Taking Everything Digital with DocLink
Document Management & Process Automation

CURT HIXSON, SALES DIRECTOR

ALTEC

We live in a world of
instant access...

…so why is it hard to find anything at your office?

HOW ARE YOU STORING DOCUMENTS TODAY?

file cabinet

network
file share

software

Does your current system require a lot of touching, moving and filing of **paper**?

Is your invoice **approval process** manual and inefficient?

Do you spend a lot of time doing **data entry**?

BUSINESS PROBLEMS WE ALL FACE

WHAT IS DOCLINK?

capture

search & retrieve

workflow

automated delivery

DocLink **SMART FORMS**

DOCLINK for ACCOUNTS PAYABLE
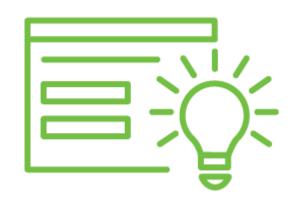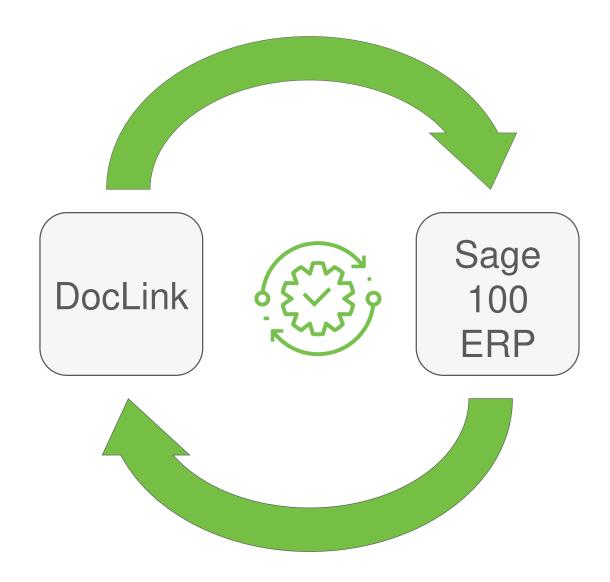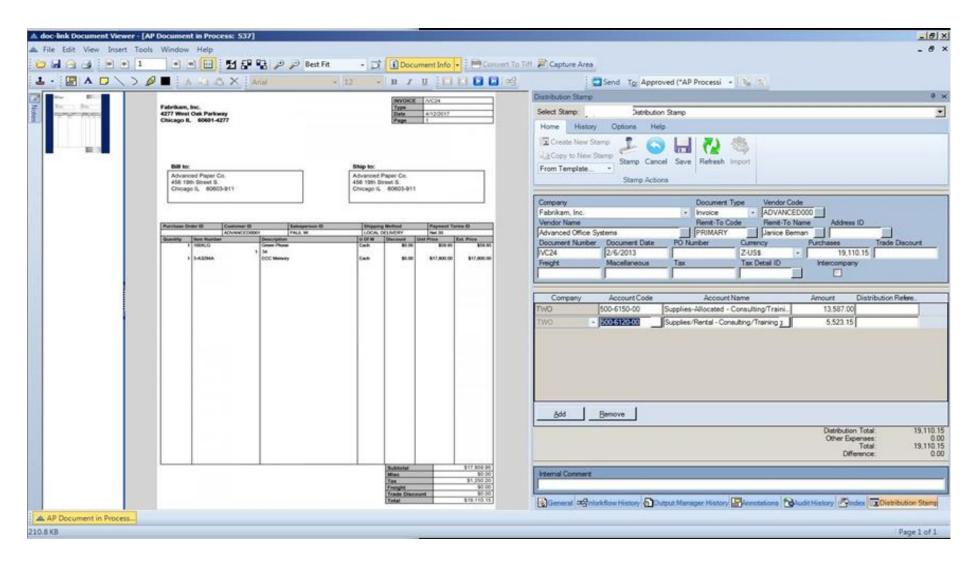
SEAMLESS INTEGRATIONS

