Sales Order Processing
Improve response times with all sales documents on screen

Efficient processing and management of sales orders is vital to your customer relations and business growth. Sales orders can arrive via fax, post or email, and processing them can be a costly, manual and time-consuming process. If you process your orders quickly, efficiently, and correctly every time, you will not only generate revenue more quickly, you will also promote better customer satisfaction, which leads to repeat business.

Capture and file customer documents accurately

Customers' purchase orders arrive in the finance team via a number of methods. The management of the paper documents and emails that flow through your sales processes can be extremely time consuming. The cost of filing, indexing, retaining and retrieving documents within an organization can add significant overhead, especially if all of the documents that relate to a specific transaction or customer are stored in different locations and different formats.

Zetadocs for Microsoft Dynamics® NAV allows emails, electronic faxes or scanned orders to be centrally processed using multi-user document queues, improving order visibility and accurate filing. For lower volumes simply drag and drop documents received against the NAV record, automatically archiving the information and creating links to enable swift retrieval from within NAV or the electronic archive directly.

Reduce document delivery and filing costs

Delivering paper documents is time-consuming and costly. The direct costs of paper, consumables and postage, the time it takes to print, collate, package, post and then file documents adds significant costs to the process. Paper documents can take days to reach the customer which adds further delays.

Zetadocs for NAV delivers your order confirmations and invoices electronically, directly from NAV in personalized consolidated batches based on the recipients' requirements and preferences, and can include your business terms too. This ensures that all information relating to the transaction is instantly available on screen, providing you a complete picture.

At a glance

Reduce costs related to filing, indexing, storing and retrieval of order-to-cash documents, by capturing incoming email orders and scanned paper documents electronically

Increased efficiency of the sales order process and time spent sending confirmations, filing documents and retrieving evidence can now be spent on other finance tasks

Improve customer service by moving customer dialogue on screen and responding more quickly to enquiries with all related documents instantly available within NAV and the electronic archive

Seamless integration with Dynamics NAV means you don't need to leave the application to send documents or view and capture incoming documents

Reduce your carbon footprint by eliminating paper from your sales order process can help your organization meet sustainability targets

Certified for
Microsoft
Dynamics
NAV

Technical Information

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

Achieve real customer service improvements

Ensuring that the right people have access to the right documents at the right time is essential to resolving any disputes quickly. Storing paper documents across multiple locations, with few staff having access to them makes answering customer queries harder, and this can lead to dissatisfied customers.

With Zetadocs for NAV, all documents are captured and electronically filed alongside their related NAV transaction helping you keep your customer accounts up to date, and allowing you to stay on top of payments and credit control. Order-to-cash information is consistently available instantly to anyone who needs it, from a secure and central location moving customer dialogue on screen where you have everything on-hand, allowing you to quickly resolve any queries, and avoid delays or disputes.

Seamless integration with Dynamics NAV

Zetadocs is built for NAV, so that you don't need to leave the application to capture order-to-cash documents, delivery order confirmations and other sales documents, or view the archived copies in the Zetadocs Documents FactBox.

Zetadocs supports all NAV clients, so no matter if you are using the NAV Windows client that's installed on your desktop, streamed to your PC via ClickOnce or even the NAV Web client, you can use Zetadocs to send and capture documents electronically.

Zetadocs can also be customised to meet your individual requirements, so that captured and delivered documents are filed automatically to a custom folder structure in the electronic archive, or set additional business specific information to aid retrieval from SharePoint.

Features

Capturing and delivering documents with Zetadocs	Zetadocs Express	Capture Essentials	Capture Plus	Sales Order Processing
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 **			●	●
Deliver documents in batches by email or hard copy to match customer preferences ***				●

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

** requires the additional purchase of Zetadocs Capture Plus and customization by Equisys Solutions Partners using the SDK*

*** Batch delivery of NAV reports require the additional purchase of Zetadocs Delivery Essentials. Delivery Essentials can be upgraded to Zetadocs Delivery Plus to schedule delivery of NAV reports, sent in the background automatically. Zetadocs Delivery Plus requires customization by Equisys Solutions Partners using the SDK.*