

Zetadocs Express for Microsoft Dynamics NAV

Reduce costs and work more efficiently with this easy-to-download document management add-on that integrates Microsoft Dynamics® NAV with Microsoft Office 365. Now you can store original documents associated with Microsoft Dynamics NAV records, such as emails, faxes and scanned documents, securely in one central location for quick and easy retrieval using Microsoft SharePoint Online – a component of Microsoft Office 365.

KEY BENEFITS:

Cut costs with easy document storage, retrieval and delivery

Reduce the operating costs of filing, indexing, storing and retrieving important documents. Zetadocs Express for Microsoft Dynamics NAV makes it possible to securely store and retrieve important Microsoft Dynamics NAV-related documents and PDF files in one central location, with links to the record in Microsoft Dynamics NAV created automatically.

Work more efficiently

Capture electronic documents quickly by dragging and dropping the documents inside Microsoft Dynamics NAV. Retrieve and view documents from within the Microsoft Dynamics NAV RoleTailored Client or from Microsoft SharePoint Online. Zetadocs Express for Microsoft Dynamics NAV also helps to improve the efficiency of sales, purchasing and other document approval processes with standard document approval using Microsoft SharePoint Online.

Get more from your Microsoft technology investments

Zetadocs Express for Microsoft Dynamics NAV enables employees, who do not use Microsoft Dynamics NAV but need access to original documents and key business information on-screen, to view and access Microsoft Dynamics NAV documents and records quickly.

Save your business time and money with easy document management

Zetadocs Express for Microsoft Dynamics NAV can help your business save time and money through improved document management by integrating Microsoft Dynamics NAV with Microsoft SharePoint Online, a component of Microsoft Office 365. An easy-to-download document management add-on from Equisys plc, Zetadocs Express for Microsoft Dynamics NAV helps companies reduce costs and enhance business processes by allowing electronic delivery of documents, and offering quick and easy storage online in Microsoft Office 365 directly from Microsoft Dynamics NAV, via a drag and drop feature.



ZETADOCS EXPRESS FOR MICROSOFT DYNAMICS NAV

Now it's easier to deliver, store, share and approve documents

Zetadocs Express for Microsoft Dynamics NAV helps remove manual tasks associated with document delivery by providing simple automated emailing for reports such as invoices, using the email address in the customer card. Incoming emails, faxes and scanned documents can be quickly and easily stored online in Microsoft Office 365 via a drag and drop interface, with links to the record in Microsoft Dynamics NAV automatically created. Not only are all your documents securely stored online, it's possible to retrieve them quickly on-screen through Microsoft Dynamics NAV or Microsoft SharePoint Online. Documents stored electronically in SharePoint can be routed electronically using a simple

document approval workflow in SharePoint, speeding up the process of approval and ensuring documents are not lost or misfiled¹. Zetadocs Express for Microsoft Dynamics NAV also allows the approval status to be seen within the Document FactBox in Microsoft Dynamics NAV, allowing authorized users to monitor the progress of the approval, or make adjustments where necessary. The originator is notified of the workflow completion via email, allowing any subsequent operations, such as the payment of a supplier, to be completed manually.

Zetadocs Express for Microsoft Dynamics NAV is available now as part of Microsoft Dynamics NAV 2009². Save your business time and money. Contact your Microsoft Dynamics partner today.

Feature	Benefit
Document Drag and Drop enables users to capture incoming emails, faxes and other documents by dragging and dropping the file, document or message in the Links FactBox. This action automatically uploads the document to Microsoft SharePoint Online and links it to the record in Microsoft Dynamics NAV.	Increases efficiency by enabling easy storage and retrieval of documents.
Choice of Client means users can store, view and access documents from the Microsoft Dynamics NAV RoleTailored Client or from Microsoft SharePoint Online.	Increases efficiency by giving the user greater flexibility in how to access and view the stored documents.
Basic Document Approval using Microsoft SharePoint Online allows the approval status of documents to be seen within the Document FactBox in Microsoft Dynamics NAV. Approving managers are prompted by email, as with any Microsoft SharePoint workflow.	Improves business processes by speeding up the approval process of important documents, and ensuring documents are not lost or misfiled.
Save & Send as PDF enables users to email a report as a PDF attachment, filing a copy of the report automatically in Microsoft SharePoint Online. Supports simple automated email addressing for sales reports such as invoices, using the email address stored in the customer card (if present).	Increases efficiency and collaboration by making it easier to share documents and information across the company.

Requirements

Microsoft Dynamics NAV 2009 with active Business Ready Enhancement Plan
Subscription to Microsoft Office 365

¹ Workflow is not supported for the Small Business subscription of Microsoft Office 365.

² ZetaDocs Express for Microsoft Dynamics NAV is available as new functionality for Microsoft Dynamics NAV customers provided they are on an active Business Ready Enhancement Plan.

About Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success. U.S. and Canada Toll Free 1-888-477-7989. Worldwide +1-701-281-6500. www.microsoft.com/dynamics.

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