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

DocLink

Sage 100 ERP

DocLink
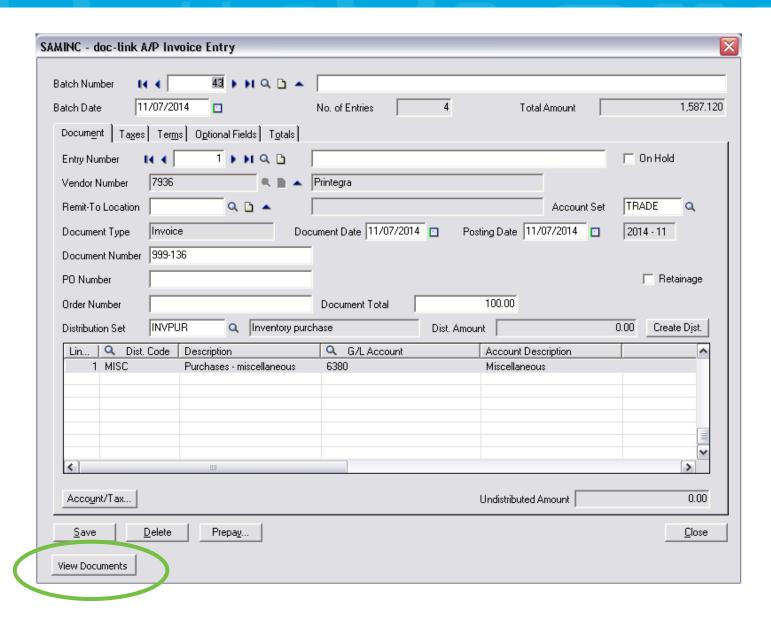
ERP INTEGRATION – GL SMART FORM

DIRECT ACCESS TO DOCUMENTS WITHIN YOUR ERP WINDOWS

SELF-SERVICE DOCUMENT ACCESS

- **Searchable via desktop & mobile**
- **Assign security permissions**

Company

Department

Document Type

Property Values

SECURITY

Give auditors access to:
- Documents for review
- Sophisticated activity reports

No more hunting down documents.

COMPLIANCE
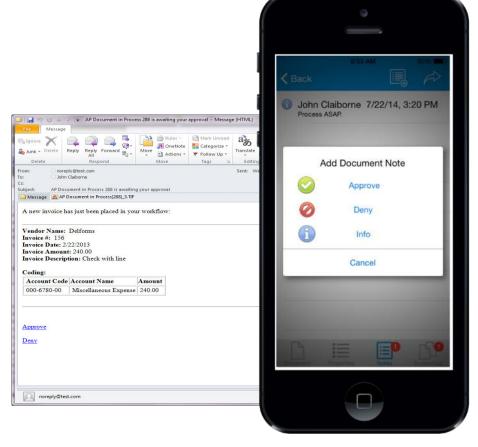
TIMELY APPROVALS FROM ANYWHERE

- **Eliminate late penalties**

- **Approvers respond through DocLink client, email, or mobile**

- **Set automated alerts & reminders**

- **Delegate workflow authority while away**

ELIMINATED FILING & MINIMIZED DATA ENTRY

Automate document capture (email, fax, scan, barcode, OCR)

Leverage existing ERP data

Reduce human error

Automate indexing

CAPTURE

CAPTURE OPTIONS:

EMAIL & FAX

ERM

DRAG & DROP

SCAN

BARCODE

OCR

CAPTURE
DATA
ANYWHERE

SEARCH & RETRIEVE

SELF-SERVICE
DOCUMENT ACCESS
THROUGH
MULTIPLE DEVICES

File   Edit   View   Insert   Tools   Window   Help

Document Info   Convert To Tiff   Capture Area

Arial   12   Send   To:

