Proof of Delivery
Improve customer service with onscreen access to signed delivery notes

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 for Microsoft Dynamics NAV is an electronic document management solution that reduces the time and costs associated with receiving, processing, archiving and retrieving incoming documents, emails and faxes. It offers an effective solution for improving Proof of Delivery processes.

Speed 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, and 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 NAV upon its return.

Once stored, the POD can be quickly and easily retrieved from one central place, either within 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.

At a glance

Speed 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.

Certified for
Microsoft
Dynamics
NAV

Technical Information

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

Barcoding each document with a unique identifier enables Zetadocs to split a batch of scanned documents automatically and file each one accurately. This drastically reduces the administration time required and also removes the risk 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. But just using conventional paper files also leaves your company exposed to information being lost forever in the event of disasters 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.

For more information on Zetadocs for NAV, please visit www.equisys.com/zetadocs or watch the YouTube video from Equisys on proof of delivery tracking.

Capturing documents with Zetadocs	Zetadocs Express	Capture Essentials	Proof of Delivery
Drag & Drop emails and files, stored electronically with links to NAV	●	●	●
Capture paper documents with locally attached scanners directly into NAV		●	●
Capture on the go or in the office with the NAV Web client or any of NAV's HTML clients *		●	●
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 organise your electronic archive		●	●
Automated filing of documents, splitting batches using barcode recognition and OCR **			●
Customisable to meet your individual requirements using the Zetadocs Capture SDK **			●

Dynamics NAV 2015 and later with separately purchased subscription to Office 365 for your electronic archive

** 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.