

Feature Sets of Zetadocs Editions

Zetadocs Express (Supports NAV 2009 R2 RTC and NAV 2013) ([website](#))

Zetadocs Express for Microsoft Dynamics NAV is a [downloadable](#) document management module for NAV, available at no additional cost to users of the Role Tailored client who are on a Business Ready Enhancement Plan. It is the result of collaboration between Microsoft and Equisys to provide Microsoft Dynamics NAV 2013 & NAV 2009 R2 RTC customers the additional value of integrated document management using SharePoint.

- **Drag & Drop:** Any file, email or attachment can be dragged and dropped onto a record in the NAV Windows client to store it in SharePoint, linked to the record and listed in the Documents FactBox
- **Save & Send:** Click the "Save and Send" button to email almost any customized NAV report using SQL Server Reporting Services, archiving a copy automatically in SharePoint for future retrieval on-screen
- **Workflow:** Initiate and monitor SharePoint document approval workflows. Simple SharePoint workflows can be started for any document listed in the FactBox, such as an invoice, and the approval status monitored in NAV
- **On-premise or in the Cloud:** Use your existing on-premise SharePoint 2010 & 2013 or choose Office 365's SharePoint Online for cloud-based document archiving and retrieval at any time, from anywhere

Advanced Versions ([website](#))

Zetadocs for NAV (Supports NAV 4.0 database with 5.0 Client and newer systems) is available in a range of editions and configurations to fit different requirements.

Zetadocs Capture Essentials edition offers electronic filing of inbound documents, emails and faxes for fast, efficient retrieval in Microsoft Dynamics NAV or SharePoint. **Capture Plus** adds features to automate and customize this process utilizing barcodes for example. Both Zetadocs Capture Plus and Capture Essentials require either SharePoint 2010 & 2013 on premise or SharePoint Online

Zetadocs Delivery Essentials edition enables batch electronic delivery, archive and retrieval of documents and reports from Microsoft Dynamics NAV. **Delivery Plus** adds the power to customize the document production and delivery process. The system can be configured to send documents by email and/or Hard copy and has the option to include fax. Zetadocs Delivery systems only require SharePoint for customer looking to archive copies of sent documents.

Payables Approval Managing invoice approval via internal mail or email results in slower, costlier approvals with little visibility or control over the process. In addition, delayed or misplaced invoices can result in early payment discounts being missed or overdue payment charges incurred. Zetadocs Payables Approval puts the whole approval process on screen and under your control. Buyers and budget holders are able to view and approve purchase invoices whether they are in the office or away from it

Website resources

[Benefits of using Zetadocs](#)

[Sample solution videos](#)

[Sales documentation](#)

[Detailed technical specifications for all Zetadocs versions](#)

[Feature summary by version](#)

Capture Features	Benefits	Zetadocs Express	Capture Essentials	Capture Plus
Drag & Drop feature allows emails and files to be stored in SharePoint with links to NAV	On screen access to documents improves customer service and reduces the need for paper files	■	■	●
Document approval workflows to sign-off documents on screen using SharePoint	Saves time, provides greater convenience and helps prevent documents getting mislaid	■	■	●
Batch processing of emails, files and scanned documents using multi-user document queues	Efficiency improvements, saving time and improving customer service		■	●
PDF/A conversion of documents to ISO standard archive format with additional custom metadata	Assured long term access to an eco-friendly electronic archive with an optimal fit to the business			●
Automated filing of documents, splitting batches using barcode recognition and OCR	Maximizes time savings and customer service benefits while reducing dependence on paper			●
Delivery Features	Benefits	Zetadocs Express	Delivery Essentials	Delivery Plus
Save & Send by email NAV sales and purchasing documents, filing copies in SharePoint	Reduces use of conventional mail, resulting in cost savings and a smaller carbon footprint	●	●	●
Batch sending by email and fax* according to customers' and vendors' preferences	Efficiency improvements, saving time and improving customer service		●	●
Overlay & Attach logos, letterheads, terms & conditions and personalized covering emails to NAV documents	Enforces compliance with corporate brand guidelines and regulatory requirements		●	●
Programmable control of attachments such as timesheets and brochures, based on context	Further efficiency improvements, saving time by automating document production processes			●
Fully customizable sending based on business logic requirements, with tagging using custom metadata	Maximizes time savings and customer service benefits with an optimal fit to the business			●