AP Purchase Order: 212

doc·link

Purchase Order

Altec
Enterprise Document Management

Date: 02/10/13
PO #:   TL-34604-8-011

To: Carl Lewis   Ship to: John Doe
      Printegra   Altec Products, Inc.
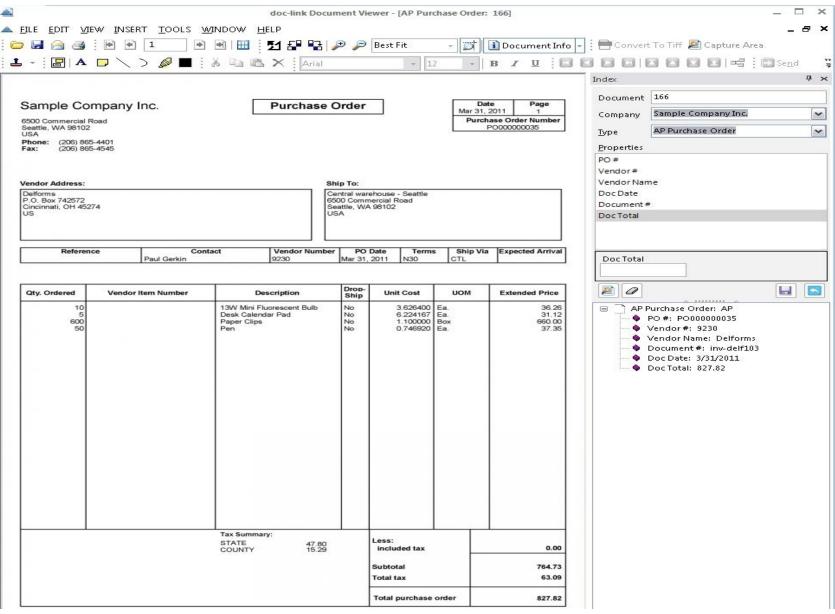   1551 Broadway   23422 Mill Creek Dr. St. 225
      Tacoma, WA 98402   Laguna Hills, CA 92653
      (206) 555-1551   (800) 997-9921

Salesperson	Job	Shipping Method	Delivery Date	Payment Terms	Due Date
Carl		UPS	2/14/13	NET 30	3/14/13

Qty	Item #	Description	Unit Price	Discount	Line Total
1200.00	FF-1256	Fan - apart form card	$ 2.50		$ 3,000.00
120.00	FL-8801	Form Label	0.05		6.00

Total Discount

Subtotal $ 3,006.00
Sales Tax   180.00
Total $ 3,186.00

AP Purchase Order: 21...   AP Invoice: 225   AP Signed Delivery Rec...
17.2 KB

DATE	6/22/02	CHECK NUMBER	190014

INVOICE NUMBER	INVOICE DATE	VOUCHER NUMBER	VOUCHER DUE DATE	GROSS AMOUNT	DISCOUNT	NET AMOUNT
114090		CA232		42.50		42.50
114091		CA242		103.00		103.00
114092		CA270		35.55		35.55
114093		CA311		212.00		212.00
114094		CA322		50.80		50.80
114095		CA325		23.20		23.20

PRINT BATCH NUMBER	VENDOR CODE	PAY TO NAME		GROSS TOTAL	DISCOUNT TOTAL	NET TOTAL
		Envelope Mart		467.05		467.05

Altec
Altec Products, Inc.
23422 Mill Creek Dr., Suite 225
Laguna Hills, CA 92653
800-997-9921

DATE	6/22/02	CHECK NUMBER	190014

PAY   Four Hundred Sixty-seven and 05/100 ************************

TO THE
ORDER   Envelope Mart
OF   PO Box 307   AMOUNT $467.05
         Toledo, OH 43691

AP Invoice: 225

Printegra   INVOICE
1551 Broadway
Tacoma, Wa 98402   (206) 555-1551

SOLD TO:
Altec Products, Inc.   INVOICE NUMBER   536524
23422 Mille Creek Dr. St. 225   INVOICE DATE   February 14, 2013
Laguna Hills, CA 92653   OUR ORDER NO.   TL-34604-8-011
                                  YOUR ORDER NO.   1892727
                                  TERMS   Net 30
SHIPPED TO: SALES REP   Name
Same   SHIPPED VIA   Air
                                  F.O.B.
                                  PREPAID or COLLECT   COLL

Sales Tax Rate: 5.00%

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1,200	Fan apart Form Card	2.50	$3,000.00
120	Form Label	0.05	6.00

