

Electronic Invoicing

Eliminate time-consuming and cumbersome invoicing processes



Reduce document delivery and filing costs

Sending paper invoices is time-consuming and costly. The direct costs of paper, consumables and postage, and the time it takes to print, collate, package and post invoices and then file copies means this is an expensive process. What's more, paper invoices can take days to reach customers, who would increasingly prefer electronic copies instead.

Zetadocs delivers invoices electronically, directly from Microsoft Dynamics 365 Business Central or Microsoft Dynamics NAV. In addition emailing to single invoices, Zetadocs can schedule the delivery of personalized batches of invoices, based on the recipients' requirements and preferences. Consolidate duplicate recipients in the batch, add attachments like Terms & Conditions, set the From: address so that replies can be received to a shared mailbox, and populate the address details and email with consistent content. Just a few clicks sends all of the invoices in a batch, or sets up an automated process that runs as a background task. Zetadocs will email the invoices, update Business Central or NAV and archive a copy of each invoice electronically.

Easily access all information

With ever more orders and updates being received via email, important information can be isolated in an individual's email account or even printed off to be held in paper files. This means that information can be lost, hidden away or inaccessible when it is needed.

Zetadocs allows emails and file attachments relating to the sales process to be dragged and dropped to Business Central or NAV records. Paper documents can be scanned into multi-user document queues for processing. All these documents will be automatically archived alongside copies of invoices sent, with links to the appropriate ERP records for swift retrieval from within Business Central or NAV, SharePoint or network folders. All information is available instantly to all authorized staff, from a secure and central location.

Achieve real customer service improvements

Often, a customer's query can only be handled by the finance team who have access to the ERP software. This introduces complications and can cause delays, which can impact customer satisfaction or even delay payment. Zetadocs enables a wider group of your staff to help out by having copies of all relevant documents for each sale held centrally for search and rapid retrieval.

At a glance

Reduce costs by not printing invoices, and no need for postage or filing costs

Increase efficiency as time spent preparing and sending invoices can now be spent on other finance tasks

Improve customer service by having sales documents available on screen to respond more quickly to enquiries

Seamless integration with Microsoft Dynamics® 365 Business Central or NAV means there's no need to leave the application to send documents, or view and capture incoming documents

Send professional emails personalized using email templates with attachments, ensuring documents are delivered with consistent content, every time

Support faster payment with invoices delivered instantly to customers' email inboxes to reduce the time between sending an invoice and getting paid

Reduce carbon footprint by eliminating paper from invoicing processes to help your organization meet its sustainability targets



Technical Information

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

When a member of the customer services team needs to find a copy of an invoice, they can search with information such as the invoice number, purchase order number or customer name. Aside from retrieving the invoice, they will also be presented with any related information linked to the invoice to help them quickly resolve any query, and avoid delays or disputes.

Seamless integration with Dynamics

Zetadocs is built for Dynamics, meaning there's no need to leave the app to send out batches of invoices, see the delivery progress of these emails using the Zetadocs Outbox, or view archived copies in the Zetadocs Documents FactBox.

Contact details and preferences are taken directly from Business Central or NAV, to save you from having to maintain multiple contact lists. Zetadocs has flexible delivery rules where the default contacts details for a customer can be overwritten according to the type of document, and therefore sales quotes could be sent to different contacts from sales invoices, and extra contacts can be set up to receive copies of selected reports such as statements showing overdue payments.

Zetadocs supports all Business Central and NAV clients, so no matter if you are using the Business Central web client, the Business Central app on devices or even the NAV Windows client installed directly on your desktop or streamed to your PC via ClickOnce, you can use Zetadocs to send and capture documents electronically.

Zetadocs can also be customized to meet individual requirements, with invoices over a certain value perhaps being copied automatically to the sales director, or the template and attachments applied being based on what's been invoiced, or documents being filed in a custom folder structure in the electronic archive with controlled access for customers via a portal.

Features

Delivering documents with Zetadocs	Zetadocs Express	Delivery Essentials	Delivery Plus	Electronic Invoicing
Email any report as PDF directly from Dynamics, saving copies automatically to the electronic archive	●	●	●	●
Deliver documents in batches by email or hard copy to match customer preferences		●	●	●
Send from the NAV Web client or any of NAV's HTML clients, in the office or on the go*		●	●	●
Flexible delivery rules to add additional email recipients (TO/CC/BCC) or set the From address		●	●	●
Consolidate multiple documents to the same recipient within a batch, so they receive one email*		●	●	●
Add attachments automatically such as terms & conditions or other supporting documents		●	●	●
Personalized email subject and message using templates guarantees consistent delivery content		●	●	●
File copies into configurable folders (date/customer/type) in an electronic archive		●	●	●
Scheduled delivery of invoices or other Dynamics reports, sent in the background automatically†			●	●
Customizable to meet your individual requirements using the Zetadocs Delivery SDK†			●	●
Capture incoming documents against their relevant Dynamics records with drag and drop or multi-user queues to link scanned documents‡				●

* Dynamics NAV 2015 and later.

† Requires the additional purchase of Zetadocs Delivery Plus and customization by Equisys Solutions Partners using the SDK.

‡ Zetadocs Document Queues require the additional purchase of Zetadocs Capture Essentials. Capture Essentials can be upgraded to Zetadocs Capture Plus to fully automate the linking of incoming documents with barcodes. Zetadocs Capture Plus requires customization by Equisys Solutions Partners using the SDK.

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