

Zetadocs Expenses Implementation Services

Predictable outcomes and
professional support

Zetadocs Expenses



Purchasing an implementation and support plan will ensure your Zetadocs Expenses Express system is setup correctly and the integration with Business Central is carried out and supported by professionals.

Predictable outcomes

We have created this packaged service to get Zetadocs Expenses Express installed, configured and tested in your Business Central sandbox environment so that you are up and running more quickly than if you undertook the implementation yourself.

Our packaged implementations follow our proven methodology, and thanks to their fixed scope of work, we can better predict the outcome. We take the risk out of you paying for implementation overruns, excluding any factors outside our control as you'd expect.

Satisfied customers

Customer satisfaction is paramount to us. Together, we help ensure you are delighted with our products and services. We do this by ensuring that you are clear on the scope of work ahead of the implementation, managing expectations during implementation and securing formal acceptance of the solution at the end.

Only then do we formally handover to our customer support team, who manage the ongoing relationship.

Ongoing support

Solutions implemented correctly first time by product specialists should mean you have less need to contact support for help. However, a support plan provides an insurance policy for your system ensuring that it continues to provide maximum benefit to your business.

Although our Express editions have a simpler feature set, they are powerful business tools.

Once adopted by the wider business they can become mission critical. Having experts on hand that can quickly troubleshoot any problems that arise will save precious time and delays whilst looking for the right answer.

Support is provided via email support with a 24-hour response time which can be upgraded to Premium Technical Support for direct telephone support if needed.

At a glance

Predictable outcomes no more worries about the cost of overrunning implementations with packaged services

Satisfied customers implementations performed by product specialists following our proven implementation methodology

Professional support annual support plan included so that you have access to Equisys' team of technical support experts

Quicker response experts that can troubleshoot any problems will save precious time and avoid delays whilst looking for the right answer

Defined Statement of Work (SoW) ensures the smoothest possible integration



Available on
Microsoft AppSource

Technical Information

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

Statement of Work (SoW)

The Zetadocs Expenses Express Statement of Work (SoW) defines the entire scope of the implementation project to ensure the smoothest possible integration of Zetadocs Expenses with your Business Central cloud system.

Install	
Extension for Business Central	Install the Zetadocs Expenses Extension from AppSource into your Business Central sandbox environment
Web service	Secure the web service connection with an existing user or designated users API key
Test connectivity	Ensure secure web service communication before moving to the next stage

Configure	
Zetadocs user accounts	Set up the first Zetadocs user accounts, typically one for each expense role with export code (Vendor Account)
Configure expense types	Configure the same export code (GL Account) for each of the pre-configured expense types
Setup sales tax	Mirror Business Central sales tax rates for standard and zero sales tax rates
Configure mileage	Create mileage rates for business trips in private cars as per government guidelines

Test	
Creation of expenses	Create and submit payment and mileage expenses using the desktop app
Expense approval	Check expenses from email notification and expense report approval ahead of export
Export expenses	Export expenses into Business Central confirming GL account and set sales tax

Train	
Expense system settings	Train expense administrator how to manage the Zetadocs Expenses system settings
Expense app	Familiarize expense administrator with staff training resources and videos
Go live plan	Agree self service go live plan with the expense administrator

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Zetadocs
Expenses



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