DocLink
Taking Everything Digital

Why Your Business NEEDS Advance Document Management with your Dynamics ERP

DAN DRVARIC
SALES DIRECTOR, CENTRAL

Innovia CONSULTING

ALTEC

TODAY'S DISCUSSION

So How Does DocLink Work?

DocLink | Connecting People, Processes & Data

Process

Workflow | Automated Routing | Smart Forms

Dynamics

Capture | 2-way sync | View docs

Capture or Create

Scan | OCR | Print | Capture | Automated Import | Barcode | Email | Smart Forms | Mobile | Web

Retrieve

Web Client | Smart Client | Mobile App

Deliver

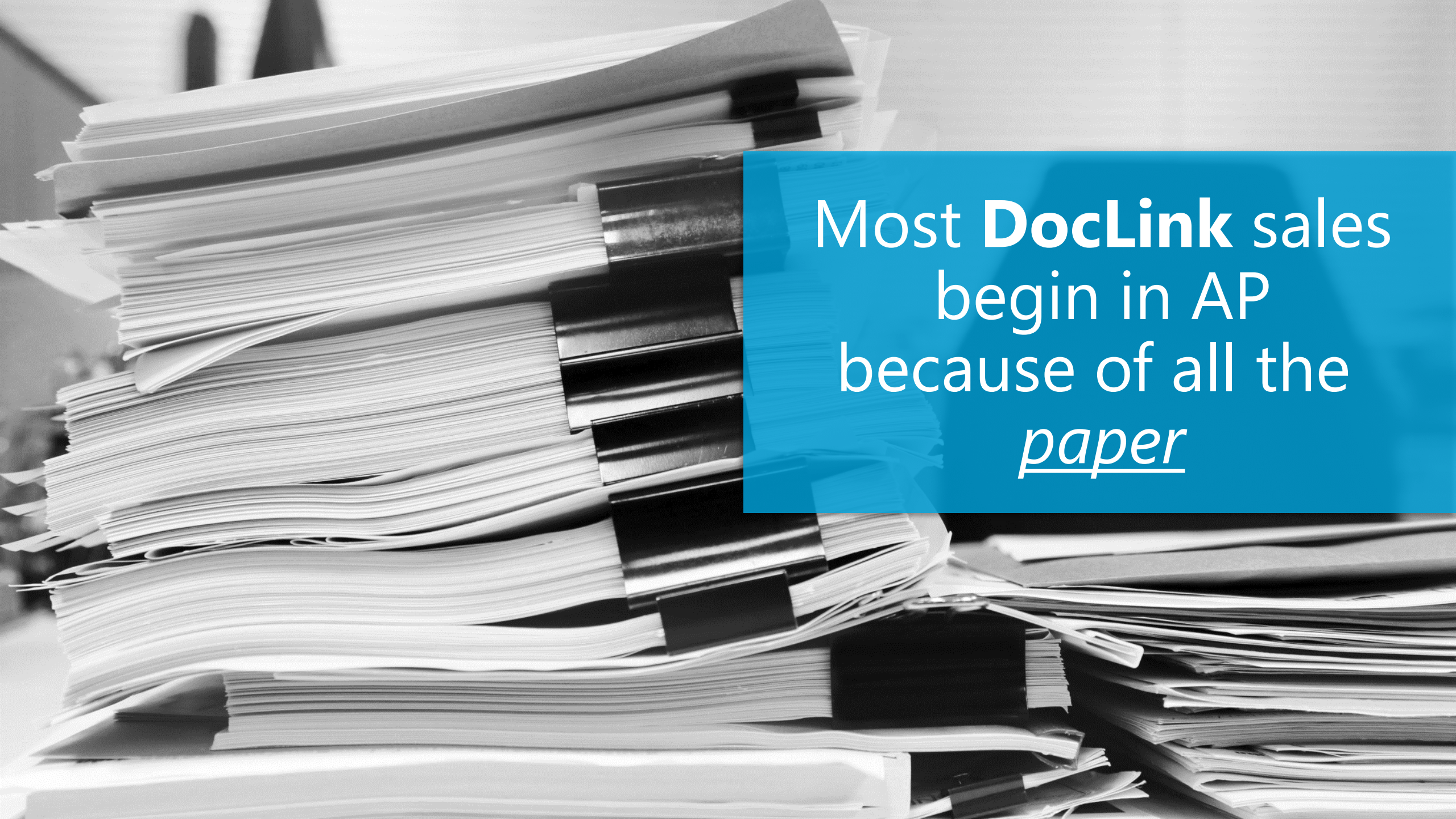Email | Print | Fax | FTP | File Copy
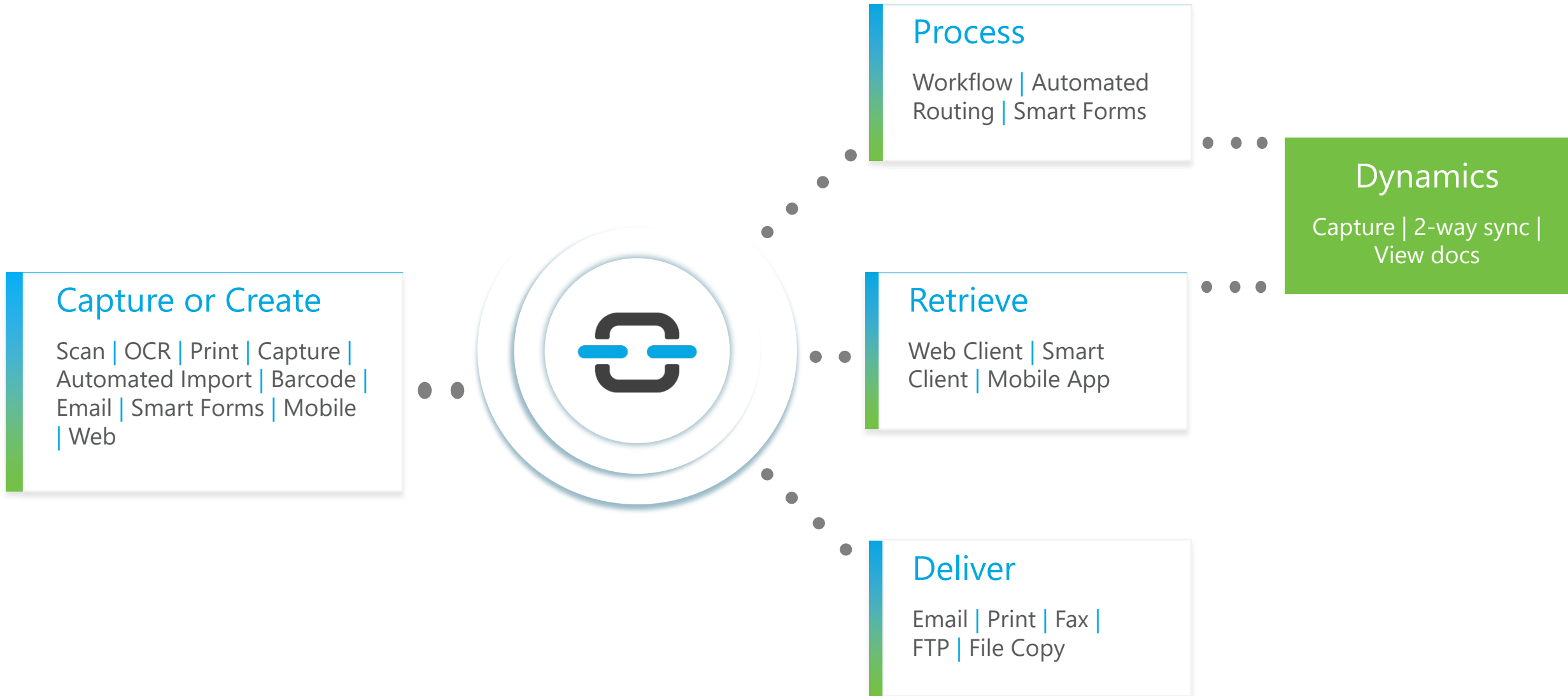
INTEGRATIONS

