# Zetadocs Capture
## Instant access to documents in Microsoft Dynamics NAV

## More ways to capture documents

Zetadocs integrates with Microsoft Dynamics® NAV so that documents such as emails, PDFs and images can be dragged and dropped directly onto records in NAV, for secure storage alongside relevant NAV transactions in an electronic archive. Field-based staff can add documents to a NAV record whilst on the go, by snapping and uploading photos with the Dynamics NAV app on their phones and tablets.

Paper documents can be scanned in batches and processed by your finance team in the order received. Documents can be 'checked out' whilst being processed – protecting against inadvertent posting or deletion by another team member.

The use of barcoded sticky labels to automate the filing of received documents with Zetadocs Capture Plus reduces the time spent processing each document. On the latest versions of NAV, the recognition and filing of a barcoded batch of documents can be scheduled to run as a background task.

## Enhanced secure storage

Zetadocs uses a central electronic archive to remove the inefficiencies caused by documents being spread across different systems and locations, in both paper and electronic form. That central archive may be on a SharePoint® server, on SharePoint Online (Office 365®) or in network folders on your file server. All related documents for a NAV record can be listed when it's displayed, not just those directly linked to it. For example, contract documents for a customer that are linked to the customer card can also appear on screen when creating a new sales order for that customer.

Documents are stored in the central archive 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.

Document indexing information, or metadata, is applied automatically and consistently every time you capture documents with Zetadocs. Indexing documents consistently in this way when they are captured makes searching for them later easier, ensuring customer information is available online for search and retrieval across your organization.

## At a glance

**'Drag & Drop' emails and files**, stored electronically with links to NAV

**Capture documents with all NAV clients** in the office or on the go

**Batch process** emails and scanned paper documents

**Capture electronic or paper documents** without leaving Dynamics NAV

**Implement quickly and easily** as Zetadocs is installed on the NAV server and no client software is required

**Search and retrieve fast** with configurable metadata

**Automate the filing of documents**, splitting batches using barcodes

**Customize** to meet individual requirements



Certified for
Microsoft
Dynamics
NAV

## Technical Information
For details of supported platforms and other system requirements, please visit:
www.equisys.com/zdnavtechinfo

## Powerful search and retrieval

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. Zetadocs helps removes that risk.

With Zetadocs, information is available instantly to anyone who needs it, from a secure and central location. Documents can be retrieved on screen via a FactBox in NAV or from the electronic archive itself – providing secure access for both your finance team and appropriate staff who do not have access to NAV to search for and find documents. This latter option can be useful for customer service or project teams that need access to financial documents normally held in the ERP system.

## Seamless integration with Microsoft Dynamics NAV that's simple to implement

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

Zetadocs is installed and configured on the Dynamics NAV server – no client software is required. Zetadocs supports all NAV clients, so no matter if you are using the NAV Windows client that's installed on your desktop, streamed to your PC via ClickOnce, the NAV Web client or even the Dynamics NAV app on devices, you can use Zetadocs to capture all original documents so that you have on screen visibility of them alongside their related NAV records.

## Features

| Capturing documents with Zetadocs | Zetadocs Express | Capture Essentials | Capture Plus |
|---|:---:|:---:|:---:|
| Drag & drop emails and files, and store electronically with links to NAV | ● | ● | ● |
| Capture on the go or in the office with the NAV Web client or Dynamics NAV app on devices * | | ● | ● |
| Batch process emails, files and scanned documents using multi-user document queues | | ● | ● |
| Convert documents to PDF/A for long term archiving compliance and improved searchability | | ● | ● |
| Configure metadata for better indexing and filtering of documents in SharePoint | | ● | ● |
| Configurable folders by (date/customer/type) to organize your electronic archive | | ● | ● |
| Automate filing of documents, splitting batches using barcode recognition and OCR ** | | | ● |
| Customize to meet your individual requirements using the Zetadocs Capture SDK ** | | | ● |

*Dynamics NAV 2015 and later with separately purchased subscription to Office 365 for your electronic archive*

** requires the additional purchase of Zetadocs Capture Plus and customization by Equisys Solutions Partners using the SDK*