

Zetadocs Implementation Services

Predictable outcomes and
satisfied customers



If there is one guarantee in life, it is that nothing stays the same. That is so true for customers' demands that only seem to go in one direction - up. When your core business is implementing better business processes for your customers with Microsoft Dynamics 365 Business Central and Dynamics NAV, you'd rather not have to spend time skilling up on each add-on solution that helps to streamline those exact processes you are helping transform. Typically, that product knowledge is held in few, or more likely one, key resource within each partner, who is probably in high demand.

Customers never like to hear about delays in scheduling their solution implementation. Worse yet, if the work is not implemented correctly the first time around, they are unlikely to understand why the solution is not delivering on the promise they based their purchasing decision on. You and your customer have chosen Zetadocs to deliver time and cost savings benefits, so let's work together to make sure your customers get those benefits as quickly and efficiently as possible.

Predictable outcomes

We have created a set of our most popular Zetadocs solutions that we can implement for you remotely in a fixed number of days. These services are great for over-stretched partners or those who just want to free up time to focus on their core business.

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 of implementation overrunning, excluding factors outside our control, or if any changes are made to the scope during implementation, without having agreed on them in advance. The Zetadocs Statement of Work (SoW) document defines the entire scope of the implementation project, including prerequisites, all activities and the delivery plan to ensure the smoothest possible integration of Zetadocs with the customer's Business Central or NAV system.

Satisfied customers

Customer satisfaction is a partnership. Together, we help ensure your customers are delighted with our products and services. We do this by ensuring that customers 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 your customers' support teams, who manage the ongoing relationship.

Ultimately, they are your customers and they expect you to be involved.

At a glance

Predictable outcomes with no more worries of overrunning implementations, allowing you to focus on your core business

Satisfied customers following our proven implementation methodology

Product specialists executing the implementation, for excellent first-time through results

On-demand resourcing when customer demands outstretch your availability

Less support demands in the future as solutions are implemented correctly to begin with and meet customers' original expectations

Quicker response with direct access to a wider team of experts increases the likelihood of project success

Advisory service when you choose to implement a more custom solution, but seek professional product advice ahead of implementation



Technical Information

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

We advise including a day's services to assist in key contact introductions (including the IT team) and sharing your knowledge on the customer's Business Central or NAV environment so that we are aware of any pertinent customizations. Typically, this time is spent on the first day of the implementation project.

On-demand resourcing

Consultancy time is the scarcest resource partners have, and ensuring those resources are effectively deployed is key to your ongoing success. Scheduling time off your plan to engage and commit the time to learn how to implement new add-ons, no matter how simple, is never popular. Typically, it's considered a distraction.

Easy access to product implementation specialists when customer demands outstretch your availability can really help that scheduling challenge. You can rest assured they have a great deal of experience implementing Zetadocs solutions and have developed an efficient implementation methodology that can better predict outcomes.

Less support and quicker response

Customers tend to need less training and support time when solutions meet their expectations on the first implementation attempt.

However, sometimes even the best plans fail to identify an environment issue or an unforeseen error. In these situations, direct access to a wider team of experts increases the likelihood of project success, especially at peak times.

Technical Advisory Service (TAS)

If you have established that your customers' requirements fall outside the scope of these packaged implementations, then it is important to understand fully how Zetadocs will enhance their business process.

The Zetadocs SDK is a very flexible document management tool kit designed for the "anything's possible" sale. Experts will spend time with you to help specify a solution that meets your customers' requirements, understand how to extend Zetadocs and the time that would take.

Implementation Services

Zetadocs Solutions*	2 Days	3 Days	TAS [†]
Electronic invoicing - send personalized batches directly from Business Central or NAV, saving copies automatically in the electronic archive	●		
Invoice approval - on-screen with access to original supplier documentation and configured approval workflows	●		
Purchase to Pay (P2P) - confirm purchase orders via email and send remittance advice directly from Business Central or NAV	●		
Sales Order Processing (SOP) - capture incoming emails, or scanned documents for central storage and instant access	●		
Expense management - cloud service integrated with Business Central and NAV and configured as an automatic export of expense reports, payment card reconciliation and vehicle reports. More information here	●		
Collections management - send statements and overdue reminders via email with copy invoices automatically attached		●	
Supplier Invoice Processing (SIP) - file vendor invoices electronically using barcode stickers against their appropriate transactions ready for approval		●	
Customizable - one-off document management solutions using the Zetadocs SDK [†]			●

Implementation days are rarely sequential and may span several weeks. The above time frame is a typical estimate and days do not include partner service days.

* Dynamics NAV 2016 and later only, archiving documents to an existing SharePoint online site or a new installation of the Zetadocs Archive with local networked folders.

[†] Depending upon the size and complexity of the solution a full implementation assessment typically takes a day, charged out at or regular service day rate.

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