

# GO PAPERLESS WITH DOCLINK



## ANY DOCUMENT, ANY PROCESS, ANYWHERE

### GO PAPERLESS WITH DOCLINK AND GAIN BACK PRODUCTIVITY

Are you looking to eliminate silos of business data? Increase workflow efficiency? Improve visibility, security, and compliance? Maximize profits? Let us help you manage your document lifecycle from start to finish with DocLink.



#### DOCUMENT CAPTURE

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



#### WORKFLOW & DOCUMENT PROCESSING

Control information through the entire document lifecycle. Manage approvals and configure workflow processes based on your specific needs.



#### SMART FORMS

Personalize unique processes and data needs with sophisticated windows you configure to streamline creation and indexing of documents and business processes.



#### DOCUMENT MANAGEMENT

Track and access documents wherever they are. Manage data better with an effective and holistic management solution that works with you every step of the way.



#### MOBILE ACCESS

Allow your team to securely access, approve, and capture documents instantly on their mobile devices. Searching for documents on a phone or tablet has never been easier.



#### AUTOMATED DELIVERY

Schedule and automatically distribute documents with supporting documentation based on receiver preferences such as via email, fax, FTP, or print.

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



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# ACCOUNTS PAYABLE

Leverage existing data in your ERP software to automatically and accurately index documents. View documents next to their captured details and stop spending time on tedious data entry.



## 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.



## TIMELY APPROVALS

Eliminate approval delays and late penalties. Approvers can respond through the DocLink client, email, and even mobile devices. Reminders are sent automatically for overdue items.



## ELIMINATE FILING & MINIMIZE DATA ENTRY

Regardless of how a document comes 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).

**“We can now process an ever-increasing volume of invoices and payments without hiring another accounting clerk, saving us \$40,000 annually.”**

DocLink brings greater financial control to managing payables processing from receipt of vendor invoices to payment. Users can match purchase orders, receivers, and vendor invoices directly from the desktop for quick reconciliation and resolution.

## STREAMLINED APPROVALS

Approvers can approve, deny, and add notes to invoices; enter and approve GL account codes with ease; and view all supporting documents from anywhere.

## AUTOMATED PROCESSING REDUCES HUMAN ERROR

- >> Receive supplier invoices in any form
- >> Assign to AP processor queue
- >> Electronically authorize invoices
- >> Approve and code invoices appropriately
- >> Automatically index and electronically file invoices
- >> Review for payment from the desktop or mobile



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# 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.



## 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.

**"We're not waiting for the paper to come up here; it's already in DocLink. We already see it, and you do not have to chase down paper. Everything is at your fingertips."**

## DOCUMENT TYPE EXAMPLES

Proposals  
Customer POs  
Sales Orders  
Acknowledgements  
Shipping Documents  
AR Invoices & Receipts

## AUTOMATION EXAMPLE: SALES ORDER ENTRY

- >> Receive customer PO via fax, email, or mail
- >> Enter the order into your ERP while viewing in DocLink
- >> Index PO automatically with all associated details
- >> Archive PO permanently in DocLink for easy access
- >> Push through easy approval process as needed
- >> Deliver documents however your customer wants them



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# SMART FORMS



Smart Form Toolkit allows you to configure personalized DocLink UI for collecting data used to process and approve your documents, quickly see related documents, and even generate new ones.



## DOCUMENT CREATION

Users can create documents that are indexed and submitted directly to the DocLink repository. The user can also browse related files and index them into DocLink at the same time.



## DOCUMENT PROCESSING

Users can enter information into a Smart Form to assist in the processing and/or indexing of a DocLink document. The user can also easily see a list of related documents.



## COMMON USE: NEW VENDOR REQUEST

When you need to have a new vendor setup in your ERP, use a Smart Form to generate the request which can be routed for approval and handling with related backup documents.

“DocLink has created some unexpected operational efficiencies and oversight for us. We’re able to break down and understand business processes that we’ve never had any visibility into before.”



## COMMON USE: CARD STATEMENTS

Import credit card CSV data and transform it into individual statements for each cardholder. Statements are immediately indexed and, after coding and approval, the transaction data can be imported directly into the ERP.



## COMMON USE: HR ONBOARDING

The onboarding process has many steps and associated documents. Use a Smart Form to enter and track data and to quickly view and capture additional documentation for employee files.



## COMMON USE: EXPENSE REPORT

Capture receipts and use a Smart Form to create an expense report. Immediately capture it into DocLink and, after coding and approval, import its data directly into the ERP, eliminating errors and duplicated data entry.

# DocLink MOBILE



With DocLink Mobile, your team can access, approve, and capture documents no matter where they are. Grant them the opportunity to be effective and efficient from any site or office.



## ACCESS TO DETAILS YOU NEED ANYWHERE

Not only will you have access anywhere but you also have options to work on the device that is most convenient. Searching for documents on a phone or tablet has never been easier for your team.



## QUICK, REMOTE APPROVALS

Gone are the days of papers piling up in a traveling manager's inbox. Approvals can be done anywhere. Review supporting documents, apply notes, and send the document on to the next status.



## CAPTURE AND UPLOAD ON-THE-GO

Files and photos can be uploaded within seconds and be immediately available in DocLink – a great option for traveling staff or field services.

**“We’re not waiting for the paper to come up here; it’s already in DocLink. We already see it, and you do not have to chase down paper. Everything is at your fingertips.”**

DocLink Mobile makes basic tasks on phones and tablets easy. If you know how to use DocLink, you can use DocLink Mobile. The native apps are built to utilize the best features of both the iOS and Android platforms and are free to install from the Apple App Store and Google Play.



## FUNCTIONAL DOCLINK MOBILE CAPABILITIES

- >> Photograph receipts for future expense reporting
- >> Capture details of damage/issues during site visits
- >> Access invoices for remote approval
- >> View work orders to confirm job details
- >> Send documents to the next workflow status
- >> Upload documents into the DocLink repository

# DocLink

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