Seamless integrations make for a robust experience between DocLink & ERP

Uninterrupted, deep integration between DocLink and ERP allows data flow side-by-side

Dynamics GP

Dynamics NAV

Dynamics SL

Dynamics AX

Dynamics 365 BC

innovia
CONSULTING
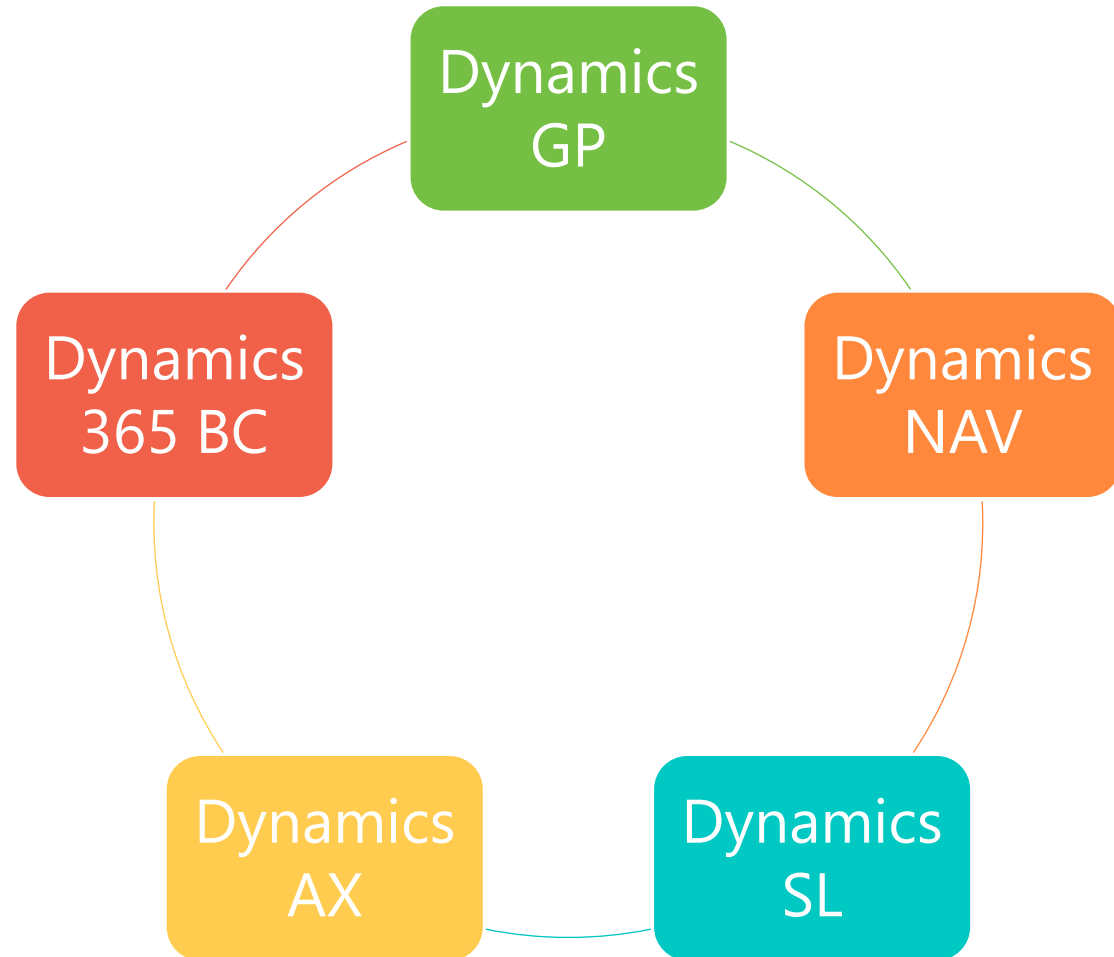
DocLink

Accounts Payable

Most **DocLink** sales begin in AP because of all the *paper*

WHY GO PAPERLESS & AUTOMATE AP?

Accessibility to Documents

Streamline Manual Processes

Minimize Data Entry

Automated Delivery of Documents

Leverage OOB Integration

Simplify Audits

Any Document, Any Process, Anywhere...

THE BENEFITS

Eliminates 100% of paper invoices
Reduces approval times from weeks to days/hours
Minimize or eliminate data entry to drive time/cost savings

COST SAVINGS

Offsite Storage

Square Footage

Paper/Copier

Personnel

Courier/Overnight

TIME SAVINGS

Searching

Filing

Copying

Data Entry

Approvals

Remote Access

STRATEGIC INITIATIVES

Growth without adding staff

Early pay discounts

Avoid late fees

Easier audit

Compliancy

Disaster preparedness

ACCOUNTS PAYABLE

— ..

AP is one of the most common information flow problems for all companies. DocLink extends Dynamic ERP's capabilities for greater time and cost savings.

Invoice Onboarding

- AI-driven OCR
- Duplicate checking, approvals and data validation before sending to Acumatica

Workflow

- Easy to configure and adjust process flows
- Workflow delegation
- Approvals via email, mobile app and desktop clients

Three-way Matching

- Automated matching
- Exception handling

CASE STUDY

Industrial Portable Evaporative Cooling & AC Systems

They realized their need to seamlessly store, link and access documents beyond accounting and their ERP: HR, Sales Order Processing, engineering, contract management, and quality assurance.

Business Challenges

Too much paper
Control & access to project files
- Need to access & link all docs associated with Engineering & Quality Assurance docs.
- For different versions

Ability for field staff to capture Quality Assurance docs
Not able to track & approve submitted forms

DocLink Solution

Paper completely eliminated
- No more printing, copying, scanning, distributing massive document sets

Manual processes eliminated
- Quick and easy access to complete project files
- Automated workflows, rules, triggers, & alerts

Results

Better document control
Documents accessible to everyone digitally
Greater visibility, management of project documents
Seamless transition to remote workforce during pandemic

Legal/Contract Management

CONTRACT MANAGEMENT

STORAGE & MANAGEMENT OF DOCUMENTS

Safeguard Vital Records Electronically

SEARCH & COMPLIANCE

Easy Access Anywhere, Anytime, Expiration & Retention Alerts

VERSION CONTROL/ DOCUSIGN ELECTRONIC SIGNATURE

Audit Trail Timely Approvals

CONTRACT TEMPLATES

Reduce Data Entry & Duplicate Copies

FULL TEXT SEARCH

QUICK SEARCH   ADVANCED SEARCH   **FULL TEXT SEARCH**   WORKFLOW   VERSION CONTROL   SMART FORMS ▾

Companies

Toggle All Companies
- ☑ Demo Company
- ☑ MyCompany

Document Types

Toggle All Document Types
- ☐ Bill
- ☑ Contract

Search Term

Altec

- ⦿ Find documents containing the exact phrase or all of the words
- ○ Find documents containing any of the words
- ○ Use search operators and punctuation

QUICK SEARCH   ADVANCED SEARCH   **FULL TEXT SEARCH**   WORKFLOW   VERSION CONTROL   SMART FORMS ▾

Contract: Created: 1/21/2020
... "Effective Date"), by and between **Altec** Inc. , with an address of 123 Main Street, Laguna Hills, CA 92688 (the "Seller") and Awesome Networks , with an address

Contract: Created: 1/21/2020
... San Francisco, CA 98048 and **Altec** Inc. ("Company") located at 123 Main Street, Laguna Hills, CA 92688. (Customer) and (Company) may also be referred to as