SUBTOTAL   3,006.00
TAX   150.30
FREIGHT   FREE
           $3,156.30

DIRECT ALL INQUIRIES TO: **MAKE ALL CHECKS PAYABLE TO:**
Accounts Receivable   Printegra
(206) 555-1551   Attn: Accounts Receivable
email: AR@Printegra.com   1551 Broadway
                                      Tacoma, Wa 98402
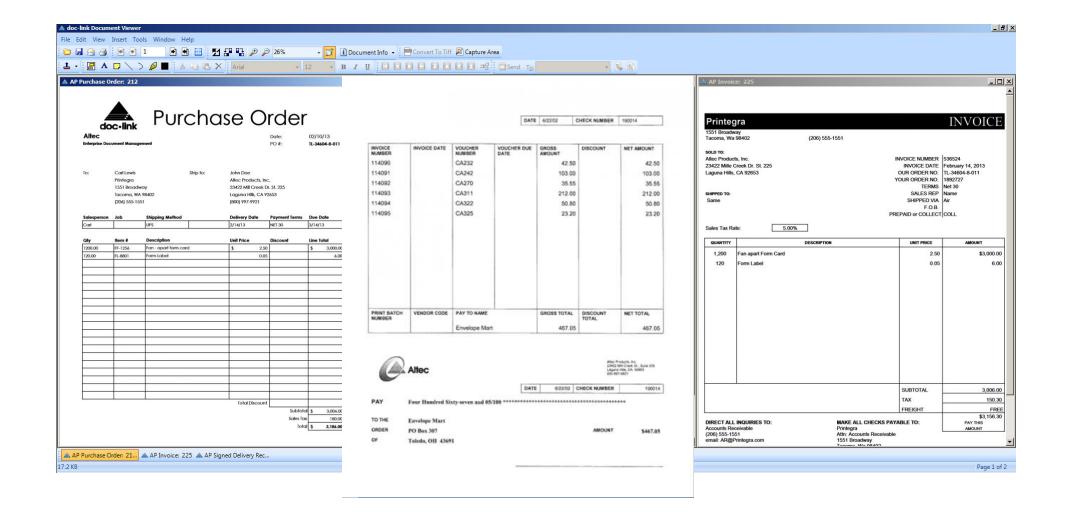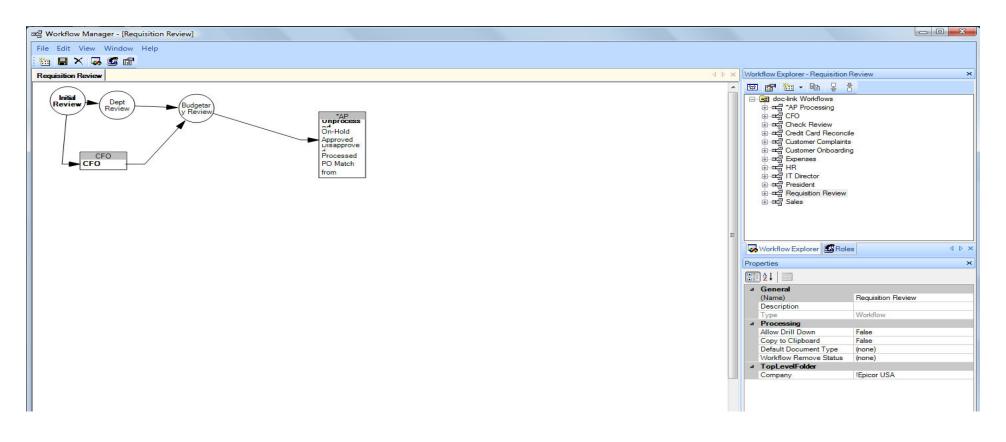
PAY THIS AMOUNT

