

# Zetadocs for NAV Capture Essentials

Improved customer service through electronic filing of inbound information for fast, efficient retrieval in Microsoft Dynamics NAV or SharePoint.



“ 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 for Microsoft Dynamics® NAV Capture Essentials allows inbound documents, faxes and emails to be quickly and easily linked to a record in NAV via drag-and-drop. Filing this information electronically ensures secure storage in a central repository for instant access from within NAV or SharePoint®, allowing customer queries to be handled quickly and efficiently by more staff. Electronic filing also removes the need for expensive storage systems, and allows more paper to be recycled which helps meet sustainability targets.

## Document archiving

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. Zetadocs for NAV Capture Essentials allows incoming documents to be dragged and dropped against a transaction or customer record, ensuring that all information can be quickly and easily retrieved from within NAV or SharePoint.

## Document processing

The management of paper documents and emails that flow through sales and purchasing processes can be extremely time consuming, with information held in different systems and different locations. With Zetadocs for NAV Capture Essentials, 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, providing a complete picture which speeds up the entire process.

A paper-based document authorization process can also take a significant time to progress, and is prone to lost documents, errors and delays. Zetadocs allows this information to be viewed on-screen, reducing the risk of lost documents and saving time for users involved in the approval process.

## The advantages of Zetadocs for NAV Capture Essentials

- **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.
- **Ease compliance to corporate and regulatory guidelines** by efficiently filing all documents electronically.
- **Reduce your carbon footprint** by recycling more paper, and removing the need to print emails etc.



## Corporate and regulatory compliance

Compliance to corporate and regulatory guidelines requires documentation to be quickly and easily available for review. By storing documents electronically against the NAV transaction or record, information is quickly and easily available which eases the compliance process. When used in conjunction with Zetadocs for NAV Delivery Essentials or Delivery Plus, all information relating to a specific transaction is held in the same place and instantly available.

**Technical Specifications**

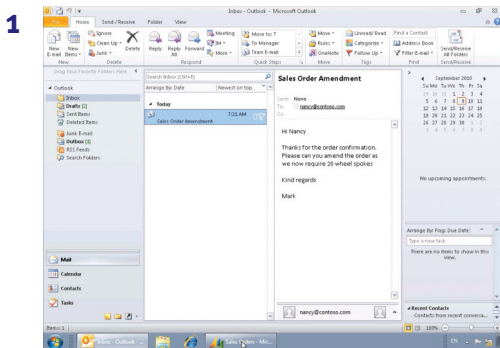
For details of supported platforms and other system requirements, please visit:

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

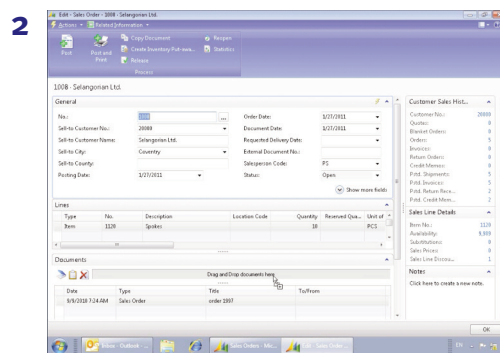
## Extended functionality

Zetadocs Capture Plus allows the capture of documentation to be fully automated. For example, an identifier such as a barcode can be used to automatically link an incoming document, fax or email to a customer record and trigger an approval process. For more information, view our Zetadocs for NAV Capture Plus datasheet.

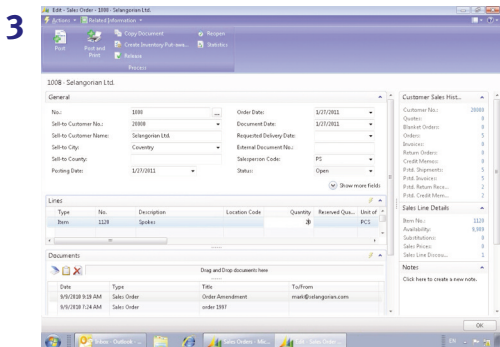
## Sales order processing with Zetadocs for NAV Capture Essentials



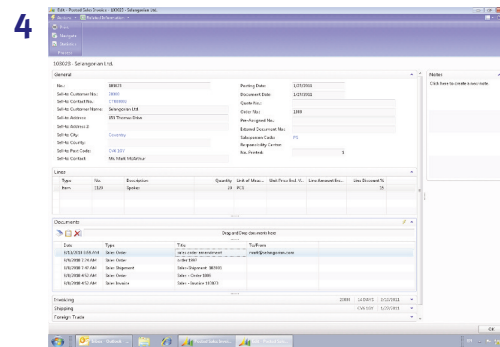
*Email updates such as order amendments can be quickly and easily captured in NAV.*



*Email can be dragged and dropped to the Documents area of the Sales Order.*



*The order can now be amended with a record of the request stored in NAV.*



*All information relating to the sales order can then be reviewed either in NAV, or in SharePoint.*

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