

Proof of delivery

Improve customer service with on-screen access to signed delivery notes



Automated filing

A key part of providing great customer service is being able to answer delivery queries quickly and accurately. Automating the filing of Proof of Delivery (POD) documents and then providing on-screen access to them helps your staff deliver excellence while working more efficiently.

Zetadocs is an electronic document management solution that reduces the time and costs associated with receiving, processing, archiving and retrieving incoming documents, emails and faxes. For users of Microsoft Dynamics® 365 Business Central and Microsoft Dynamics NAV, it offers an effective solution for improving Proof of Delivery processes.

Speedy dispute resolution

Ensuring that the right people have access to the right documents at the right time is essential to resolving any disputes quickly. Storing paper POD documents across multiple locations, with few staff having access to them, makes answering customer queries harder. This can lead to dissatisfied customers. It's better to have everything available on-screen instantly.

Zetadocs allows POD documents to be created with a barcoded unique identifier that allows the document to be automatically identified, archived and indexed against the relevant record in Business Central or NAV upon its return.

Once stored, the POD can be quickly and easily retrieved from one central place, either within Business Central, NAV or from SharePoint - along with other key information such as the sales order or invoice. By having a full picture readily available, disputes or queries can be handled and resolved as quickly as possible. You could even provide a 'self-service' option to allow customers to access this information via a portal.

Increase efficiency and reduce costs

Storing paper copies of original POD documents is costly and takes up valuable storage space. In addition, it takes time to retrieve paper documents, especially if they have been misfiled. Archiving documents electronically is a better way of storing documentation, providing that scanning and filing is fast and reliable.

Barcoding each document with a unique identifier enables Zetadocs to split a batch of scanned documents automatically and file each one accurately.

At a glance

Speedy dispute resolution by ensuring that the right people have access to the right documents at the right time

Increase efficiency and reduce costs with automated document archiving and instant, on-screen access

Ensure the integrity and security of your documents by electronically storing documents for back-up

Ease compliance with legal regulations and quality standards through automatic archiving and indexing of documentation



Technical Information

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

This drastically reduces the time required to process PODs and also removes the risk of misfiling as a result of human error. The automated filing process could also initiate a workflow, such as the invoicing process or a customer satisfaction call.

Reduce the risk of lost or misfiled documents

Documents can get mislaid in a paper-based document archive system due to human error. Also, if you only use conventional paper files, your company is exposed to the risk of information being lost forever in the event of a disaster such as fire or flooding.

Automated electronic filing both eliminates the risk of documents being misfiled and makes comprehensive system back-ups viable to ensure documents are never lost.

Ease compliance with regulations and standards

For many organizations, compliance with quality standards such as ISO 9001 are essential to customer relations, meaning that documentation must be appropriately stored for quick and easy retrieval. What's more, data protection laws and other legal requirements must be strictly followed to avoid fines and penalties.

Electronic filing of documentation eases compliance to such standards, helping ensure data integrity and ease of retrieval. Access to all documents can be fully controlled, ensuring data is protected to relevant legal and regulatory requirements.

Features

Capturing documents with Zetadocs	Zetadocs Express	Capture Essentials	Proof of delivery
Drag & Drop emails and files , stored electronically with links to Business Central or NAV	●	●	●
Capture paper documents with locally attached scanners directly into Business Central or NAV		●	●
Capture documents using the Business Central web client or mobile app on devices, in the office or on the go*		●	●
Batch processing of emails, files and scanned documents using multi-user document queues		●	●
PDF/A conversion of documents for long term archiving compliance and improved searchability		●	●
Configurable metadata for better indexing and filtering of documents in SharePoint		●	●
Configurable folders by (date/customer/type) to organize your electronic archive		●	●
Automated filing of documents , splitting batches using barcode recognition and OCR†			●
Customizable to meet your individual requirements using the Zetadocs Capture SDK†			●

* All Business Central and NAV clients are supported, including the web client, the apps for phones and tablets, the Windows client installed directly or via ClickOnce, and the classic client.

† Proof of Delivery requires the purchase of Zetadocs Capture Plus and customization by Equisys Solutions Partners using the SDK. Automated processing of the Zetadocs Document Queues available from Dynamics NAV 2015.