Contract: Created: 1/21/2020
... ("Agreement") is being made between **Altec** Inc. (that's "You" or "Your") located at 123 Main Street, Laguna Hills, CA 92688 and Pinnacle Marketing Inc. (that's "W

Contract: Created: 1/21/2020
... "Effective Date"), by and between **Altec** Inc. , with an address of 123 Main Street, Laguna Hills, CA 92688 (the "Client") and Perfect Designs, with an address of 49

1 to 4 of 4   ‹ **1** ›

VERSION CONTROL

Version ▾

☑			Document Type	Pages	Comments	Contract Number	Contract Request	Customer ID	Customer Name	Doc Date	Effective Date	Email	Expiration Date	Location	Request Date	Requested by	Tran
☑	⧉	⋮	Contract	0		AF-01-				1/1/2016			8/1/2017	1111	9/28/2017	Administrator	
☐	⧉			0		AF 09-				9/20/2017			9/20/2018	1111	9/28/2017	Administrator	
☐	⧉			0	Printing Press	APC 09				9/20/2017			9/20/2018	1111	9/28/2017	Administrator	
☐	🖼			2		AF-01-					1/31/2018		1/31/2019	Building A			LOA
☐				0		AF-01-					1/31/2018		1/31/2019	Building A			SOW
☐	🖼			2		AF-01-											

Menu (context):
- 📂 Open
- ⬇ Download Document
- 🖨 Print Document
- ✉ Email Document
- 💬 View Notes   **0**
- ℹ Document Info
- 🗑 Delete
- 🔒 Check out
- 👤 Check In
- 🔓 Undo Check Out
- ⧉ Versions

20 ▾

Document Version History   ✕

	Version	Checked In	By
⬇	7	11/02/2018 8:40 AM	Administrator
		updated	
⬇	6	08/01/2018 9:29 AM	Administrator
		revision #6	
⬇	5	07/26/2018 12:21 PM	Administrator
		update	
⬇	4	07/24/2018 12:46 PM	Administrator
		updated	
⬇	3	07/17/2018 8:10 AM	Administrator
		updated name	
⬇	2	09/20/2017 6:43 AM	Administrator
		Admin Update. Auth by CO	
⬇	1	08/16/2017 11:53 AM	Don - President

