

Purchase invoice approval

Accelerate approval times and build better supplier relationships

Zetadocs Approvals



Improved control and visibility

Zetadocs Approvals enables your Accounts Payables team to manage financial approvals on screen, reducing wasted effort and giving them control over the approval of purchase invoices. It's designed for and integrates with Microsoft Dynamics 365 Business Central* and Microsoft Dynamics NAV.

You can instantly see where each purchase is in the approval process, and quickly identify where delays and hold-ups occur that could result in early payment discounts being missed or overdue payment charges being incurred. It's simple to locate overdue approvals and delegate to substitute approvers when necessary to ensure the smooth operation of your supply chain.

Faster purchase approvals

Zetadocs Approvals' intelligent workflow and on screen access streamlines your approval cycle. Purchase documents are authorized faster compared to a paper-based process, and the risk of paperwork getting buried or lost is minimized.

Highly flexible rule-based workflows automatically route documents electronically to the right department or budget holder, wherever they are geographically. Approvers instantly receive email notifications when they have documents to approve, and overdue approvals are chased automatically by email reminders to keep the whole process moving.

Approve anywhere at anytime

Zetadocs Approvals is a cloud service built on the highly scalable Microsoft Cloud, and managed for you by experts to offer a reliable service at anytime from anywhere.

Accessed from all popular browsers, Zetadocs Approvals, in conjunction with Zetadocs Capture, provides instant access to all original documentation relating to a purchase, enabling tighter checks in the approval process.

Approvers can easily review Dynamics purchase documents alongside all captured supporting documentation whilst on the go – all without requiring direct access to Business Central or NAV.

At a glance

Approve on screen faster, more easily and with fewer errors compared to paper-based systems

Identify delays and take immediate action to unblock urgent purchases stuck in the approval process

Set up intelligent workflow to match your approvals process based on approval limits and other Microsoft Dynamics® fields

Use automatic email notifications to keep the whole process moving and remind reluctant approvers when approval tasks are overdue

Approve anywhere at anytime using mobile browsers on phones, tablets or on PCs in the office

Make informed purchasing decisions using original documentation alongside Dynamics business data, without needing direct access to Dynamics

Get set up fast and stay up to date with a cloud service that's managed for you



Technical Information

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

Designed for companies using Microsoft Dynamics

Zetadocs Approvals' light touch integration with Business Central and NAV makes it easy to set up, and simple to implement and manage. The service works with posted or unposted purchase invoices, purchase quotes and purchase orders, and with all your Microsoft Dynamics business data to build highly flexible approval workflows.

There is a simple monthly subscription for each user, without any capital outlay beyond the implementation costs. As Zetadocs Approvals is a cloud service, your business is always on the most up to date version, without the pain associated with upgrading financial and ERP software.

Features	Benefits
Approval dashboard	Monitor the entire approval process on screen, spot overdue tasks or bottlenecks and take action
Flexible approval rules	Define the approval workflow path based on approval limits per vendor or almost any field held in Business Central or NAV
Delegate approvals	Avoid bottlenecks and delays in the approval process by assigning approval tasks to another authorized approver
Overdue email reminders	Save time chasing reluctant approvers and answering the resulting supplier queries with automatic reminders
Anywhere access	Manage approvals wherever you are via the secure browser-based interface that's always up to date, and that is simple to use and understand with little or no training
Multi-stage approvals	Assign approval tasks to additional approvers that match the simplest or most complex business requirements
Original supporting documentation	View all related original documents to make informed purchasing decisions, stored on premise or in the cloud
Integration with Microsoft Dynamics	Surface Business Central and NAV business data to approve purchase orders, quotes, invoices and posted purchase invoices without every user requiring a Microsoft Dynamics license
Simple to setup	Keep set up and configuration time to a minimum with no requirement to adjust the firewall or install and maintain client software
Always up to date	Receive enhancements automatically so you're always on the current version without the cost and disruption of upgrading your Microsoft Dynamics system
Same sign on	Use your Microsoft Office 365 or Azure Active Directory account to simplify access to Zetadocs Approvals and helps you centralize identity management

* Zetadocs Approvals is only available for the on premises version of Business Central

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