

Zetadocs for Microsoft Dynamics GP

Integrate Zetadocs with Microsoft Dynamics GP to enable users to manage the production, delivery and storage of financial documents.



“The addition of an add-on application like Zetadocs for GP provides more reasons to use GP as your ERP solution. I would suggest that Zetadocs is something that all GP customers could consider adding to their GP software.”

Steve Farr, Product Marketing Manager, Microsoft UK

Zetadocs for Microsoft Dynamics® GP helps accounts departments improve efficiency, enhance customer service and reduce the costs associated with producing and handling paper documents. Zetadocs for GP automates the delivery of invoices, statements and other financial documents, and integrates with SharePoint® to provide secure document storage and fast retrieval.

Automate document delivery

Producing, packaging and posting financial documents is a time consuming and costly process. Zetadocs for GP enables delivery of accounting documents by email or fax, in batches, with just a few mouse clicks. This eliminates the cost of printing and postage and reduces the time accounts staff spend on administrative tasks.

Choose delivery methods for each contact

Simple rules can be set up to deliver business documents appropriately by email and fax, as well as being printed, so you can give your customers the choice of how they receive information. For example, a user can define a rule for a specific contact to receive all invoices by email and all order statements by fax. Once the rule has been defined, that procedure is automatically followed for that contact for those document types, unless the user chooses to manually override it for an individual document.

Share and retrieve documents easily

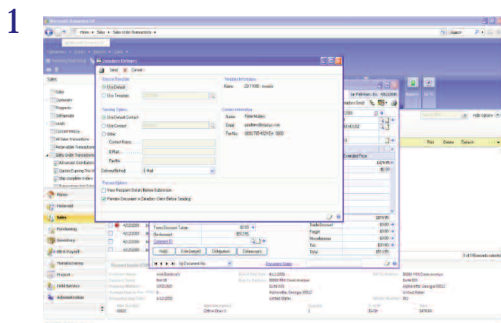
Zetadocs automatically stores copies of all documents that have been sent, enabling quick retrieval. It links together documents in a transaction so that users can quickly track each stage of the sales or purchase process. Searching is simple and can be based on any information contained in the document, even if this was not originally entered into GP.

Information can also be accessed outside of the finance team as Zetadocs enables Sales teams and other departments to access on-screen the key supporting documents for each sale or process without the expense of a full GP Client licence or the need to involve the finance team.

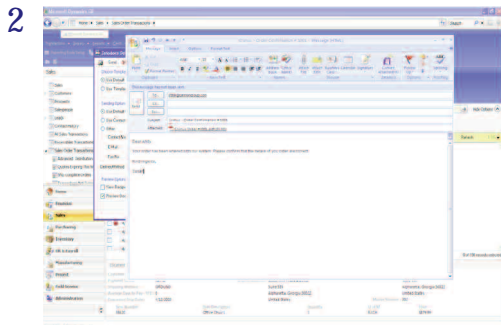
The advantages of Zetadocs for Microsoft Dynamics GP

- Eliminate the cost of paper fulfilment and storage – create electronic invoices, statements and remittances from GP and store copies automatically
- Meet individual customer delivery requirements – send personalized documents by email, fax or as paper copies
- Enable fast document retrieval by authorized network users – provide non-finance personnel access to key financial documents

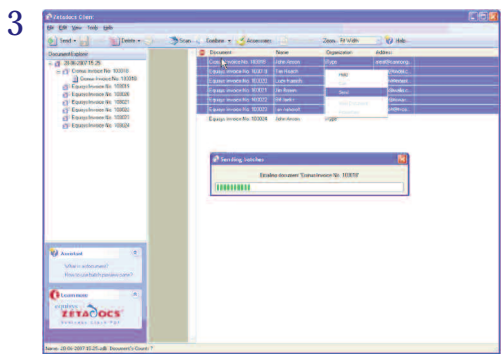
Sales order processing with Zetadocs for Microsoft Dynamics GP



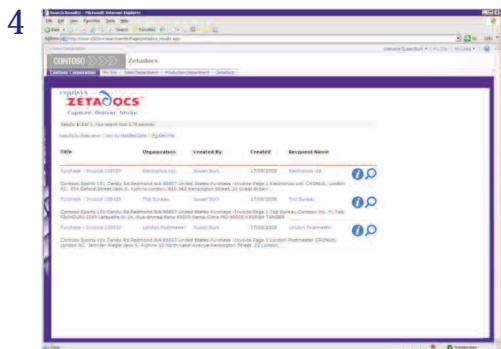
Capture and view sales orders in GP and create new orders



Send a personalized order confirmation as a PDF by email



Post the invoices and then deliver a batch of customer invoices from Zetadocs for GP



Sent documents are available for any authorized network user to view within SharePoint

Technical Specifications

Windows Vista™ Business, Enterprise or Ultimate Edition (x86 or running 32 bit on x64),
Windows® XP SP2 (x86 or running 32 bit on x64),
Windows Server® 2003 SP1 or later (x86 or running 32 bit on x64),
Windows Server 2008.

Requires Microsoft.NET Framework version 2.0.

Integrates with Microsoft Office Outlook® 2003 SP2 and 2007.

Integrates with Lotus® Notes® V6.5 and above.

Integrates with SMTP email systems. Active Directory® integration for rapid and easy deployment to all network users.

Creates PDF files which are readable using Adobe® Reader® software version 5 and later.

Supports PDF attachments created in PDF 1.2, 1.3, 1.4 and 1.5 standards.

Specifies PDF security options such as allow printing, content extraction and password protection.

Password protection using 40-bit and 128-bit encryption.

Integrates with GP 10.0 (including SP1, SP2 & SP3), (x86 or running 32 bit on x64)

Supports Microsoft Office SharePoint Server (MOSS) 2007 and Windows SharePoint Services (WSS) v3.0 (x86 or running 32 bit on x64)

Client Hardware requirements

It is recommended that systems have Pentium® class CPUs of 1 GHz or higher with 512 MB RAM or more.

Equisys plc Equisys House, 32 Southwark Bridge Road, London SE1 9EU, UK
T +44 (0)20 7203 4000 F +44 (0)20 7203 4005 E sales@equisys.com

Equisys Inc 30000 Mill Creek Avenue, Suite 335, Alpharetta, GA 30022, USA
T +1 (770) 772 7201 F +1 (770) 442 5789 E sales@usa.equisys.com

© Equisys plc 2009 All trademarks acknowledged
All information accurate at time of publication



equisys

DocumentDynamics