CLOSE

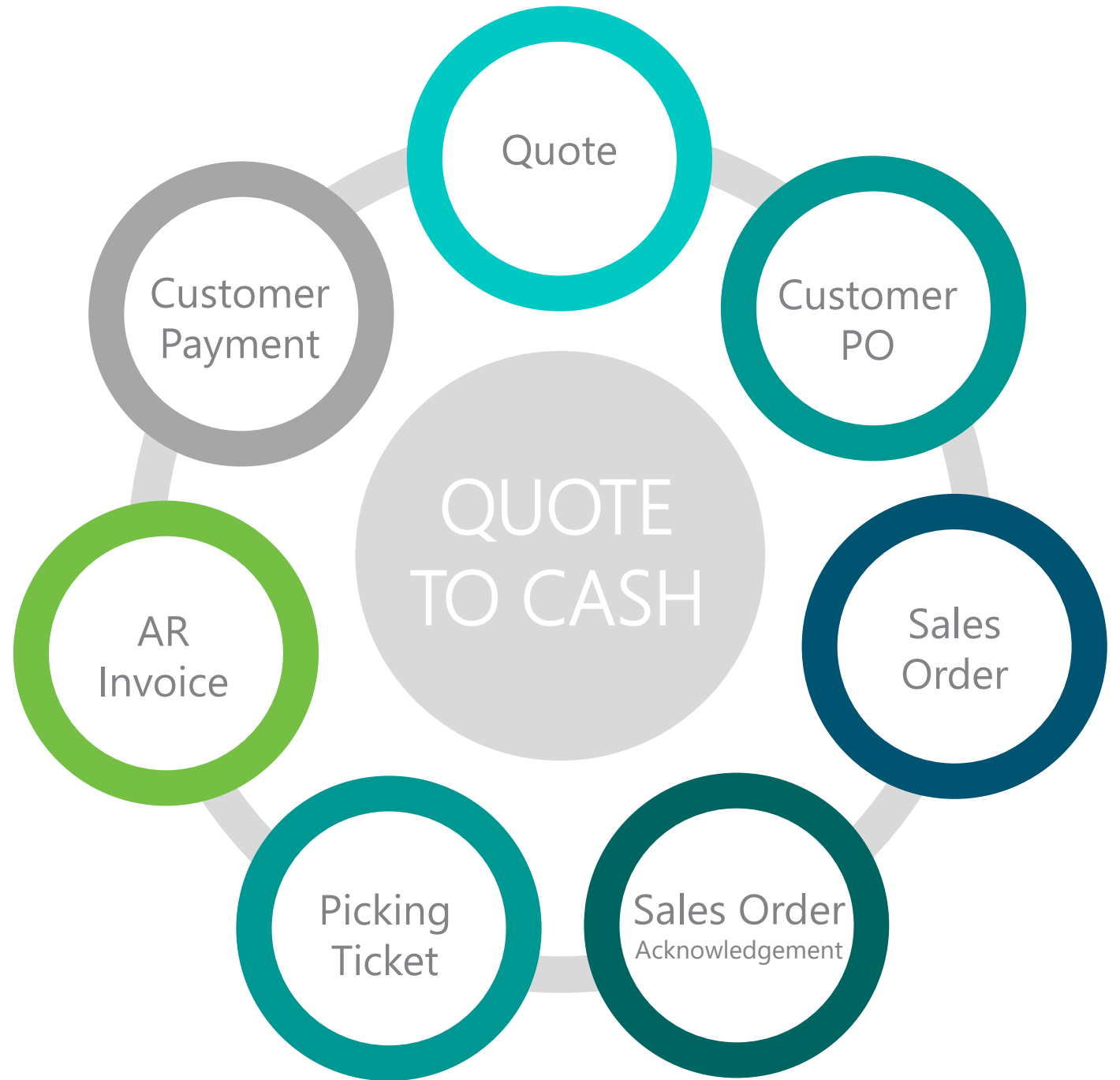# DIGITAL SIGNATURES

Sales Order Processing

Automation saves businesses between $5-15 per sales order, and reduces sales order cycle times by more than 46%.

According to APQC Research

BENEFITS

Reduce or eliminate data entry

Control approval cycle

Quickly distribute AR invoices & backup

Frees staff for value-add tasks

AR INVOICES WITH SUPPLEMENTAL DOCS

CASE STUDY

American Fruits and Flavors

AFF was growing rapidly & needed to automate and streamline their processes. In AR, an entire trailer was necessary to store all of the paper.

90%

Decrease in time spent on AR invoices

DocLink Solution

- Accounting Implementation
- Automated routing of AR Invoice & supporting documents
- Supporting documents are easily accessible for invoices/sales
- Instituted a variety of permissions for users across departments

Results

- 90% decrease in time spent on AR invoices
- Growth without adding AR headcount
- Eliminated physical storage

American® Fruits and Flavors

What departments are you looking to improve or enhance?

A. Accounts Payable

B. Contracts Management

C. Sales Order Processing

D. All

AP Automation

Return Batch | Save Batch

Left form panel:

Document Type: AP Invoices

Field	Value
DOCUMENT TYPE	AP Invoices
VENDOR OCR	29085 NETWORK PLACE
VENDOR NAME	EATON CORPORATION
VENDOR CODE	1001
COMPANY NAME	MyCompany
COMPANY CODE	MyCompany
DATE	10/19/2017
DUE Date	11/19/2017
INVOICE NUMBER	931044960
OCR PO Number	212306238
PO NUMBER	212306238
SUBTOTAL	516.08
TAX	20.64
FREIGHT	0.00

Document-1-Page-1
Document-2-Page-1
Document-3-Page-1

4 of 4 documents loaded (4p)

Submit

Line items table:

LINE NUMBER	ITEM	DESCRIPTION	QTY	UNIT PRICE	LINE TOTAL	LinePO
1	660020	SPCOBO480D2	0	516.08	516.08	212306238
2						

Right invoice image (OCR text):

EATON
Powering Business Worldwide

Original Invoice

Page 1 of 1

Eaton Power Quality Div
8609 Six Forks Rd
Raleigh, NC 27615

Please Remit To:
EATON CORPORATION
29085 NETWORK PLACE
CHICAGO, IL 60673-1290

Please Wire to:
JPMorgan Chase NA
New York, NY
SWIFT Code - CHASUS33
AC - 8803090468
Routing # - 071000013

Invoice No.
931044960
Delivery Note No.
8843272125
Order No.
212306238
Invoice Date.
10/19/2017
Quote No.

Bill-To:

Return Service Requested

Sold-To:

Ship-To:

Date Shipped	Ship-From	Customer No.	Customer P.O.		Currency
10/19/2017	PQD Youngsville Plant Operatio	32339			USD

Carrier	Tracking No.		Delivery
UNITED PARCEL SERVICE	1Z6Y52210369794313		PP1 , FOB ORIGIN

Item No.	Material Number	Quantity Ordered	Back Ordered	Quantity Shipped	UOM	Price	Value
	Catalog Number and Description						
000020	12914908	1	0	1	EA	516.08	516.08
	SPC080480D2P SPC080 kA 480V 3P NEMA 4X Fltr						

State 4.000% — 20.64
Total Taxes — 20.64

Invoice Amount in USD Up to 11/18/2017 without deduction — $536.72

Conditions:
Payment: Net 30 Days

These commodities, Technology or Software were exported from the United states in accordance with the Export Administration Regulations. Diversion contrary to U.S. law is prohibited.

Authorized Signature
END OF INVOICE

Outlook Email Window

AP Invoice is awaiting your approval - Message (HTML)

File   Message   Help   Tell me what you want to do

Share to Teams   Find

AP Invoice is awaiting your approval

Admin@myAltec.com
To approver@myaltec.com

Reply   Reply All   Forward

AP Invoice[7719].pdf
30 KB

Hello,

A new **AP Invoice** has arrived for you in the **CFO** workflow.

