Zetadocs for NAV - Proof of Delivery Capture

Automatically scan, split and securely file batches of documents such as Proof of Delivery (POD) notes 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 the Proof of Delivery (POD) process runs smoothly is key to making sure that your staff are working as efficiently as possible and providing a good level of service to your customers. Information must be available quickly and easily, and securely stored for long term document retrieval.

Zetadocs for Microsoft Dynamics® 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 POD documents 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 POD documents to be automatically scanned and archived, drastically reducing the time taken to store these documents and make them available for review. Documents can either be created with a unique identifier, such as a barcode, or sticky labels can be used to apply a barcode to the document so that it can be scanned and automatically linked to a transaction in NAV.

Multiple PODs of differing lengths can also be handled by automatically splitting the document 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 access and security

Sharing POD documents 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 these documents electronically in a central location, PODs 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 information at the right time is essential to resolving any disputes quickly. Storing POD documents across multiple locations, with few staff

The benefits of Zetadocs:

- **Increase efficiency and reduce costs** with automated POD 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 POD notes for back-up.

- **Ease compliance and process management** through automatic archiving and indexing of documentation.

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Capture. Deliver. Share.

having access to them makes answering queries harder, and can lead to dissatisfied customers. It's better to have everything available on screen instantly.

Once a POD 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. You could even provide a 'self-service' option to allow information to be accessed via a portal.

Reduce the risk of lost or misfiled documents

A paper-based archive system can often be prone to documents 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 PODs eliminates the risk of items 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 PODs 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.

Electronic filing of documentation such as PODs can ease compliance, ensure data integrity and provide faster data retrieval. And because access to all documents can be fully controlled, Zetadocs helps to support your process management goals and ensure regulatory compliance.

Proof of Delivery Capture with Zetadocs

1
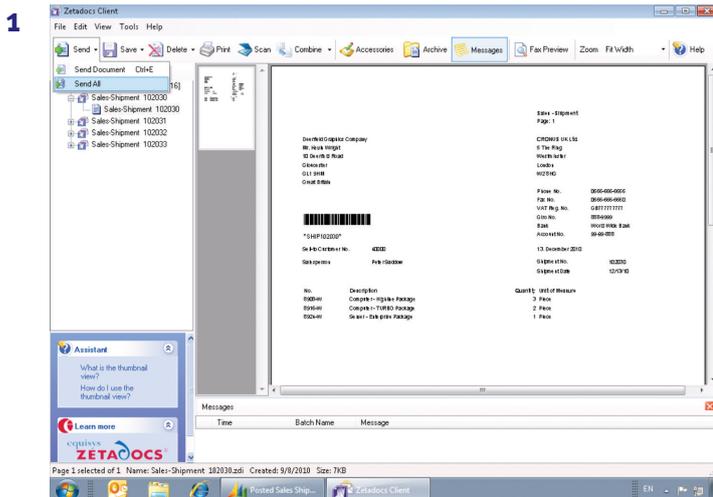
Zetadocs allows unique 'identifiers' such as barcordes to be placed on the PODs, allowing them to be automatically identified, archived and linked in NAV and SharePoint.

2
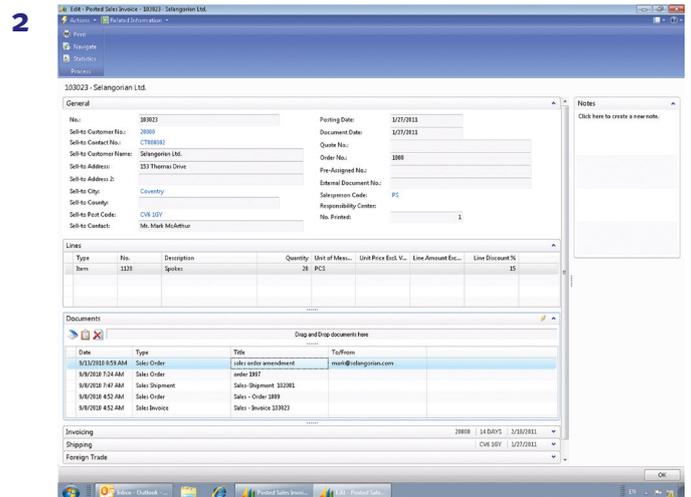
Archived PODs are immediately available for on-screen access either from within NAV, or via SharePoint.

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