DocLink

WORKFLOW

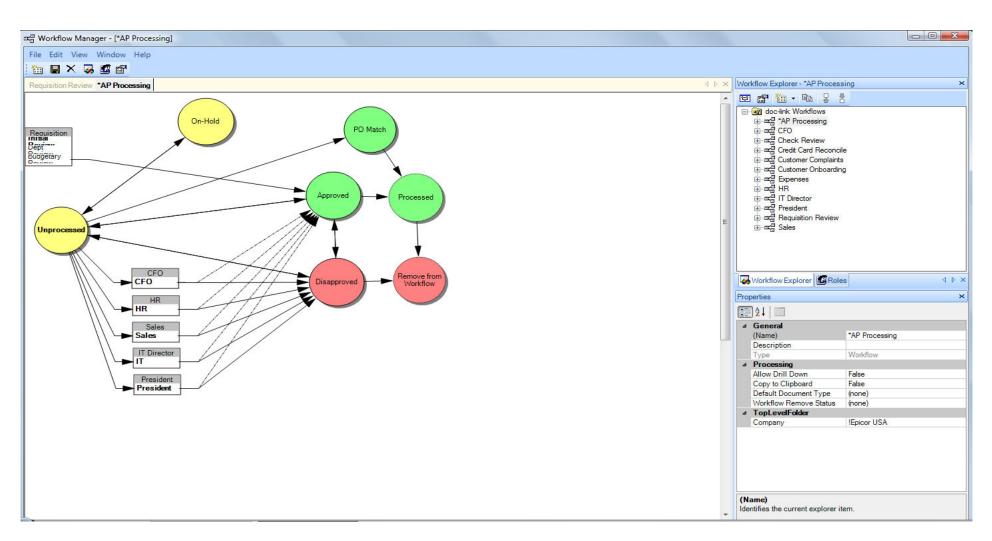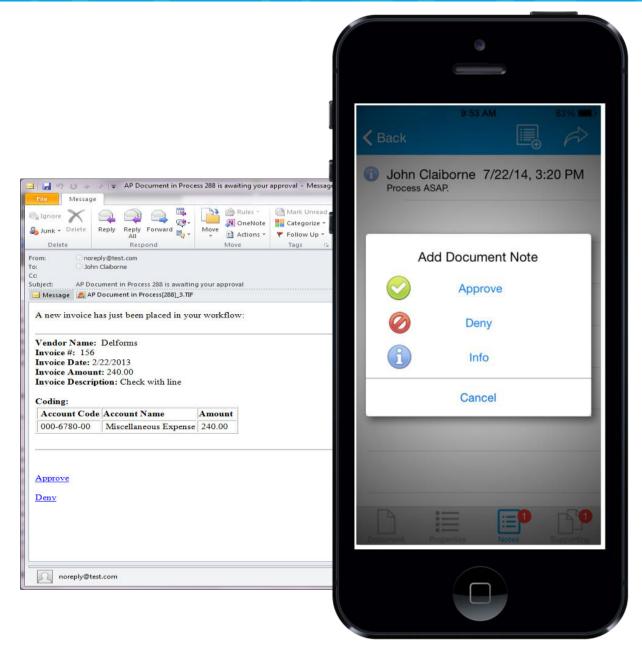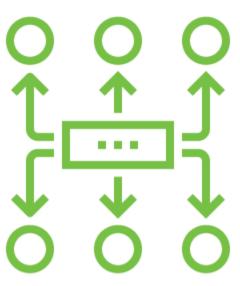# WORKFLOW CONFIGURATION - REQUISITION