Details:

Document ID:	7719
Is Priority:	False
Received:	2:34:03 PM
Workflow Status:	CFO

Please click one of the links below to move the document to the associated workflow status

Approve

Deny

Adobe Acrobat Reader Window

Non-PO Advanced Office Systems Invoice.pdf - Adobe Acrobat Reader (64-bit)

File   Edit   View   Sign   Window   Help

Home   Tools   Non-PO Advanced ...   Sign In

1 / 2

Advanced Office Systems
678 Sherwood Park South
Arlington Heights IL 60004
618-555-0102

Invoice Number   66301
DATE   November 2, 2017

TO   Altec Sample Co   Advanced Office System:
Attn:
12600 S Torrence Ave
Laguna Hills Ca 92653

BUYER	PO Number	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE	PAYMENT TERMS	DUE DATE
Doug Tanner		GRD		10/23/17		11/12/17

QTY	ITEM #	DESCRIPTION	UNIT PRICE	DISCOUNT	LINE TOTAL
1	Print	Printer Stand	$ 90.00		$ 90.00

TOTAL DISCOUNT	
SUBTOTAL	$ 90.00
SALES TAX	$ 7.20
SHIPPING	$ 20.00
TOTAL	$ 117.20

businesscentral.dynamics.com/5424d5b6-5d33-4778-841e-8615e50c20fa/Sales?page=51&company=CRONUS%20USA%2C%20Inc.&dc=0&bookmark=29%3bJgAAAACLAgAAAAJ7BjEA...

Dynamics 365 Business Central

Purchase Invoice

107209 · Fabrikam, Inc.

Invoice | Posting | Request Approval | Incoming Document | Release | Navigate | Actions | Related | Fewer options

Invoice | View Docs - No. | View Docs - Vendor No. and Invoice No.

Vendor Name	Fabrikam, Inc.
Contact	Krystal York
Posting Date	4/8/2021
Due Date	4/30/2021
Vendor Invoice No.	107209
Status	Open

Lines | Manage | More options

Type	No.	Item Reference No.	Description/Comment	Location Code	Quantity	Unit of Measure Code
Item	1928-S		AMSTERDAM Lamp		5	PCS

Subtotal Excl. Tax (USD)	214.00	Total Excl. Tax (USD)	214.00
Inv. Discount Amount (U...	0.00	Total Tax (USD)	12.84

DocLink Web 4.0

web.qa.doclinkcloud.com/DocLinkWeb//#/searchByProperty/ID/30/viewer/30

SEARCH | WORKFLOW | TOOLS | SMART FORMS | MARK WHITBECK

SEARCH | SUPERVISOR | DELEGATE

Integration Enabled? ✔

Return to Results | Smart Forms ▽

Vendor Invoice: 30

Page 1 / 2 | 27%

Fabrikam, Inc
10 North Lake Avenue
Atlanta, GA 31772
Phone: (425)555-0101

Invoice Number 107209
DATE October 13, 2021

TO CRONUS, USA
Attn:
12600 S Torrence Ave
Laguna Hills Ca 92653

Fabrikam, Inc

BUYER	CONTACT	SHIPPING METHOD	SHIPPING TERMS	SERVICE DATE	PAYMENT TERMS	DUE DATE
SE		N/A		10/3/21		10/23/21

QTY	UOM	DESCRIPTION	UNIT PRICE	DISCOUNT	LINE TOTAL
20	Hours	Services	$ 150.00		$ 3,000.00

GENERAL | NOTES
WORKFLOW HISTORY
AUDIT HISTORY | INDEX

DOCUMENT

Document ID:	30
Document Type:	Vendor Invoice
Company:	CRONUS USA, Inc.
Site:	D365BCDemo

ORIGINATION

INDEX PROPERTY VALUES

Vendor Invoice:	AP
Invoice Number:	107209
Vendor Number:	10000
Vendor Name:	Fabrikam, Inc.
Invoice Date:	Oct 13, 2021
Invoice Total:	3,260.00
Pay To Vendor Name:	Fabrikam, I
Pay To Vendor No:	10000
Tax Amount:	0.00
Tax Liable:	True
Voucher Number:	107209
Line:	1
GL Account:	20100
GL Acct Description:	Accounts Pa

Contract Management

QUICK SEARCH ADVANCED SEARCH FULL TEXT SEARCH VIEW DOCUMENTS BY ID

Search Term
agreement

🔍 SEARCH

SEARCH CRITERIA

Collapse to hide search criteria

COMPANIES

❌ CRONUS USA, Inc.

DOCUMENT TYPES

❌ Contract   ❌ Vendor Invoice

FILTER BY ENTRY DATE

(From)
MM/DD/YYYY

(To)
MM/DD/YYYY

4 Results - "agreement"

Document ID: 56 Contract: Created: 05/31/2022
... This Car Rental **Agreement** ("**Agreement**") is made and entered into ...arties" in the plural. This **Agreement** is subject to the following...he Parties agrees that this **Agreement** terminates upon the End Date specified above. Notwithstanding anything to the contrary in this Agreement or any Exhibits, either Party may terminate this Agreement prior to the End Date w...

Document ID: 1089 Vendor Invoice: Created: 03/13/2023
... product is covered by a license **agreement** provided with the software ...k Next. 7. Read the license **agreement**, select the I accept the terms in the **agreement**, click Next. 8. Enter your Name and Organization, click Next. 9. Select the type of setup you want to install. a. Complete installs Scan-Link to the default directory (C:\P...

