DocLink

for Sage

WHAT WE DO

Altec is a leading provider of document management and process automation solution DocLink, a Sage-endorsed solution which helps companies connect their people, processes and data. Tightly integrated with Sage 100, Sage 300, Sage 500, Sage X3 and Sage Intacct solutions, DocLink helps you go paperless and automate tasks in any department – accounts payable, accounts receivable, human resources, legal, IT and more – streamlining operations and improving visibility and control to your entire document lifecycle. By eliminating paper and human error, documents can be captured, created, processed and approved by anyone, anywhere, on any device. Ultimately, DocLink enables you to digitally transform your operations and improve productivity throughout your enterprise.

TOP 3 BENEFITS OF AUTOMATING WITH DOCLINK

UNLIMITED DATA ACCESS

Any document, any time, from any where

AUTOMATE ANY DEPARTMENT

Eliminate manual tasks for greater efficiency

GREATER VISIBILITY

Automate processes for streamlined operations

"

*Our people can instantaneously have all the documents they need at their fingertips, whether they're **in the office** or working remotely.*

BENJAMIN PINDER
Pinder's Customs Brokerage

SOLVING BUSINESS PROBLEMS

Take your first step towards going paperless with DocLink! By eliminating manual processes for many day-to-day tasks, you'll benefit by better communications with your customers, vendors and employees.

1 DISPARATE BUSINESS DATA
CAN'T FIND DOCUMENTS

DocLink brings all types of documents and data into one central repository that's easy to access (you don't have to be in your ERP). Our robust solution digitally captures any document for any process, allowing you to eliminate storage silos and search and retrieve whatever you need.

2 INEFFICIENT WORKFLOWS
TOO MUCH TIME COMPLETING TASKS

DocLink provides powerful, configurable workflows that allows you to control your processes through automation. From invoices that arrive at various locations to PO processing or putting HR applications through a review process, anything is possible to create and automate.

3 LACK OF VISIBILITY
CAN'T SEE WHAT'S IN PROCESS

DocLink provides the visibility you need to more closely monitor workflow statuses and track pending documents stuck in workflows. This allows to you take advantage of early pay discounts, manage audit trails of changes from your team, improve financial reporting, and streamline accounting regardless of multiple locations or even multiple departments.

4 OPERATIONAL INEFFICIENCIES
PAYMENTS DELAYED, STAFF INEFFECTIVE

DocLink can help streamline essential tasks throughout your organization, from data entry and payments and approvals, to reconciliations and matching. You can also support a mobile and remote workforce by giving them the ability to capture, access, approve and send documents no matter where they are working.

OUR DOCLINK SOLUTION

Our seamless integration to your Sage ERP guarantees **ease of use** and **efficiency** for your entire team.

Document Management

Overcome inefficiencies and effectively manage and track your digital documents wherever they are. Manage data better with an effective and holistic management solution that works with you every step of the way.
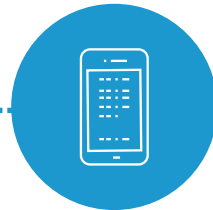
Smart Forms

Configurable windows that allow you to automatically create and index documents. Examples include expense reports, credit card statements, HR onboarding, and new vendor requests.

Document Capture

Capture and index any documents generated internally and externally through a variety of methods, including email, fax, scan, OCR, ERM, XML, barcode and mobile.

Mobile & Remote Access

Employees can work from anywhere, on whatever device they are using. Allow your team to securely access, approve, capture and submit documents in any situation.
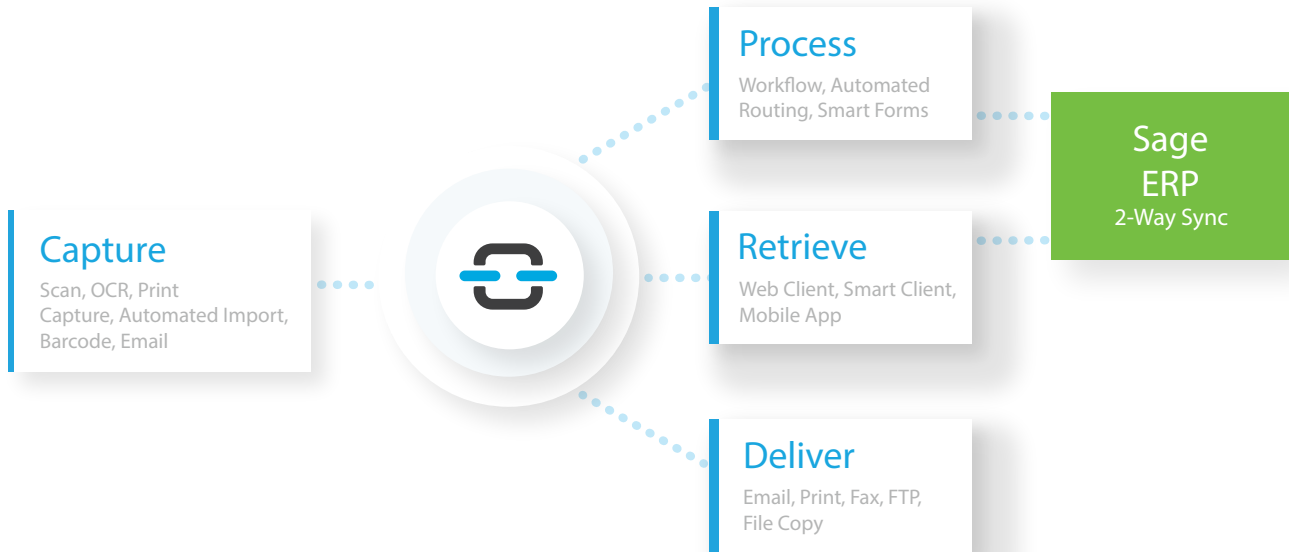
Workflow & Document Processing