WORKFLOW CONFIGURATION – AP SAMPLE
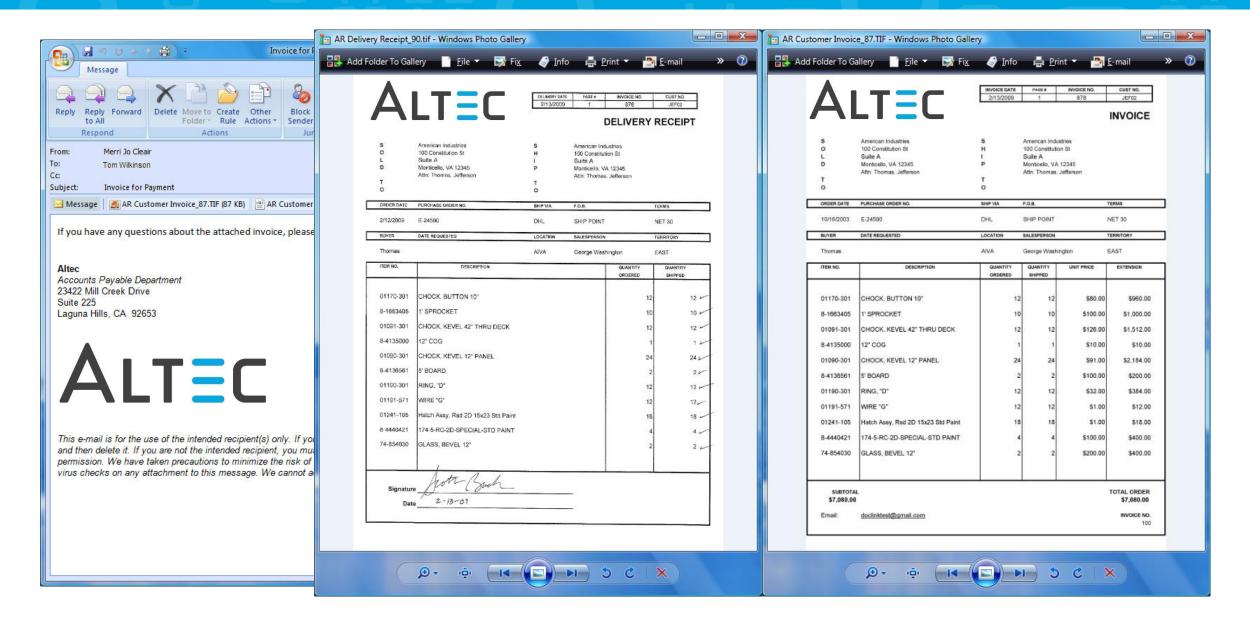
APPROVALS FROM YOUR MOBILE DEVICE AND EMAIL
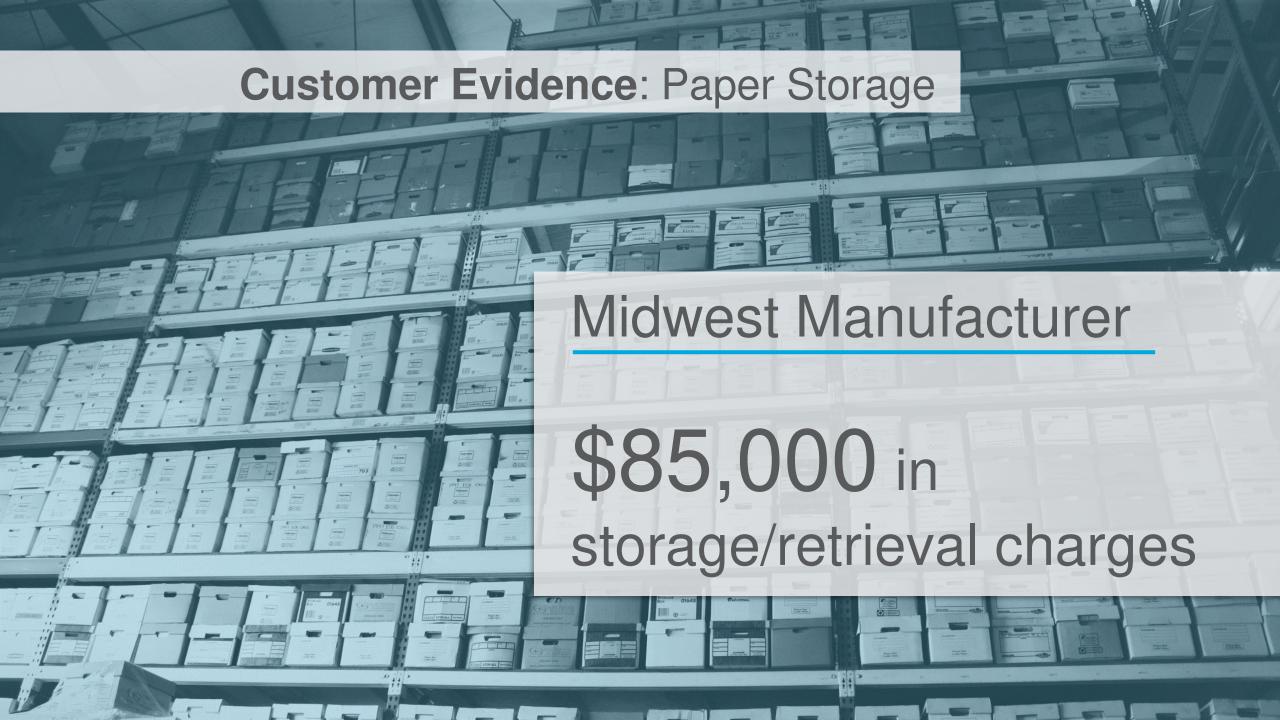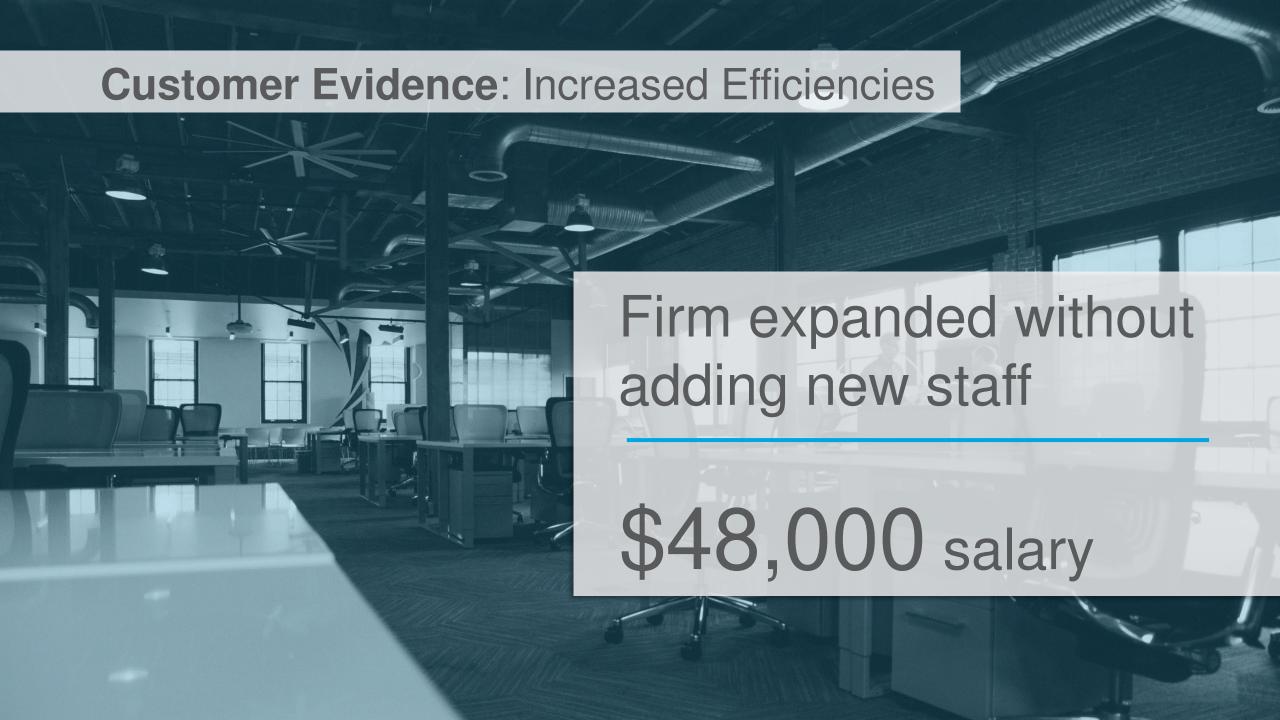
DELEGATE WORKFLOW AUTHORITY WHILE AWAY

AUTOMATED DELIVERY

CUSTOMER ROI

Customer Evidence: Paper Storage

Midwest Manufacturer

$85,000 in storage/retrieval charges

Government & education software developer

$11,000 annually in postage only

Customer Evidence: Increased Efficiencies

Firm expanded without adding new staff

$48,000 salary

WHY DOCLINK?

world-class
products

rapid
implementations

outstanding
customer
support

QUESTIONS?

DocLink

Are you ready to Take Everything DIGITAL?

ALTEC

800.997.9921 x1255 | doclinksales@altec-inc.com