

# Zetadocs for NAV - Purchasing automation

Zetadocs enables you to switch to managing purchasing via email and reduce printing, postage and related filing costs. Track all documents in a transaction to speed up purchase approval and help control cash flow.



“ We considered a number of possible solutions but only Zetadocs provided the combined fax and email functionality that we were looking for. The seamless integration with NAV was also a key influencing factor. ”

**Ian Holmes, Becker UK Ltd.**

Efficient management of purchasing is key to the smooth running of your business finances. Moving from paper processes to electronic management could significantly reduce annual operating costs and improve the efficiency of your finance team.

Zetadocs for Microsoft Dynamics<sup>®</sup> NAV is an electronic document management and delivery software solution that replaces paper based processes used by many businesses to manage financial transactions.

## Batch order delivery

For many organizations, manually creating, printing and faxing purchase orders is a time consuming and costly process. Zetadocs for NAV allows orders to be created and then added to a document queue. They can then be sent as a batch in a single process based on rules that can be customized specifically for each supplier. For example, delivering by email, to a specific contact with customized attachments.

Zetadocs automatically populates the relevant contact information for orders, picks the order number from NAV, and automatically attaches documents such as conditions of purchase. One click then sends the order, updates NAV and electronically archives a copy of the order, linking it back to the record.

## Secure electronic filing

Once an order is placed, the supplier often sends information such as email confirmation of the order and shipment dates, or a packing note that arrives with the delivered goods. With information arriving in different formats it can easily become fragmented which hinders retrieval, and leads to delays in the purchasing process.

Zetadocs for NAV allows this information to be quickly and easily captured and archived against the NAV record, for quick and secure retrieval. For example, email confirmations can be dragged and dropped against the NAV record, and packing notes can be signed to confirm delivered goods, scanned and also archived electronically.

## The benefits of Zetadocs

- **Faster purchasing and payment management** by linking documents, information and records in a transaction to speed up purchase approval and help finance teams stay on top of cash flow.
- **Ensure all information is held centrally** by capturing information such as email confirmations or signed packing notes.
- **Enhanced document management** by enabling your non-NAV users to track documents relevant to each stage of a purchase process without the need to involve the finance team.
- **Significantly lower document delivery costs** by automating the process of managing purchasing via email to reduce printing, postage and related filing costs.



## Purchase process tracking

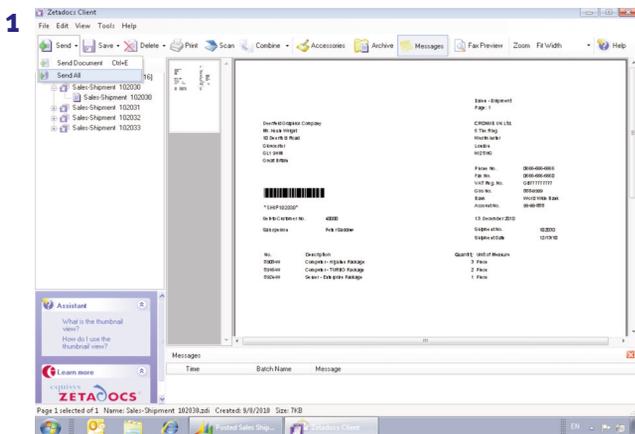
Capturing this information using Zetadocs for NAV allows the finance team to retrieve all associated documents during the approval process. The original order, along with information such as email confirmations or signed packing notes are available to view from within NAV, allowing payments to be quickly approved. Information can also be made available to non-NAV users, allowing more people to see the status of purchases.

Accounts payable can then automate the process of delivering remittance notifications using Zetadocs for NAV. After running the remittances report, the documents are added to the Zetadocs document queue which will then automate the delivery of remittances to the supplier. Again rules can be set up determine exactly how this type of document is sent; by email or fax, personalized to a specified contact and with specific attachments added.

## Zetadocs for NAV editions

Zetadocs for NAV Delivery Essentials and Capture Essentials provide off-the-shelf functionality to help organizations streamline their purchasing processes. Also available are Zetadocs for NAV Delivery Plus and Capture Plus which then allow full automation of document delivery and capture, or customization to meet specific organization or industry requirements.

## Purchase automation with Zetadocs for NAV

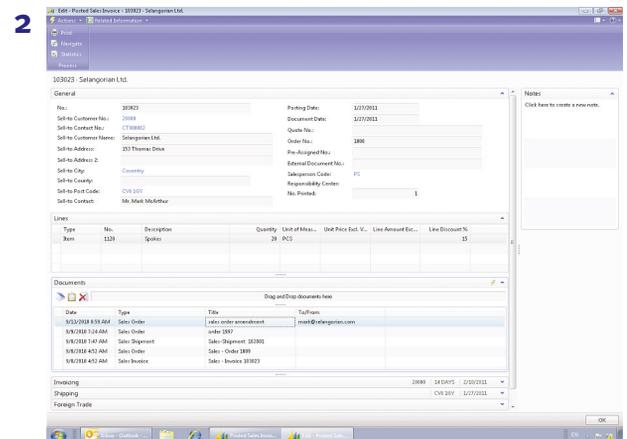


*Zetadocs personalizes the orders and then delivers them automatically with attachments.*

## Technical Specifications

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

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



*Zetadocs enables users to quickly find orders, invoices and all related information such as email confirmations or packing notes signed to confirm received goods.*

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