

# Zetadocs for NAV - Purchase Invoice Capture

Automatically scan, split and securely file batches of documents such as purchase invoices to increase staff productivity and improve customer service through instant, on-screen document retrieval.



“ 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.**

Ensuring that document processes run smoothly is key to making sure that your staff are working as efficiently as possible as well as providing a good level of service to your customers. Information such as purchase invoices must be available quickly and easily, and securely stored for long term document retrieval.

Zetadocs for Microsoft Dynamics<sup>®</sup> NAV is an electronic document management solution that reduces the time and costs associated with receiving, processing, archiving and retrieving documents.

## Increase efficiency and reduce costs

Storing paper copies of purchase invoices is costly and takes up valuable office space. It is also a time consuming process both in terms of archive and retrieval, which can adversely affect approval processes and customer service.

Zetadocs allows your received purchase invoices to be automatically scanned and archived, drastically reducing the time taken to store these documents and make them available for review. Using printed sticky labels, Zetadocs produces unique barcodes which are then applied to the purchase invoice so that it can be scanned and automatically linked to its relevant transaction in NAV.

Batches of purchase invoices of differing lengths can also be handled by automatically splitting the purchase invoice upon recognition of a new barcode. Automatically filing information in this way reduces administration time and removes the risk of human error. It can also be used to initiate a workflow, such as document approval.

## Improve purchase invoice access and security

Sharing purchase invoices can be a difficult task, and often leads to items being copied at additional expense. If these documents are not handled securely, this can also leave sensitive information openly accessible.

By storing purchase invoices electronically in a central location, they can be quickly and easily accessed on-screen, reducing the need to print, copy and distribute separately. Security levels also ensure that sensitive information is only accessible by authorized personnel.

## Speed dispute resolution

Ensuring that the right people have access to the right purchase invoice at the right time is essential to resolving any disputes quickly. Storing purchase invoices across multiple locations, with few staff having access to them makes answering queries harder, and can lead to dissatisfied customers. It's

### The benefits of Zetadocs:

- **Increase efficiency and reduce costs** with automated purchase scanning, splitting and archiving.
- **Improve information access and security** with instant, on-screen access by authorized personnel.
- **Speed dispute resolution** by ensuring that more staff have access to the information they need to answer queries.
- **Ensure the integrity of documents** by electronically storing purchase invoices for back-up.
- **Ease compliance and process management** through automatic archiving and indexing of documentation.



better to have everything available on screen instantly.

Once a purchase invoice has been automatically scanned and stored, it can be quickly and easily retrieved from within NAV or from SharePoint® - alongside other key information. By having a full picture readily available, disputes or queries can be handled and resolved as quickly as possible.

## Reduce the risk of lost or misfiled purchase invoices

A paper-based archive system can often be prone to purchase invoices being lost or misfiled. It also leaves your company exposed to information being lost forever in the event of disasters such as fire or flooding.

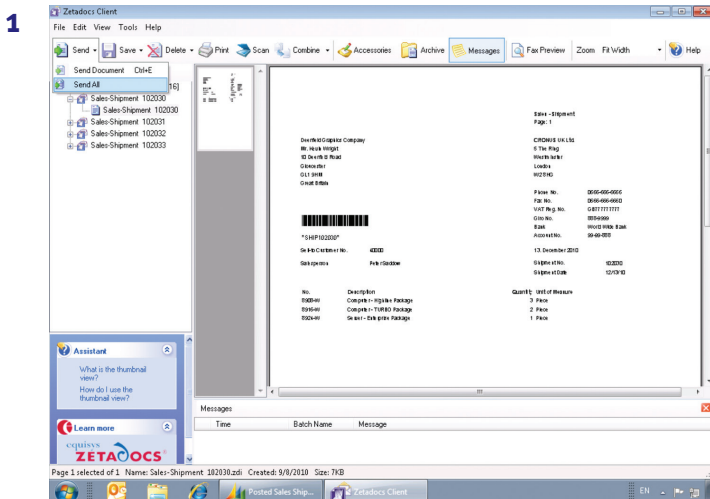
Using Zetadocs to automatically file purchase invoices eliminates the risk of documents being misfiled or lost. The unique identifier is used to automatically link the information to the relevant record in NAV, ensuring that the document is securely associated to the correct transaction. With the invoices now electronically stored, this also means that they can be included in the relevant system back-ups to ensure that no information is lost.

## Ease compliance with regulations and improve process management

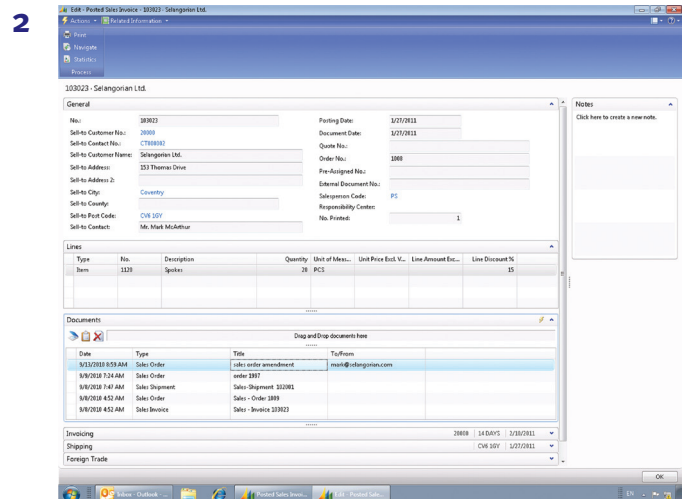
For many organizations, strict legal compliance and process management is essential to customer relations and often requires documentation to be appropriately stored for quick and easy retrieval.

By ensuring that access to purchase invoices is controlled, Zetadocs can help to support these requirements as well as ensure data integrity and provide speedy data retrieval.

## Purchase Invoice Capture with Zetadocs



Zetadocs allows unique 'identifiers' such as barcodes to be placed on the purchase invoices, allowing them to be automatically identified, archived and linked in NAV and SharePoint.



Archived invoices are immediately available for on-screen access either from within NAV, or via SharePoint.

## Technical Specifications

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

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

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