Next generation document capture

AP automation with SharePoint archiving

Zetadocs Capture

AP automation

Accelerate invoice processing with next generation document capture, automatic order matching and simple invoice approval.

Zetadocs uses Microsoft Azure AI Document Intelligence, which applies advanced machine learning to extract text from vendor invoices automatically. There are no templates to set up for each vendor, meaning set up takes hours rather than days.

Invoice data, extracted by Zetadocs from vendor invoices (header and line information), is entered automatically and accurately into Microsoft Dynamics 365 Business Central.

Zetadocs offers instant, automated line level matching of invoice, order and receipt documents that is simple to use, ensuring accurate and timely payments to vendors.

The original vendor invoices are archived in SharePoint in Microsoft 365 and are easily retrieved via the Zetadocs FactBox on the purchase invoice inside Business Central.

Zetadocs provides a more convenient and quicker way for invoices to be approved. Approval happens inside Business Central, where original documents are instantly visible and can be checked for accuracy. This reduces the need to manually chase approvers.

More ways to capture documents

Documents such as emails, PDFs and images can be dragged and dropped directly onto records in Business Central. Each document will be stored securely in SharePoint, linked to its transaction for easy access from within Business Central.

Paper documents can be scanned in batches and processed easily within Business Central, so that original documents are filed against relevant records. Documents can be 'checked out' whilst being processed – protecting against inadvertent posting or deletion by another team member.

With Zetadocs Capture Plus edition, the recognition and filing of batches of paper documents can be automated, using barcoded sticky labels, to save processing time.

At a glance

AP automation with smart invoice capture, automatic order matching and simple invoice approval

Intelligent OCR technology to extract invoice data using Azure AI Document Intelligence

Automated data entry with no vendor templates to configure and maintain

'Drag & Drop' email and files to store them in SharePoint® linked to Microsoft Dynamics® for easy access

Capture documents via any Business Central client in the office/on the go

Batch process emails, e-documents and scanned paper documents

Automate the filing of documents, splitting batches using barcodes

Search and retrieve fast with configurable metadata

Customize to meet your individual requirements

Get it from Microsoft AppSource

Microsoft Azure

Technical Information

For details of supported platforms and other system requirements, please visit:
www.equisys.com/zdtechinfo

Secure storage using Microsoft 365®

Zetadocs archives documents in SharePoint to remove the inefficiencies caused by documents being spread across different locations. Documents can be retrieved via a FactBox in Business Central or from SharePoint directly – giving easy access to both finance teams and other staff who don't use Business Central.

Powerful search and retrieval

Ensuring that the right people have access to the right documents at the right time helps customer service teams to deliver outstanding service and quickly resolve any disputes that arise. Storing paper documents across multiple locations can mean few staff have access to them, making it hard to answer customer queries. Zetadocs stores all documents in one central archive.

Document metadata is applied automatically and consistently every time you capture documents with Zetadocs. This ensures customer information is always available for search and retrieval across your organization, which is particularly useful for those customer service or project teams that need access to financial documents normally held within Business Central.

Documents are stored in a configurable folder structure to reflect your work processes. With the Zetadocs Capture Plus edition, that folder structure can be customized according to the specific requirements of your business, such as making those documents available on a customer portal.

Seamless integration with Business Central & SharePoint

Zetadocs is designed for Business Central and ready to go. This means you don't need to leave Business Central to capture electronic or paper documents. It is simple to drag and drop files and emails onto records in Business Central, or to use multi-user document queues for the batch processing of electronic or scanned paper documents. All documents are securely stored in SharePoint and visible in the Zetadocs Documents FactBox in Business Central.

Features

AP automation & capturing documents with Zetadocs	Zetadocs Express	Capture Essentials	Capture Plus
Drag & drop emails and files, and store in SharePoint† with links to Business Central or NAV	●	●	●
Capture documents using the Web client or mobile app on devices, in the office or on the go	●	●	●
AP Automation* for rapid invoice processing in Business Central, with automated data entry and order matching		●	●
Intelligent OCR* for extracting document data using Azure AI		●	●
Configure metadata for better indexing and filtering of documents in SharePoint		●	●
Configurable folders by date/customer/type to organize your SharePoint archive		●	●
Batch process emails, files and scanned documents using multi-user document queues		●	●
Automate filing of documents, splitting batches using barcode recognition and OCR‡			●
Customize to meet your individual requirements using the Zetadocs Capture SDK‡			●

* Requires the AP automation add-on and is only available when using Business Central v14 or later.
† Archiving to network folders is an alternative option when using Dynamics NAV deployed on premise only.
‡ Requires Zetadocs Capture Plus and customization by an Equisys Solutions Partner using the SDK.

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