

Zetadocs Express for Microsoft Dynamics NAV

Downloadable document management add-on that integrates Microsoft Dynamics NAV with Microsoft Office 365



“ 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.

Zetadocs Express for Microsoft Dynamics[®] NAV gives additional value through improved document management by integrating Microsoft Dynamics NAV with Microsoft SharePoint Online, a component of Microsoft Office 365.

Part of the Zetadocs suite, Zetadocs Express helps customers reduce costs and enhance business processes by allowing electronic delivery of documents, and offering quick and easy storage online in Office 365 directly from NAV, via a drag and drop feature.

Document archiving

When documents that relate to a specific transaction or customer record are stored in different locations and different formats, the cost of filing, indexing and storing these documents within an organization can be a significant overhead. Physical paper documents are also prone to being mislaid or misfiled, and may even be completely lost due to a disaster such as a fire or flood. Zetadocs Express allows incoming emails, faxes and scanned documents to be quickly and easily stored online in Microsoft Office 365 via a drag and drop interface, with links to the record in NAV automatically created. This ensures that all documents are securely stored online, for easy retrieval on-screen through NAV or SharePoint.

Upgrades to Zetadocs Capture editions support batch document processing and automatic document filing, providing opportunities to further reduce the time taken to archive and store documents. An automated filer allows captured documents to be archived automatically through use of an identifier such as a barcode or the optical character recognition of a document number.

Document delivery

Delivering paper documents such as invoices can be a significant drain on resources for any organization. Zetadocs Express helps remove manual tasks associated with document delivery by providing simple automated emailing for reports such as invoices, using the email address in the customer card. This also helps reduce the cost of document delivery in terms of stationery, consumables and postage, and can help organizations reduce their carbon footprint.

An upgrade to Zetadocs Delivery Essentials allows batch delivery of documents by email and/or fax, along with the automatic attachment of associated documents and overlay of specific stationery. This drastically reduces the time taken to complete business processes such as sales order processing, invoicing and collections management. Customization and complete automation of such business processes is possible with the Zetadocs Delivery Plus edition.

Benefits of Zetadocs Express for Microsoft Dynamics NAV:

- **Quickly and easily capture incoming documents, emails and faxes**, allowing instant access from within NAV and SharePoint.
- **Reduce the costs** of filing, indexing, storing and retrieving information.
- **Improve the efficiency** of sales, purchasing, and other document approval processes.
- **Reduce costs** by electronically delivering documents via email.
- **Reduce your carbon footprint** by recycling more paper, and removing the need to print emails and attached documents.



Fast document retrieval

Document retrieval can be a lengthy process if paper documents are stored in different locations, or isolated in individual systems such as email accounts. This paper chasing can cause significant delays in key business processes and, more importantly, can also delay responding to queries.

With Zetadocs Express, electronically delivered documents are electronically stored online in SharePoint alongside captured documents. Links to the customer record are automatically created to allow quick and easy retrieval of information via NAV or SharePoint. This allows more people to access key business information on-screen, ensuring that any query is handled as efficiently as possible.

Zetadocs Delivery Essentials allows a wider range of reports from NAV to be electronically delivered and archived in SharePoint, ensuring a greater collection of information is available for access. Zetadocs Capture editions allow captured documents to be processed in batches, providing superior efficiency gains and customer service improvements.

Document workflow

Paper based document approval can also be a long and arduous task, especially when documents are lost or buried under other paperwork on an approver's desk. Documents stored electronically in SharePoint can be routed electronically using a simple document approval workflow in SharePoint, speeding up the process of approval and ensuring documents are not lost or misfiled.

Zetadocs Express also allows the approval status to be seen within the Document FactBox in NAV, allowing authorized users to monitor the progress of the approval, or make adjustments where necessary. The originator is notified of the workflow completion via email, allowing any subsequent operations, such as the payment of a supplier, to be completed manually.

Zetadocs Capture Plus and Zetadocs Delivery Plus editions offer greater opportunities for business process automation and customization.

Zetadocs for Microsoft Dynamics NAV functionality comparison*

Delivery Function	Zetadocs Express	Zetadocs Delivery Essentials	Zetadocs Delivery Plus	Capture Function	Zetadocs Express	Zetadocs Capture Essentials	Zetadocs Capture Plus
Email a report from NAV	●	●	●	Archive an email/file to SharePoint and link it to NAV via drag and drop	●	●	●
Archive sent documents to SharePoint	●	●	●	Full text searching of archived documents for NAV and other users	●	●	●
Fax report from NAV (option)		●	●	Approve documents on screen with workflow	●	●	●
Send a batch of reports from NAV		●	●	Local scanning using a desktop scanner		●	●
Delivery rules based on document type, customer/vendor		●	●	Process batches of emails, files and scanned documents		●†	●
Overlay logos, graphics and letterheads onto NAV reports		●	●	Workgroup scanning into document queues via digital copier		●†	●
Add extra documents into the PDF sent or as email attachments		●	●	Convert captured documents to PDF/A for long term storage			●
Personalize covering email or fax coversheet		●	●	Automated document filing using barcode recognition/OCR (option)			●
Fully customize sending and archiving of NAV reports			●	Route inbound faxes automatically into different queues (option)			●
Automate production and delivery of NAV reports using NAS			●†	Full text searching of scanned documents/graphics attachments (option)			●

*Expected comparative feature set at the time of availability of Zetadocs Express

†Feature planned for future release of Zetadocs for NAV

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Technical Specifications

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