

# Zetadocs Implementation Services

Predictable outcomes and  
satisfied customers



Purchasing an implementation package will ensure your Zetadocs system is set up correctly by a product specialist so that you can quickly realize the benefits the solution brings to your business.

## 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.

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.

## Satisfied customers

Customer satisfaction is paramount to us. We will work with you at each step of the project to help ensure you are delighted with our products and services. We do this by clearly explaining to you the scope of work ahead, managing your expectations during implementation and then securing your formal acceptance of the solution at the end.

Only then will our product specialists formally handover to our customer support team, who will manage our ongoing relationship with you.

## Ongoing support

Solutions that are implemented correctly the 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. Having experts on hand who can quickly troubleshoot any problems that may arise will save you precious time and help avoid delays seeking answers to any complex problems.

Support is provided via email 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** 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

**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/zdtechinfo](http://www.equisys.com/zdtechinfo)

## 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.

For Zetadocs services relating to existing systems (e.g. upgrades, file migrations and report mark-up), a product specialist will always scope the requirements and agree a plan with you that includes timings.

## Implementation Services

The following implementation services include the installation and configuration of Zetadocs, with archiving to SharePoint Online.

Solutions	2 Days	3 Days	TAS <sup>†</sup>	Zetadocs product
<b>Electronic invoicing</b> - send personalized batches directly from Business Central, saving copies automatically in the SharePoint Online archive	●			Delivery Essentials
<b>Remittance advice</b> - send personalized & consolidated batches automatically when payments are posted in Business Central	●			Delivery Essentials
<b>Sales Order Processing (SOP)</b> - capture incoming emails, or scanned documents for central storage and instant access	●			Delivery Essentials & Capture Essentials
<b>AP Automation*</b> - streamline invoice processing with document OCR, automated ordermatching and archiving of original supplier documents	●			Capture Essentials or Capture Plus
<b>Enhanced capture</b> - archive documents against Business Central journal transactions for easy retrieval via the ledger after posting, and additional non sales and purchase page types (up to 5), such as Item or Job pages		●		Capture Essentials
<b>Collections management</b> - send statements and overdue reminders via email with copy invoices automatically attached		●		Delivery Plus
<b>Automated filing</b> - secure archiving of documents, linked to the relevant Business Central transaction (using filename or barcode value)		●		Capture Plus
<b>Customizable</b> - one-off document management solutions using the Zetadocs SDK <sup>†</sup>			●	Delivery Plus or Capture Plus
<b>Upgrades</b> - to the latest Zetadocs version, including a migration to a Business Central cloud environment where required			●	Any
<b>File migration</b> - move documents stored in the NAV / Business Central database, or in the Zetadocs Archive stored on premise, to SharePoint Online, retaining direct access to files via Business Central			●	Any
<b>Report markup</b> - modify NAV report(s) to enable use with Zetadocs Delivery			●	Delivery Essentials or Delivery Plus

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 Business Central v14 and later only, archiving documents to SharePoint Online.

† 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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