



Zetadocs Applications

The power of Document Management in use in your business

Zetadocs, the document management product that automates the production and delivery of business documents, adds real value to any Dynamics NAV solution.

To give you an idea of what Zetadocs can offer your business, we've put together some examples of how it enhances the processing in key areas – purchasing automation, invoicing automation and collections management.

Introduction

The real value of Zetadocs is not in the technical solution it offers but in the automation that it delivers – saving you time, hassle and expense.

To demonstrate how powerful Zetadocs is when used alongside your Dynamics NAV installation, we've taken three areas of your normal business processing and outlined how Zetadocs will work and what it will deliver.

Purchasing Automation

Zetadocs enables you to manage your purchasing via email and reduce printing, postage and related filing costs. It will allow you to track all documents in a transaction, to speed up purchase approval and help control cash flow.

Invoice Automation

Zetadocs helps you to carry out your invoicing via email, helping to eliminate printing and postage costs. It will allow you to track all documents in a transaction, to speed up query resolution and help improve credit control.

Collections Management

Streamline your collections process by automating invoicing and delivery of other financial documents using Zetadocs.

Cut the cost of printing and postage and track transactions from a searchable electronic archive.

Let's take a look at how Zetadocs works in each of these areas in more detail.

Purchasing Automation

Efficient management of purchasing is key to the smooth running of your business finances.

A switch from manual, paper processes to electronic management could significantly reduce your annual operating costs and improve the efficiency of your finance team.

Deliver orders in batches

Zetadocs uses a unique document queue that enables NAV users to manage the delivery of orders in batches. Once orders are created they are added to the document queue.



They can then be sent to the supplier in a single process based on rules that can be customised specifically for that supplier.

For example, delivering by email, to a specific contact, with customised attachments.

Zetadocs automatically picks the relevant contact information for this type of document and the order number from NAV and pre-populates the email. It also automatically attaches documents (e.g. conditions of purchase).

One click sends the order, updates the NAV software and saves a copy of the order into SharePoint (or a network folder) linking it back to the record.

Streamline Accounts Payable

Zetadocs helps streamline the Accounts Payable process by enabling users to link invoices to original orders.

For example, once a supplier has shipped their goods and sent the invoice, Zetadocs enables the accounts payable employee to quickly locate the original order, check against the invoice and confirm that goods

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Zetadocs is the right solution for NAV users.

It helps you to reduce the costs associated with producing and handling paper documents, to improve efficiency and enhance customer service.

Zetadocs integrates with SharePoint to enable secure storage and fast document retrieval by authorised network users.

received match the original order and the invoice. They are then able to quickly authorise payment.

Accounts payable can then automate the process of delivering remittance advices using Zetadocs. 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 to determine exactly how this type of document is sent; by email or fax, personalised to a particular contact and with specific attachments.

Tracking the purchase process

Zetadocs adds real value by making copies of orders, invoices and remittances available to any authorised employee via SharePoint (or via access to the relevant network folder) so that they can track each stage of the purchase process.

For example, the manager who originated the purchase can check and confirm that the goods received match the original order and the invoice.

Invoice Automation

The true cost of managing business processes on paper is nowhere more apparent than in your finance and accounts team. Invoicing from NAV on paper can cost your business dearly.

Zetadocs replaces the traditional system of printing and posting invoices by delivering them electronically, directly from NAV. Zetadocs can deliver single invoices but its real power is in the intelligent delivery of invoices in batches.

Zetadocs personalises the delivery of batches of invoices according to recipient requirements and preferences, including overlaying stationery, adding attachments and populating the addressing details, email subject line and body.

One click sends the invoices, saves a copy of the invoice into SharePoint and updates NAV. The invoice is linked back to the NAV record (for non-SharePoint users, they are archived to a network folder).

This function adds value by streamlining business processes and cutting administration time.

For example, if a customer calls and queries an invoice against goods that were shipped, the user can check the posted

invoice and check the Zetadocs archive directly from the NAV application.

This will retrieve any documents from SharePoint that are related to that transaction.

Improving customer service

Zetadocs can also help you improve customer service by letting colleagues, that normally do not have access to the NAV software, find financial documents.

For example, if a customer service agent needs to quickly find a copy of an invoice, they can search SharePoint with any information that they have about the document such as invoice number or customer name.

This will also find any related document linked to this invoice to help quickly resolve any query, avoid delays or disputes.

Collections Management

Effective collections processes are critical to the financial stability of your business. Automation of these processes could save your business a small fortune each year.

Batch order processing

Zetadocs lets users send invoices and other financial documents electronically from NAV, singly or in batches, reducing the cost of delivery and cutting out delays in preparation and printing.

Streamline statement runs

One of the key tools in managing collections is the statement run. As with invoices, Zetadocs enables the NAV user to automate the preparation and delivery of statements so that they get completed on time, making your customers more likely to pay more quickly.

Create a transparent process

Zetadocs links all related documents in a transaction making tracking and retrieving simple.

By default, all financial documents are archived so that users with access to SharePoint or the relevant network folder can see the right documents on screen at the right time. This makes the whole transaction transparent.

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