

Automated document filing

Instant access to documents in Microsoft Dynamics 365 Business Central

Zetadocs Capture



More ways to capture documents

Documents such as emails, PDFs and images can be dragged and dropped directly onto records in Microsoft Dynamics 365 Business Central* or Microsoft Dynamics NAV. Each document will be securely stored in an electronic archive, linked to its transaction for easy access directly from Microsoft Dynamics.

Field-based staff can add a document to a record whilst on the go, by taking a photo and uploading it in the Business Central app on their phone or tablet.

Paper documents can be scanned in batches and processed by your finance team in the order received. Documents can be 'checked out' whilst being processed – protecting against inadvertent posting or deletion by another team member.

Use barcoded sticky labels to automate the filing of received documents with Zetadocs Capture Plus and reduce the time spent processing each document. The recognition and filing of a barcoded batch of documents can be scheduled to run as a background task.

Enhanced secure storage

Zetadocs uses a central electronic archive to remove the inefficiencies caused by documents being spread across different systems and locations, in both paper and electronic form. That central archive may be on a SharePoint® server, on SharePoint Online (Office 365®) or in network folders* on your file server. All related documents for a Business Central or NAV record can be listed when it's displayed, not just those directly linked to it. For example, contract documents for a customer that are linked to the customer card can also appear on screen when creating a new sales order for that customer.

Documents are stored in the central archive in a configurable folder structure to reflect your work processes. With the Zetadocs Capture Plus edition, that folder structure can be customized according to the specific requirements of your business, such as making those documents available on a customer portal.

Document indexing information, or metadata, is applied automatically and consistently every time you capture documents with Zetadocs. Indexing documents consistently in this way when they are captured makes searching for them later easier, ensuring customer information is available online for search and retrieval across your organization.

At a glance

'Drag & Drop' email and files to store them in an electronic archive linked to Microsoft Dynamics® for easy access

Capture documents via any Business Central or NAV client in the office/on the go

Batch process emails and scanned paper documents

Capture electronic or paper documents without leaving Business Central or NAV

Implement quickly and easily as Zetadocs can be installed as an Extension for Business Central from AppSource

Search and retrieve fast with configurable metadata

Automate the filing of documents, splitting batches using barcodes

Configurable folder structure to reflect your work processes

Customize to meet your individual requirements



Technical Information

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

Powerful search and retrieval

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 can mean few staff have access to them, making answering customer queries harder, and this can lead to dissatisfied customers. Zetadocs helps removes that risk.

With Zetadocs, information is available instantly to anyone who needs it, from a secure and central location. Documents can be retrieved on screen via a FactBox in Business Central or NAV, or from the electronic archive itself – providing secure access for both your finance team and appropriate staff who do not have access to Dynamics to search for and find documents. This latter option can be useful for customer service or project teams that need access to financial documents normally held in the ERP system.

Seamless integration with Microsoft Dynamics that's simple to implement

Zetadocs is designed for Business Central and NAV. This means you don't need to leave Microsoft Dynamics to capture electronic or paper documents. It is simple to drag and drop files and emails onto records in Business Central or NAV, or to use multi-user document queues for the batch processing of scanned paper documents. All documents are securely stored in the electronic archive and visible in the Zetadocs Documents FactBox in Business Central or NAV.

Features

Capturing Business Central and NAV documents with Zetadocs	Zetadocs Express	Capture Essentials	Capture Plus
Drag & drop [†] emails and files, and store electronically* with links to Business Central or NAV	●	●	●
Capture documents using the Web client or mobile app on devices, in the office or on the go	●	●	●
Batch process emails, files and scanned documents using multi-user document queues		●	●
Convert documents to PDF/A for long term archiving compliance and improved searchability		●	●
Configure metadata for better indexing and filtering of documents in SharePoint		●	●
Configurable folders by date/customer/type to organize your electronic archive		●	●
Automate filing of documents, splitting batches using barcode recognition and OCR [‡]			●
Customize to meet your individual requirements using the Zetadocs Capture SDK [‡]			●

* Archiving to network folders is currently only available for Dynamics NAV when deployed on premises.

[†] Drag & drop of emails requires a third party add-on for Microsoft Outlook – see ZTN4477 for more information.

[‡] Requires Zetadocs Capture Plus and customization by an Equisys Solutions Partner using the SDK.