Control information through the entire document lifecycle. Manage approvals and configure workflow processes based on your specific needs, providing increased visibility and control.

Automated Delivery

Schedule and automatically distribute documents with supporting documentation based on receiver (partners, employees, customers, vendors, etc.) preferences such as via email, fax, FTP, or print.

HOW DOES DOCLINK WORK?

Process
Workflow, Automated Routing, Smart Forms

Sage ERP
2-Way Sync

Capture
Scan, OCR, Print Capture, Automated Import, Barcode, Email

Retrieve
Web Client, Smart Client, Mobile App

Deliver
Email, Print, Fax, FTP, File Copy

CAPTURE, PROCESS, RETRIEVE AND DELIVER DOCUMENTS AUTOMATICALLY AND SECURELY WITH A SOLUTION THAT PROVIDES YOU FLEXIBLE DEPLOYMENT OPTIONS

01 Digitally capture and index documents in all shapes and forms from anywhere

02 Speed documents through all your various business processes - using a powerful and configurable workflow engine - including moving documents into the ERP

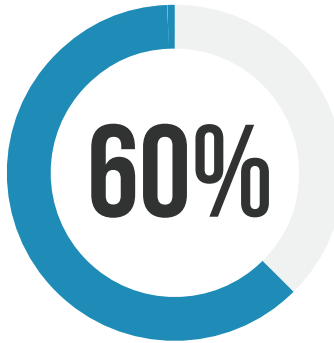**03** Search and retrieve easily via the web, mobile, or from within the ERP

04 Deliver documents out based on how your customer, vendor, partner, or printer wants to receive them

DEPARTMENT PROBLEMS WE SOLVE
ACCOUNTS PAYABLE

DocLink brings greater financial control to managing payables processing from receipt of vendor invoices to payment. You can leverage your existing Sage ERP data to automatically and accurately index documents. You can also view documents next to their captured details and minimize tedious data entry. Match purchase orders, receivers, and vendor invoices easily for quick reconciliation and resolution.

60%

AVERAGE REDUCTION IN PROCESSING COSTS

☑ **SELF-SERVICE DOCUMENT ACCESS**

Assign security permissions so employees only have access to specific documents. Searchable via desktop and mobile, these documents will no longer be lost in filing cabinets or offsite storage.

☑ **STREAMLINED APPROVAL FOR TIMELY DELIVERY**

Eliminate delays and late penalties by allowing approvers to respond in-office or remotely. Approvers can approve, deny, and add notes to invoices; enter approved GL account codes with ease; and view all supporting documents.

☑ **ELIMINATE FILING & MINIMIZE DATA ENTRY**

Regardless of how a solution gets into your business, safely capture and index its data automatically. Our solutions get that information through email, fax, scan, barcode, and optical character recognition (OCR).

DOCLINK CAN AUTOMATE EVERYTHING IN AP INCLUDING:

Invoice Processing

Audit Preparation

Credit Card Reconciliation

Expense Report Processing

DEPARTMENT PROBLEMS WE SOLVE
BEYOND AP

SALES ORDER PROCESSING

DocLink brings greater control and visibility to the sales department from the initial receipt of a customer purchase order to the signed proof of delivery. Automated workflows can be designed to speed the process of receiving and processing orders.

✓ **EASY ACCESS FOR BEST CUSTOMER SERVICE**
The ability to serve customers is greatly enhanced by having all documents (POs, quotes, etc.) available in one place. The customer experience is improved through quick response time and accurate documentation.

