

Intelligent document capture

Instant access to documents in Microsoft Dynamics 365 Business Central

Zetadocs Capture



Automated data entry

Extract data intelligently from vendor invoices or credit notes to enable rapid creation of purchase invoices and credit memos in Microsoft Dynamics 365 Business Central, with key header and line information entered automatically.

The Zetadocs automated data entry feature is ready to go for Business Central and works best with more structured invoices or credit notes. Zetadocs uses Microsoft Azure AI Document Intelligence, that combines powerful OCR capabilities with deep learning models, to analyze and extract key fields and line items from supplier invoices – with no rules or templates to set up for each vendor.

Zetadocs validates the vendor, item and G/L account information captured against Business Central data, then cross-checks the sum amount of the line items captured against the calculated invoice total – with any discrepancies highlighted. A preview of the information captured is shown prior to creating new Business Central records, with any changes made to the vendor, item or GL account mappings remembered – saving more time in the future.

More ways to capture documents

Documents such as emails, PDFs and images can be dragged and dropped directly onto records in Business Central. Each document will be stored securely in Microsoft SharePoint Online, linked to its transaction for easy access from within Business Central.

Paper documents can be scanned in batches and processed easily within Business Central, so that original documents are filed against relevant records. Documents can be 'checked out' whilst being processed – protecting against inadvertent posting or deletion by another team member.

With Zetadocs Capture Plus edition, the recognition and filing of batches of paper documents can be automated, using barcoded sticky labels, to save processing time.

Secure storage using Microsoft 365®

Zetadocs archives documents in SharePoint Online to remove the inefficiencies caused by documents being spread across different locations. Documents can be retrieved via a FactBox in Business Central or from SharePoint directly – giving easy access to both finance teams and other staff who don't use Business Central.

At a glance

Intelligent OCR to extract purchase invoice data using Azure AI Document Intelligence

Automated data entry with no templates or rules to configure and maintain

'Drag & Drop' email and files to store them in SharePoint® Online linked to Microsoft Dynamics® for easy access

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

Batch process emails, e-documents and scanned paper documents

Automate the filing of documents, splitting batches using barcodes

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

Search and retrieve fast with configurable metadata

Customize to meet your individual requirements



Microsoft Azure

Technical Information

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

Powerful search and retrieval

Ensuring that the right people have access to the right documents at the right time helps customer service teams to deliver outstanding service and quickly resolve any disputes that arise. Storing paper documents across multiple locations can mean few staff have access to them, making it hard to answer customer queries. Zetadocs stores all documents in one central archive.

Document metadata is applied automatically and consistently every time you capture documents with Zetadocs. This ensures customer information is always available for search and retrieval across your organization, which is particularly useful for those customer service or project teams that need access to financial documents normally held within Business Central.

Documents are stored 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.

Seamless integration with Business Central & SharePoint Online

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

Features

Capturing Business Central documents with Zetadocs	Zetadocs Express	Capture Essentials	Capture Plus
Drag & drop emails and files, and store in SharePoint Online [†] 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	●	●	●
Intelligent OCR* for extracting document data using Azure AI Document Intelligence with no templates to set up		●	●
AP Automation* for rapid invoice processing in Business Central, with automated data entry and order matching		●	●
Configure metadata for better indexing and filtering of documents in SharePoint		●	●
Configurable folders by date/customer/type to organize your SharePoint archive		●	●
Batch process emails, files and scanned documents using multi-user document queues		●	●
Automate filing of documents, splitting batches using barcode recognition and OCR [†]			●
Customize to meet your individual requirements using the Zetadocs Capture SDK [‡]			●

* Requires the AP automation add-on and is only available when using Business Central v14 or later.

[†] Archiving to network folders is an alternative option when using Dynamics NAV deployed on premise only.

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