Document ID: 1080 Vendor Invoice: Created: 12/08/2022
... product is covered by a license **agreement** provided with the software ...k Next. 7. Read the license **agreement**, select the I accept the terms in the **agreement**, click Next. 8. Enter your Name and Organization, click Next. 9. Select the type of setup you want to install. a. Complete installs Scan-Link to the default directory (C:\P...

Document ID: 55 Contract: Created: 05/31/2022
... or more provisions of this **agreement** shall not affect any other provision of this **agreement**. This **agreement** is subject to the laws and regulations of the state of California Signed: _____ _____ Sean Turner Altec _____...

Items per Page 20   1 to 4 of 4 |< < > >|

ADVANCED SEARCH FULL TEXT SEARCH VIEW DOCUMENTS BY ID

1 RESULTS - CONTRACTS

	DOCUMENT TYPE	PAGES	CHECK AMOUNT	CHE
☑	Contract	0		

Menu items:
- Open
- Document Preview
- Download Document
- Print Current Image
- Print Current Image With Notes
- Email Document
- Re-Index
- Document Info
- View Notes — 0
- Delete
- Send to Workflow
- Check Out
- Check In
- Undo Check Out
- Versions

ORDER NO. VENDOR CODE VENDOR NAME
AIRWAY Airway Property

Items per Page 20   1 to 1 of 1

Document Version History

VERSION ⬆	CHECKED IN	BY
4	2021-01-15 09:57:50	Cheryl Contreras - AP
made some updates		
3	2021-01-15 09:12:13	Administrator
2	2017-08-03 10:58:10	Administrator
ver 2		
1	2017-08-03 10:57:10	Administrator

Items per Page 20   1 to 4 of 4

Download   Close

File   Message   Help   Tell me what you want to do

Delete | Respond | Quick Steps | Move | Tags | Editing | Speech | Zoom

Team Email
Done
Reply & Delete

Mark Unread
Categorize
Follow Up

Mon 11/26/2018 2:30 PM

DocuSign NA3 System <dse_NA3@docusign.net>

Please attend to the following document

To   Merri Jo Cleair

If there are problems with how this message is displayed, click here to view it in a web browser.

DocuSign.

DocLink Development sent you a document to review and sign.

REVIEW DOCUMENT

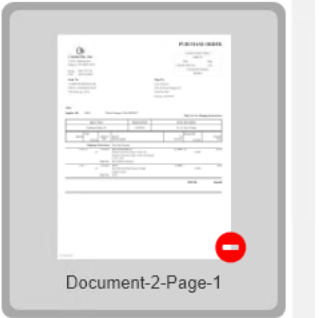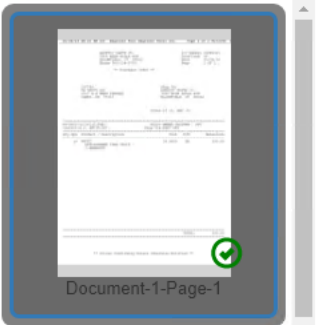**DocLink Development**
merrijocleair@altec-inc.com

Doug Baldwin,

Please DocuSign Rental Agreement[12508].DOCX

Thank You, DocLink Development

Sales Order Processing

DocLink | Home | Data Verification | Reports | Admin Panel | Create Batch | Help | admin

Return Batch | Save Batch

Document-1-Page-1
Document-2-Page-1
Document-3-Page-1
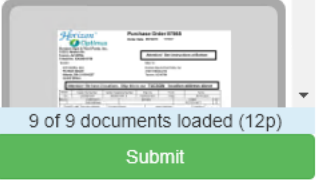
9 of 9 documents loaded (12p)

Submit

Field	Value
Document Type	Sales Order Automation Demo
CUSTOMER OCR	AQUATIC PARTS CO.
CUSTOMER NAME	Aquatic Parts Company
CUSTOMER ID	APC984
CUSTOMER STATUS	OPEN
PO DATE	01/30/2019
PO NUMBER	05PB2331
SHIP TO ADDRESS	AQUATIC PARTS CO. 1360 BLUE HILLS AVE BLOOMFIELD, CT 06002
SHIP TO ADDRESSEE	AQUATIC PARTS CO.
SHIP TO ADDRESS LINE 1	1360 BLUE HILLS AVE
SHIP TO ADDRESS LINE 2	
SHIP TO CITY	BLOOMFIELD
SHIP TO STATE	CT
SHIP TO ZIP CODE	06002

	CUST REF	PRODUCT #	PRODUCT DESC.	QTY	UNIT PRICE	LINE T
1	WPC	WPCTC	REPLACEMENT T	10	39.0600	390.6

01/30/19 09:25 AM EST Baystate Pool Baystate Pools Inc. Page 2 of 2 #272148

AQUATIC PARTS CO.
1360 BLUE HILLS AVE
BLOOMFIELD, CT 06002
Phone 800-234-6700

P/O Number 05PB2331
Location# 05
Date 01/30/19
Page 1 OF 1

** Purchase Order **

150700
SR SMITH LLC
1017 S.W.BERG PARKWAY
CANBY, OR 97013

Ship To:
AQUATIC PARTS CO.
1360 BLUE HILLS AVE
BLOOMFIELD, CT 06002

Terms:1% 15, NET 30

PO-Date:01/30/19 FOB:
Contact:S.R. SMITH,INC.
Buyer:GREGG GUIDONE - APC
Ship Via:BEST WAY