✓ **REDUCED CYCLE TIMES**
If approval is required, these documents can be routed through workflow for electronic approvals. DocLink also automatically links related documents, eliminating the need to print, copy, distribute, and file paper.
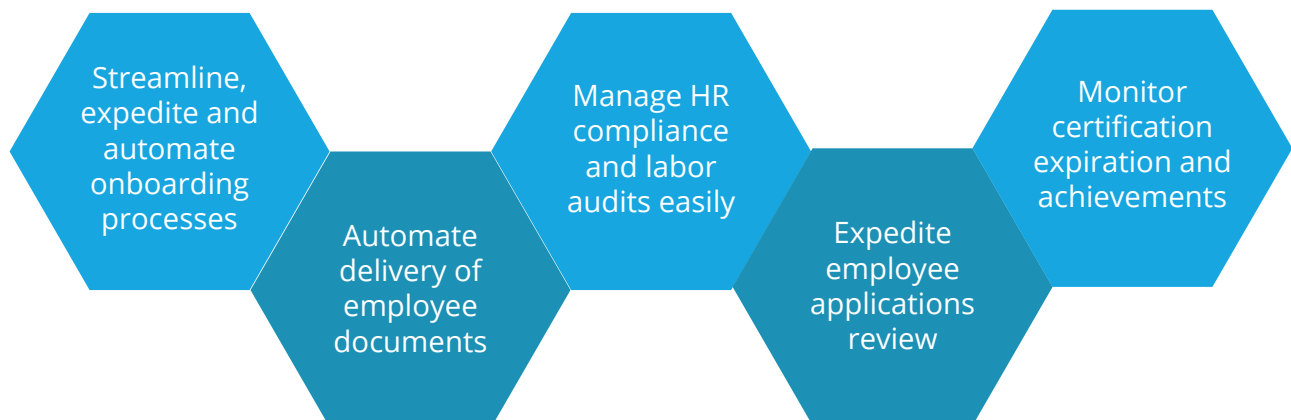
✓ **SEAMLESS ERP INTEGRATION**
All documents are seamlessly captured as they are entered into or generated by ERP software, and indexed and stored in DocLink with the transaction's data. View documents side-by-side as you work.

HUMAN RESOURCES

HR has traditionally been a department mired in paper, managing resumes, applications, benefit forms, W4's, I9's, employee reviews, and payroll stubs,. DocLink can bring greater control, visibility and security of employee documents to HR, securely storing personnel files and managing employee processes from hire to departure.

Streamline, expedite and automate onboarding processes

Automate delivery of employee documents

Manage HR compliance and labor audits easily

Expedite employee applications review

Monitor certification expiration and achievements

DEPARTMENT PROBLEMS WE SOLVE
BEYOND AP

ACCOUNTS RECEIVABLE

Personalize and automate comprehensive document delivery

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

FIELD SERVICE

Bring flexibility and accessibility to your staff no matter where they are

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

FACILITIES MANAGEMENT

Centralize document information and improve communication across multiple facilities with ease

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

CONTRACT MANAGEMENT

Improve visibility, compliance and collaboration by managing the entire contract lifecycle

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

INDUSTRIES WE CAN HELP

Construction	Hospitality	Services
Distribution	Information Technology	Transportation/Railroad
Education	Insurance	Utilities
Finance	Legal	And more...
Food & Beverage	Manufacturing	
Government	Non-Profit	
Healthcare/Medical	Property Management	

CUSTOMER SUCCESSES

SMART CITY

$18,000+

ANNUAL OFFSITE STORAGE SAVINGS

Reduced time to process invoice data by 90%

Learn more

"What used to take several hours to an entire day to search through paper files can now be done in as little as 30 minutes."

- Sujei Llanos, AP Supervisor

PINSLY RAILROAD

100%

PAPER ELIMINATED

Up to 80% less time to process invoices

Learn more

"DocLink is a worthwhile investment for any company. It allows you to have all the data you need at your fingertips."

- Jonathon Deich, Staff Accountant

Interested in reading more DocLink Customer Success stories? Visit our website

WHY CHOOSE DOCLINK

At Altec, we focus on delivering the best solution we can so you can run your business better. We're not just about getting the solution into your hands – it's about being your partner every step of the way for years to come.

WORLD-CLASS PRODUCTS

World-class products with seamless and deep integration, Smart Form capabilities for unique processes, mobile access, document capture flexibility, and configurable automated delivery

RAPID IMPLEMENTATIONS

Rapid implementations with a rapid time to benefit as we deliver on-time, on-budget through a proven methodology with a team of knowledgeable and helpful experts

OUTSTANDING CUSTOMER SUPPORT

Outstanding customer support on a 24/7/365 basis; our team is not only able to help with support tickets and software issues but also conducts in-person training classes and monthly educational webinars

DocLink has made our lives more manageable, efficient and accessible."

JONATHON DEICH
Pinsly Railroad

CHECK OUT OUR ONLINE RESOURCES FOR MORE INFORMATION

DocLink Information
Case Studies
YouTube Channel
Blogs

DocLink