Zetadocs Expenses Implementation Services

Predictable outcomes with professional support

Zetadocs Expenses

Purchasing an implementation package will ensure your Zetadocs Expenses system is set up correctly and its integration with Microsoft Dynamics 365 Business Central is carried out and supported by professionals.

Predictable outcomes

We have created these packaged services to get Zetadocs Expenses installed, configured and tested in your Business Central production environment so that you are up and running sooner than if you undertook the implementation yourself.

Our packaged implementations follow our proven methodology that includes piloting the solution with a limited number of users initially, giving you time to get comfortable with your new system prior to a full go live. Thanks to the fixed scope of work in these packages, we can better predict the outcome. Provided there are no factors outside our control, we will remove your risk of having to pay for any implementation overruns.

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 implemented correctly 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 packaged services so that there are no worries about cost overruns from implementations running long

Satisfied customers as projects are undertaken by product specialists who follow a proven implementation methodology

Professional support plan is included so that you have access to Equisys' team of technical support experts

Quicker response in troubleshooting as our support team will save you precious time fixing any technical problems

Defined Statement of Work (SoW) ensures the smoothest possible integration

ANDROID APP ON Google play

Available on the App Store

Get it from Microsoft AppSource

Technical Information

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

Statement of Work

The Zetadocs Expenses Statement of Work (SoW) defines the entire scope of the implementation project to ensure the smoothest possible integration of Zetadocs Expenses with your Business Central system.

Implementing Zetadocs Expenses		Express (1 day)	Essentials (2 days)	Plus (3 days)
Plan	**Requirements gathering** meeting with stakeholders	via email	● ~1 hour	● ~2 hours
	Implementation planning meeting to agree project timescales and roles & responsibilities	● ~1 hour	● ~1 hour	● ~1 hour
Install and configure	**Extension for Business Central** installed in the production environment	●	●	●
	User accounts enabled for the pilot phase† (typically Microsoft Work or School accounts)	● 4 users	● Up to 15	● Up to 15
	Expense types created with associated GL accounts for users to select when submitting an expense	● 12 types	● Up to 25	● Up to 25
	Sales tax rates created to match those in Business Central for users to select when submitting expenses	● 2 rates	●	●
	Vehicles types and mileage rates configured for users to select when submitting business mileage expenses	● 1 type	● Up to 10	● Up to 10
	Custom properties configured such as dimensions, jobs or tasks for users to select when submitting expenses‡		● Up to 5	● Up to 5
	Payment cards added as payment methods for corporate credit cardholders to select when submitting expenses		● 1 per user	● 1 per user
Customize	**Business Central export** customized for a specific business requirement with new custom code§			●
Test	**Full testing** of the configured solution from submission to approval and export of expenses into Business Central	●	●	●
Train	**Online help** resources including videos that are available for user training	●	●	●
	Administrator training on how to manage the Zetadocs Expenses System Settings	●	●	●
	End user training session led by a Zetadocs specialist covering the core functionality		● 1-2 hours	● 1-2 hours
Go live	**Go live plan** agreed to onboard all users	●	●	●

* All meetings, installation steps and training services are conducted remotely; timings are agreed during the planning phase with work not necessarily taking place on a single or consecutive days
† User accounts will be configured to enable use of the solution in a production environment during a pilot phase; administrator training includes how to set up and enable further user accounts
‡ The configuration of custom properties is outside the scope of the Express edition package but they can be configured by the administrator following the guidance given in the online help

Zetadocs