



Document management and expense management for Business Central and NAV

Zetadocs is a suite of leading document management and expense management solutions, designed specifically for Dynamics 365 Business Central and NAV.

Zetadocs helps you streamline business processes, freeing you from paper and improving the way your business operates.

Finance departments, customer services, sales and operational teams can work more efficiently on screen, saving time and costs, while offering better service levels to customers, suppliers and staff.



Document Management

ZetadocsDelivery

The Delivery editions of Zetadocs email batches of documents in PDF format from within Business Central or NAV using your contacts' email addresses, helping your finance team produce and send documents such as customer invoices and statements.

Express

- Foundation document management software, available at no licence charge for up to four users
- Save and send reports by email

Essentials

- Send batches of documents, such as invoices and statements, in PDF format
- Personalize content based on document type or whom the user is sending the documents to
- Keep track of sent batches using activity log

Plus

- Automatically attach overdue invoices to statements when sending
- Batch delivery can be automated to run in the background
- Customizable to suit your customers' business needs

ZetadocsCapture

The Capture editions of Zetadocs store emails and scanned documents alongside Business Central or NAV transactions for instant access from within Business Central or NAV, or directly from an electronic archive. This speeds up handling customer queries and cuts time spent on traditional paper filing.

Express

- Foundation document management software, available at no licence charge for up to four users
- Drag and drop documents and emails into Business Central and NAV records

Essentials

- Locate and retrieve archived documents quickly and easily, as they are stored in SharePoint using a three-tiered folder structure, indexed using metadata
- Access files on the go with the Business Central and NAV Phone or Tablet client

Plus

- Customizable SharePoint folder structure with automated filing of documents
- Automated storage of paper documents using barcode recognition and search using OCR

ZetadocsApprovals

Zetadocs Approvals is a cloud service which offers simple approval of purchase invoices on screen for companies that use Business Central on premises and NAV.

- Faster sign off, better relationships with suppliers and smooth operation of your customers' supply chain
- Simple approval of purchase invoices and orders on screen, even by non-Business Central and NAV users

Expense Management

Zetadocs

Expenses

Zetadocs Expenses is an end to end solution that solves your organization's headache of managing travel and entertainment expenses, from capture through to reimbursement. Our seamless integration with Business Central and NAV saves you money and sets us apart from our competitors.

As a cloud-based solution, our software is updated monthly, users are automatically upgraded to the latest version and we offer a flexible pricing model and outstanding support.

Express

- Foundation expense management software, available at no software cost for up to 25 users
- Submit and approve expenses on the go with the Zetadocs Expenses app or license browser
- Export expense reports seamlessly to Business Central, with no rekeying required

Essentials

- Control spending with policy enforcement and setting business rules
- Reconcile company credit cards and manage company cars
- Reporting insights help you control spend and improve budgeting

Plus

- Greater customization
- Apply additional business logic that records each approved expense in your accounts database in whatever way you need

Benefits



Happier workforce



Time savings



Simple process



Complete visibility



Control over expenditure

Testimonials

"This saves the organisation hours each week and staff have been very positive about the new claim process, especially about the simplicity."
- National Citizen Service

Discover more



Finance processes Zetadocs helps with:

- Proof of delivery tracking
- Expense management
- Collections management
- Sales order processing
- Supplier invoice processing
- Electronic invoicing
- Invoice approval

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