

V1 Document Management

EDM FOR SAGE X3 BY V1 ELECTRONIC DOCUMENT MANAGEMENT

A comprehensive EDM solution available both inside and outside of Sage X3

As well as the costs of generating, handling, transporting and storing paper documents, we have the inconvenience and risks of storing valuable business data on paper.

The EDM solution for Sage X3 is a practical and efficient way to deal with paper where we need to and eliminate it wherever possible. The EDM solution comprises of a range of modules not only for storing documents electronically but also for generating and delivering documents electronically and for capturing email and paper documents and managing the long-term storage of records and meeting the requirements of GDPR. It is a comprehensive EDM solution, integrated tightly into the core of Sage X3, and also available to 'external users' for use outside of the Sage environment.

How EDM for Sage X3 by V1 addresses the challenges.

- ▶ **Productivity**
 - Save time on filing and photocopying; printing and envelope-stuffing
 - Make documents instantly available to staff throughout the office, throughout the company, throughout the world
- ▶ **Cost Savings**
 - Reduce postage, courier and fax costs
 - Use less stationery
 - Eliminate external document storage
- ▶ **Compliance**
 - Archive electronic and paper documents securely and cost-effectively
 - Satisfy auditors and tax authorities
 - Manage GDPR requirements
- ▶ **Business Continuity**
 - Eliminate the risk to vital documents
 - Keep important records in a secure repository rather than on workstation hard drives and email In Boxes
- ▶ **Green Agenda**
 - Use less paper, fewer photocopies, and more efficient document delivery
- ▶ **Manage legacy documents**
 - Integrate external documents
 - Simplify data take-on from legacy systems

Benefits

- ▶ Reduces the time filing and retrieving documents
- ▶ Makes staff more productive
- ▶ Reduces storage requirements for paper-based records
- ▶ Eliminates printing and postage costs
- ▶ Reduces environmental impact
- ▶ Maximise data

EDM for Sage X3 by V1 functionality.

▶ Automated Document Archiving

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

▶ More Secure Attachments

So that documents are securely archived and available to all users. Documents archived in the repository cannot be overwritten or accidentally deleted. New versions are automatically given a new revision number. Any type of file can potentially be stored in the EDM Solution, but the administrator can restrict this facility to common formats, such as Microsoft Office documents. The EDM buttons against a business partner can be used for contracts, product literature, credit reports, price lists and miscellaneous documents. Whereas documents supporting an individual transaction such as invoices, proofs of delivery and certificates will normally be attached to the specific transaction or order.

▶ Automated documents by email or fax and remove the last sentence that refers to faxing

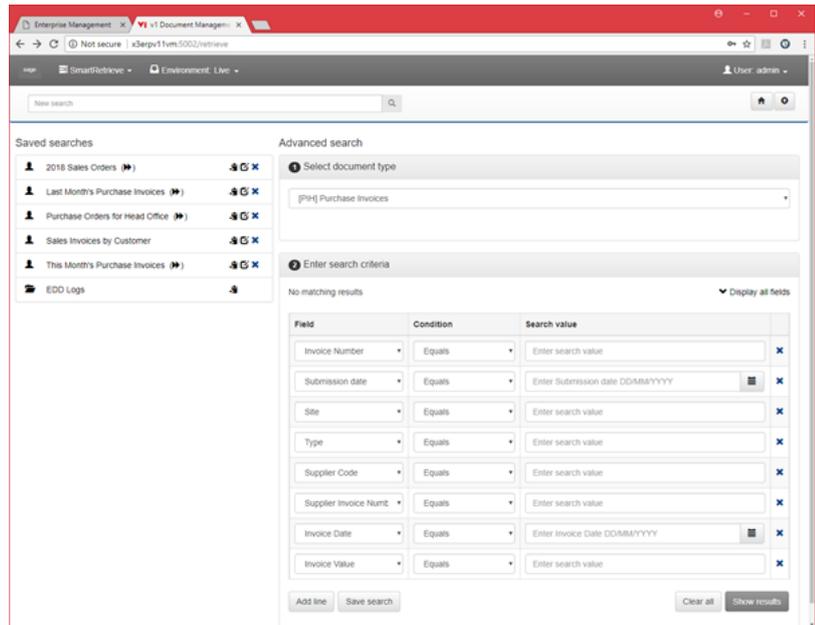
Outbound documents and reports generated through Crystal Reports can be emailed or printed at the same time as being archived. An entire 'print run' of documents such as invoices, statements or remittances can be processed together with each document being sent to the relevant email address or printer automatically. Email addresses can be looked up automatically from the Sage 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 X3 via new buttons on key screens or through the V1 Smart portal. Documents archived outside of Sage X3, i.e. through the V1 Scanstation, the V1 Smart portal or other Sage products such as CRM, are linked intelligently to Sage X3 business documents.

▶ Records Management and GDPR compliance

The optional V1 SmartRetentions module allows the administrator to manage retention policies for each document type and to automate the removal of documents no longer required. A supervisor can be given permission to remove certain documents that may contain personal details in order to comply with GDPR. The optional Full Text Search capability can help find specific names across all document types.



Sage X3 EDM Options.

▶ Scan Station

Batch Scanning and Automated Indexing

Adding a scan station to the 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 X3 Database. Transactional documents, such as orders, invoices, proofs of delivery, etc... can be separated and indexed automatically using barcodes. The EDM Solution enables Sage X3 to print barcode labels as transactions are entered to make archiving paper records as painless as possible. The transaction reference contained in the barcode label allows the EDM Solution to associate the paperwork with the transaction – and where appropriate with the business partner too – for fast retrieval later.

▶ V1 Smart Portal

Outside of Sage X3, documents can be accessed from the V1 Smart portal. Access levels can be defined to give 'external users' access only to selected sections of the document repository.

V1 SmartRetrieve allows external users to do quick searches across all sections they have access to from any browser. They can also perform advanced searches for specific metadata on specific document types and save their searches to be re-run at any time even from a Smartphone or tablet. Now everyone across the organisation can view the documents they need - instantly.

V1 SmartDeposit allows files to be dropped into the system and stored in the relevant section in the archive. The relevant business partner or product can be looked up using a live link to the Sage X3 Database. Additional metadata can be keyed in or populated automatically from the database.



Get in touch about how V1 can benefit your business:

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