Sage ERP X3

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Document Management

Benefits

- Save storage space and eliminate external archiving costs

- Eliminate filing, photocopying, printing, and envelope stuffing and immediately provide all documents throughout the company

- Adhere to all your regulations with secure archiving practices without the paperwork

- Reduce risk of losing vital documentation and keep important documents in a secure repository rather than on workstation hard drives and in email inboxes

- Simplify data additions from legacy systems and integrate non-ERP documentation

- Use less paper and make fewer copies while leveraging a more efficient document delivery method

- Use an OCR scanner to efficiently incorporate information, such as automatically populating data entry screens with vendor invoices

Fully integrated document management functionality extends the reach of Sage ERP X3 beyond system-generated documents to provide more control over document flow, increase archiving efficiencies, and streamline document distribution by email or fax. Electronic Document Management (EDM) allows management of all your documents within your normal ERP workflow without the need to connect to a third-party application.

EDM allows you to collaboratively and easily capture, view, edit, and attach all documents related to your Sage ERP X3 records. When you receive documents, you can efficiently scan them using OCR (Optical Character Recognition) so they are added to the system, indexed using document numbers and keywords found in the document, and automatically associated to the appropriate records. Once stored, efficiently search and distribute any archived document along with the documents that are generated by your system. Going green with EDM saves on real costs such as postage,

stationery, and storage space and reduces the profit-killing inefficiencies of filing and retrieving hard copies.

Sage ERP X3 Electronic Document Delivery (EDD) is also available, which includes the ability to automatically email or fax system-generated documents. When authorized to do so, non-ERP users also have the ability to drag and drop documents into the system using an EDM folder on their desktop. The new EDM and EDD components are: faxing, emailing, OCR, barcode document scanning, archiving, and unified search.

Sage ERP X3 Electronic Document Management (EDM) fully integrates automated management and archiving of all documents both inside and outside your ERP system. Archived documents can be securely and immediately accessed at any time through the Sage ERP X3 system or through a web browser, eliminating the need for traditional paper-based document storage and reducing the time associated with filing and retrieving business documents.

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Automated Document Archiving

Documents generated by Sage ERP X3 can be automatically deposited in the Sage ERP X3 EDM repository. Simply by selecting the "Archive" destination, reports and other documents generated through SAP® Crystal Reports can be converted to PDF format and archived. Documents normally generated in batches, such as customer invoices and statements, are automatically broken down and archived individually. The archived copies are linked to the transaction and/or business partner, as appropriate. Microsoft Office® documents and transaction log files generated by Sage ERP X3 can also be stored in the repository.

More Secure Attachments

The attachments feature, which normally allows files in shared folders to be linked to objects in Sage ERP X3, now links to the EDM repository so that documents are securely archived and available to all users without the need for access to shared folders. Documents archived in the repository cannot be overwritten or accidentally deleted. New versions are automatically given a new revision number.

Automated Documents by Email or Fax

Outbound documents and reports generated through SAP Crystal Reports can be emailed or printed at the same time as being archived. An entire "print run" of documents such as invoices, statements, or remittances can be processed together, with each document being sent to the relevant email address or printer automatically. Email addresses can be looked up automatically from the Sage ERP X3 database or read from fields on the document itself. Documents can also be automatically faxed—either through an SMTP fax gateway or using an optional fax server.

Instant Access to All Documents

Once a document has been archived, it can be accessed by any user of Sage ERP X3—through the Attachments button, through new "Documents" buttons on key screens, or through the Sage ERP X3 web portal. Documents archived outside of Sage ERP X3 through a scan station, the Windows desktop deposit client, or other Sage products, such as Sage CRM, are also available as long as they are connected to a Sage ERP X3 business partner, transaction, or product.

Drag-and-Drop Filing From the Windows Desktop

Outside of Sage ERP X3 users can archive documents through the EDM Deposit client on the Windows Desktop. Files can be dragged and dropped into the system and associated with the relevant section in the archive. Emails can be dropped in directly from Microsoft Outlook with the sender, date, and subject being automatically transferred to the archive. Emails can be archived complete with any enclosed attachments, or alternatively the attachments themselves can be dropped in and archived as independent records.

Web Enabled

Outside of Sage ERP X3 documents can be accessed from a new web-based portal. Access levels can be defined to give "external users" access only to selected sections of the document repository. The interface allows users to search the categories to which they are granted access. Regular searches can be stored for single-click access. Now everyone across the organization can view the documents they need—instantly.

Batch Scanning and Automated Indexing

Adding a scan station to the Sage ERP X3 EDM Solution allows large batches of documents to be scanned quickly and efficiently. Indexing is fast and reliable, as metadata is cross-checked against the Sage ERP X3 database. Transactional documents, such as orders, invoices, and proofs of delivery can be separated and indexed automatically using bar codes and indexed automatically using bar codes that printed directly from Sage ERP X3 at the time of the transaction.

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