Sales order processing

Improve response times with all sales documents on screen

Zetadocs

Store POs and sales documents in Business Central or NAV

Efficient processing and management of sales orders is vital to your customer relations and business growth. Sales orders can arrive via fax, post or email, and processing them can be a manual and time-consuming process. If you process your orders quickly and correctly every time, you will not only generate revenue more quickly, you will also promote better customer satisfaction, which leads to repeat business.

Capture and file customer documents accurately

Customers' purchase orders arrive in the finance team via a number of methods. The management of the paper documents and emails that flow through your sales processes can be extremely time consuming. The cost of filing, indexing, retaining and retrieving documents within an organization can add significant overhead, especially if all of the documents that relate to a specific transaction or customer are stored in different locations and different formats.

Zetadocs is designed for Microsoft Dynamics 365 Business Central or Microsoft Dynamics NAV. It allows emails, electronic faxes or scanned orders to be centrally processed using multi-user document queues, improving order visibility and accurate filing. For lower volumes, simply drag and drop documents received against the Business Central or NAV record. This automatically archives the information and creates links to enable swift retrieval from within Business Central, NAV or the electronic archive directly.

Reduce document delivery and filing costs

Delivering paper documents is time-consuming and costly. The direct costs of paper, consumables and postage, plus the time it takes to print, collate, package, post and then file documents, add significant costs to the process. Paper documents can take days to reach the customer which adds further delays.

Zetadocs delivers your order confirmations and invoices electronically, directly from Business Central or NAV in personalized, consolidated batches based on the recipients' requirements and preferences, and can include your business terms too. This ensures that all information relating to the transaction is instantly available on screen, providing your customer with a complete picture.

At a glance

Reduce costs related to filing, indexing, storing and retrieval of order-to-cash documents, by capturing incoming email orders and scanned paper documents electronically

Increased efficiency of the sales order process and time spent sending confirmations, filing documents and retrieving evidence can now be spent on other finance tasks

Improve customer service by moving customer interaction on screen and responding more quickly to enquiries with all related documents instantly available within Microsoft Dynamics® 365 Business Central or NAV and the electronic archive

Seamless integration with Business Central or NAV means you don't need to leave the application to send documents or view and capture incoming documents

Reduce your carbon footprint by eliminating paper from your sales order process to help meet organization sustainability targets

Get it from
Microsoft
AppSource

Technical Information

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

Achieve real customer service improvements

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, with few staff having access to them, makes answering customer queries harder, and this can lead to dissatisfied customers.

With Zetadocs, all documents are captured and electronically filed alongside their related Business Central or NAV transaction. This helps you keep your customer accounts up to date and allows you to stay on top of payments and credit control. Order-to-cash information is consistently available instantly to anyone who needs it, from a secure and central location. This moves customer interaction on screen where you have everything on-hand, allowing you to quickly resolve any queries and avoid delays or disputes.

Seamless integration with Dynamics

Zetadocs is built for Dynamics, so that you don't need to leave the application to capture order-to-cash documents, deliver order confirmations and other sales documents, or view the archived copies in the Zetadocs Documents FactBox.

Zetadocs can also be customized to meet your individual requirements, so that captured and delivered documents are filed automatically to a custom folder structure in the electronic archive, or set additional business specific information to aid retrieval from SharePoint.

Features

Capturing and delivering documents with Zetadocs	Zetadocs Express	Capture Essentials	Capture Plus	Sales order processing
Drag & Drop emails and files, stored electronically with links to Business Central or NAV	●	●	●	●
Capture paper documents with locally attached scanners directly into Business Central or NAV		●	●	●
Capture documents using Business Central web client or mobile app on devices, in the office or on the go*		●	●	●
Batch processing of emails, files and scanned documents using multi-user document queues		●	●	●
PDF/A conversion of documents for long term archiving compliance and improved searchability		●	●	●
Configurable metadata for better indexing and filtering of documents in SharePoint		●	●	●
Configurable folders by (date/customer/type) to organize your electronic archive			●	●
Automated filing of documents, splitting batches using barcode recognition and OCR†			●	●
Customizable to meet your individual requirements using the Zetadocs Capture SDK†			●	●
Deliver documents in batches by email or hard copy to match customer preferences‡				●

* All Business Central and NAV clients are supported, including the web client, the apps for phones and tablets, the Windows client installed directly or via ClickOnce, and the classic client
† requires the additional purchase of Zetadocs Capture Plus and customization by Equisys Solutions Partners using the SDK
‡ Batch delivery of Dynamics reports require the additional purchase of Zetadocs Delivery Essentials. Delivery Essentials can be upgraded to Zetadocs Delivery Plus to schedule delivery of Dynamics reports, sent in the background automatically. Zetadocs Delivery Plus requires customization by Equisys Solutions Partners using the SDK.

Zetadocs