eDMS
for sage ERP X3

FROM THIS

eDocument Management (eDMS) for managing Financial Risk, Corporate Governance and HR Documents

CREDITORS DOCUMENTS

DEBTORS DOCUMENTS

SALES

E-MAILS

eDMS
By **DocuVision**

HR

CUSTOMER & SUPPLIER DOCUMENTS

PROCUREMENT

TO THIS

01 The Problem

- Tired of customer's asking you to email another copy of their POD before they'll make payment on their account?
- Can't find the contract relating to the supply of goods or services to your company and you want to cancel?
- CORPORATE GOVERNANCE is a major RISK to all businesses.
- Wouldn't it be really nice if at the click of your mouse, the document you need appears on your screen – in seconds? And if required it can be faxed or e-mailed immediately as proof?

02 The Solution

DocuVision eDMS is ideal for creating "**DIGITAL FILING CABINETS**" of paper or digital documents for AR, AP, procurement, master ACCOUNTS, HR etc. Once indexed according to customer require-ments, these documents can be easily searched for and viewed on your computer, saving incredible amounts of time. Reduce bad debts, prevent fraud, avoid lost documents and sabe printing costs. DocuVision eDMS removes the risks and costs arising from lost documents.

Digital documents such as e-Mails, Word, Excel or Adobe Acrobat can also be "saved" directly to the "**DIGITAL FILING CABINETS**" ensuring a complete history of all documents are kept together.

Our Implementation methodology ensures rapid ROI and rapid staff acceptance – Based on a solid strategy adopted at many companies, we embrace management requirements and get staff buy-in and adoption by following a participative approach to the system design and training.

03 The Benefits

DocuVision eDMS:
- Improves staff productivity and morale by giving everyone fast access to the documents they need.
- Provides better customer services.
- Ensures quicker debtor collections.
- Manages your accounts PAYABLES better. Manages all purchasing documents.
- Helps comply with legal requirements including the ECT Act, King II, FICA, Labour Act, Sarbanes Oxley and other regulations concerning the secure archival of documents.

Demo videos: Speak to us about our short demo videos.

eDMS

Once captured, DocuVision eDMS documents can be tagged with data from the user or from processes such as barcode recognition or optical character recognition.

Custom document fields are easy to create and include the ability to integrate with any 3rd party software application via a simple, but powerful, API. This dynamic data lookup feature can display data from Sage ERP X3, Sage CRM or any other business software.

❯ Barcode Recognition
The Barcode recognition and extraction module is capable of recognising many barcode types .This module can read barcodes placed on your POD's or PO's for instance and archive the document automatically.

❯ Automation
The Import Module can automate the archiving of digital business documents such as waybills from couriers, invoices, statements, purchase orders, financial reports and e-Mails.

04 ❯ Information lifecycle management
Documents are the lifeblood of any business as they contain key **information** for the running of the business . Attaining easy access to financial or other documents is critical for staff to make key decisions.

05 ❯ Functionality at your fingertips
DocuVision eDMS ensures that the functionality you need is always at your fingertips. Every version of DocuVision eDMS is built on an enterprise-strength database.
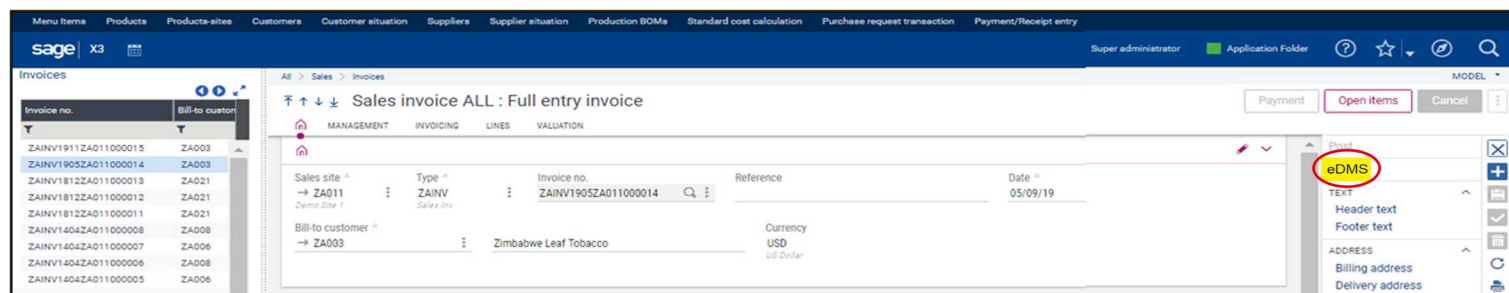
06 ❯ DocuVision eDMS has the following core features

❯ Drill down from Sage X3
By using the drill down button built into Sage X3, you can pull up documents at transaction or master account level. You can also upload to eDMS from inside X3 as well as email archived documents.

- **Simple user interface** - makes it easy for casual or first time users.
- **Scan and Index** - for capturing documents and attaching relevant Index information for flexible searching.
- **Search and View** - find documents quickly.
- **Distribute** - for e-mailing, printing and faxing of stored documents directly from DocuVision eDMS.
- **eMail documents as attachments or as hyperlinks** within an email or within a statement or as a personalised report for managing debtors, creditors, quotations and other business processes.

❯ Capture paper or electronic documents
Capturing and storing any document in DocuVision eDMS is easy thanks to a range of built-in capture features . The document scanner module captures information from paper documents via many supported scanners and office multifunctional devices.

Electronic office documents and e-Mails can be dragged and dropped directly into DocuVision eDMS cabinets, or saved directly from Outlook or Microsoft Office.

❯ Search for documents
Advanced search options from SAGE X3 or the DocuVision web interface to enable users to use complex search criteria.

❯ Reports
Possibly the most powerful tool is the easy to use REPORT MODULE which allows you to manage which POD's or other key documents as "MISSING" or "EXPIRING". We compare document No's created in X3 and report on which of these documents have not yet been scanned or imported, reducing risk.

❯ Start small, grow BIG
eDMS for Sage X3 can be implemented for a single document process and can grow into a full paperless office.

For a full presentation or for any queries, please contact Philip or Clark on 010 593 0856 or email sales@docuvision.co.za.