoices, updates NAV and archives a copy of each invoice electronically alongside the customers purchase order for secure, efficient retrieval.

## Easily access all information

With more and more orders and updates being received via email, important information can be isolated in an individual's email account or even printed off to be held in paper files. This means that information can be lost, hidden away or inaccessible when it is needed.

Zetadocs for NAV allows emails, electronic faxes or scanned orders to be centrally processed using multi-user document queues, improving order visibility and accurate filing or for lower volumes simply drag and drop documents received against the NAV record, automatically archiving the information and creating links to enable swift retrieval from within NAV or the electronic archive directly. This then ensures that the information is consistently available instantly to anyone who needs it, from a secure and central location.

## Improve customer service

Ensuring that the right people have access to the right documents at the right time is essential to resolving any disputes quickly. Storing paper documents across multiple locations, with few staff having access to them makes answering customer queries harder, and this can lead to dissatisfied customers. It's better to have everything available on screen instantly.

For many organizations, customer queries are often only able to be handled by the finance team who can access the ERP software. This can cause delays in responding to customer questions, which can impact customer satisfaction. By storing all sent documents and captured information centrally, Zetadocs allows more users to quickly and easily find the information they need.

For example, when customer service agents needs to find a copy of an invoice, they can search with information such as the invoice number, customers' purchase order number or customer name. Aside from retrieving the invoice, they will also be presented with any related information linked to the invoice to help them quickly resolve any query, and avoid delays or disputes.

For more information on the capabilities of Zetadocs for NAV, please visit [www.equisys.com/zetadocs\\_for\\_nav](http://www.equisys.com/zetadocs_for_nav)

Or watch our Sales Order Processing video to see it in action [www.equisys.com/products/zetadocs/videosalesorderproc.html](http://www.equisys.com/products/zetadocs/videosalesorderproc.html)

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## Technical Specifications

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

[www.equisys.com/zdnavtechinfo](http://www.equisys.com/zdnavtechinfo)