Qty-Opn	Product / Description	Cost	U/M	Extension
1 10	WPCTC REPLACEMENT TIME CLOCK V.PN#WPCTC	1 39.0600	EA	1 390.60

TOTAL: 390.60

** Prices Confirming Unless Otherwise Notified **

Left Document (Spec Sheet)

SpecNo: 4434	Part 1 Of 1		13-573	REPRINT

Quantity	Order No	Customer	
2500	**13573**	**MELS COMPUTERs**	

Due Date	Item	Style
2/13/2014	**DL1000**	**RSC**

Customer P/O	Finished Size	Grade
DL100	**10 X 10 X 10**	**I 200 C Kraft**

Date Entered	Sq Ft	No. Out	Over%	Under%	# In Set	Print Die	Cut Die	Total MSF	Vendor
2/13/2014	6.524	1	0.00	0.00	1			16.310	Performance Sheets

Finished Blank	Sheet Size	Joint	Joint Location	No Joints	Weight/M		
22 1/8 X 42 1/8	22 1/8 X 42 1/8	GLUED	Inside	1	365.35	Sheets Ordered 2500	Sheets Due 2/13/2014

Sheets P/O: 1236-1 Sheets Grade: I 200 C Kra

Size: Width 22 1/8 Length 42 1/8
Out: 1 1

2,500

Colors | Routing: 240 EMBA FLEXO(AS)

Add More TRIM next RUN

Other Material | Ship To: MELs COMPUTER 124 North 3rd DALLAS, TX 55435

Width	5.07 x 11.04 x 5.07
Length	10.01 x 10.03 x 10.03 x 10.03 x 1.08
Cumm Width	5.07 x 16.11 x 22.02
Cumm Length	10.01 x 20.04 x 30.07 x 40.10 x 42.02 905 35-5/8

Unitizing Instructions: PALLETS 40 x 48 560 Per Unit 4 Straps Height= 45 35 Per Bundle 1 Tags Per Unit
Special Instructions:

Shipping Instructions: DOCK APPT NECESSARY, PALLET EXCHANGE call for appointment now MMMMMMMM

Right Document (Delivery Receipt)

C.O.D. **Delivery Receipt**

Delivery Receipt No 971
Shipping Date: 2/13/2014
Page: 1

Ship To: MELs COMPUTER
124 North 3rd

DALLAS, TX 55435

Sold To:
124 North 3rd

DALLAS, TX 55435

Salesman	Ship Via	Truck	FOB
CAROL JOHNSON		OUR TRUCK	

Pkg	Release Quantity	Order No/Description	Customer P.O. Number	# Of Units	# Per Unit	Ship Qty	P C	Destination Weight
	2500 EA	13573-1-1 DL1000 Z4434-1-- 10 x 10 x 10	DL100	3	250	750 EA	P	
		RSC I 200 C Kraft 42/28M/42						
		DOCK APPT NECESSARY, PALLET EXCHANGE						
		call for appointment now MMMMMMMM						

Order Total 750 275

Total SQA: 4,893 Total Weight: 275

Received By: _____ Date: _____ Time: _____

BUSINESS PROCESS AUTOMATION

1. Capture & Delivery of Quotes/Order Acknowledgements

2. Integration & Automatic SO Creation

3. Handling of Signed Picked Tickets & Delivery Tickets

4. Auto-delivery of AR Invoices & Back Up

5. Integration & Retrieval of Documents

6. AR Aging Notification/Alert

DocLink

Document Management & Business Process Automation
Streamline Processes, Eliminate Data Entry, Easy Access to Documents

AP Automation (+3 way matching) & Beyond

$ ACCOUNTS RECEIVABLE

- Get invoices out quickly & easily
- Improve customer service
- Access supplemental documentation

HUMAN RESOURCES

- Expedite employee application review
- Automate onboarding processes
- Manage HR compliance & labor audits

LEGAL

- Version control & full text search
- DocuSign integration
- Monitor expiration & retention dates

FIELD SERVICE

- Access to documents in the field
- Record service call details
- Upload images/signed receipts instantly

FACILITIES MANAGEMENT

- Account for service request work
- Maintain timed routine procedures
- Manage multiple content pieces for projects

SALES ORDER PROCESSING

- Reduced cycle times
- Seamless ERP integration
- Easy access for best customer service

KEY DIFFERENTIATORS

	01	Enterprise wide solution – AP & Beyond
	02	OCR & automated matching
	03	Configurable workflow w/ automation rules
	04	Support your remote workforce: web & mobile
	05	Electronic "Smart Forms" configured to collect data for processing
	06	Perpetual, Subscription and DocLink CLOUD offerings

THINGS TO THINK ABOUT

Document Management & Workflow

- Is important to business process optimization and cost savings
- Integral to strategic planning initiatives.

Grow to Fit Your Needs

- Choose a solution that is scalable to both specific department needs and enterprise-wide.

Hard and Soft Costs

- Manual processes are expensive, both in hard and soft dollar calculations.
- Think about processes and where it fits in your strategy.

Map Your Processes

- Think about the cost implications at each step.
- What's broken and where you should spend time to fix it.
- Can be used to set a budget.