

DocStar ECM AP Automation



Product

DocStar® ECM AP Automation

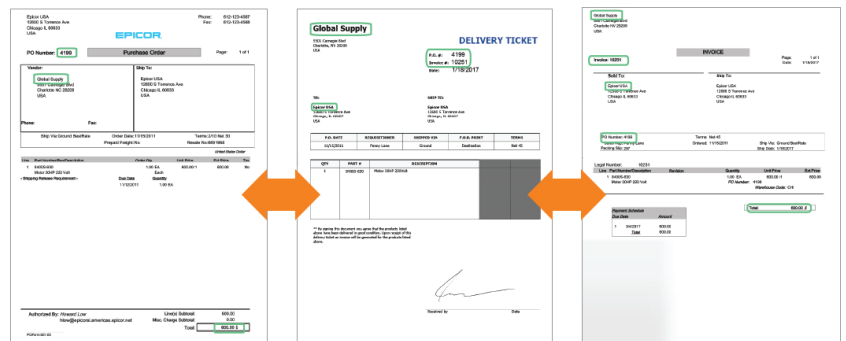
Benefits

- ▶ Increase productivity
- ▶ Reduce or eliminate late payments
- ▶ Invoice approval anytime, anywhere
- ▶ Improve vendor setup and management
- ▶ Enhance visibility and control of the AP process
- ▶ Focus your team on higher value goals

Capture, Route, Approve, Integrate

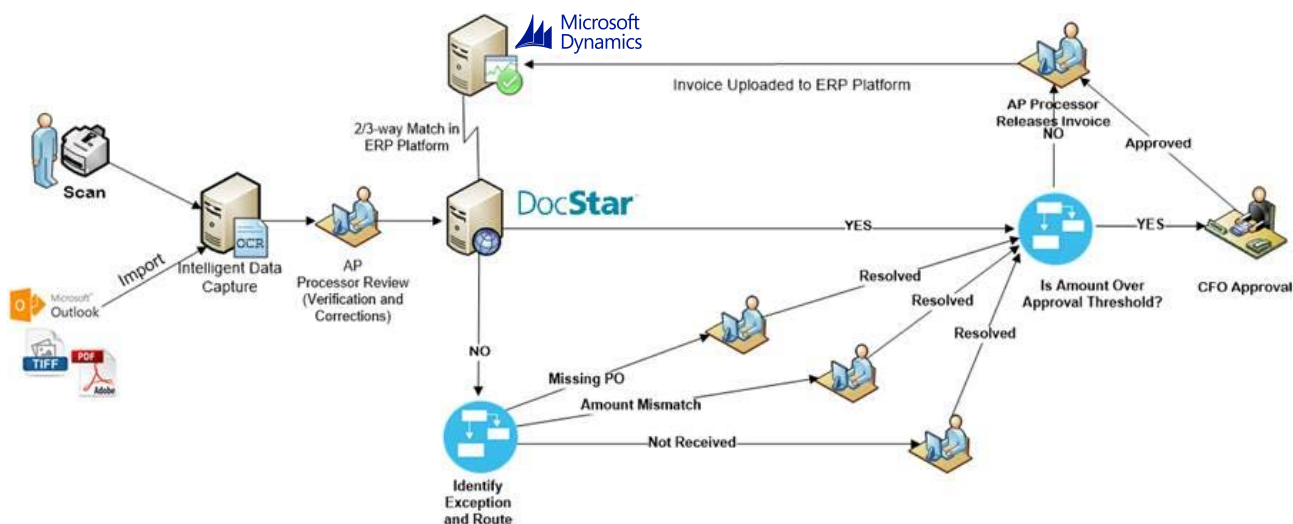
Remember when you had a pager vs. your current Smart phone? You'll think the same way about your current AP process once you've switched from paper to DocStar ECM AP Automation. You won't believe the transformation.

Is your AP team spending countless hours performing routine tasks to simply enter and process your AP invoices? Your Accounts Payable process will be dramatically improved with DocStarECM. You'll quickly switch to a whole new way of automatically and securely capturing, indexing, routing, approving, and integrating AP invoices with your Microsoft Dynamics® GP system. Empower your team to focus on higher value goals by reducing your procure-to-pay processing time with DocStarECM.



Three-way match

DocStar ECM captures and automatically processes your AP invoices from multiple inbound sources, including existing document scanners or multi-function copiers. Invoices are automatically routed for two-way and three-way matching workflows and approvals.



Intelligent data capture

Instantly recognize and extract key information from inbound vendor invoices. Using industry leading OCR technology, combined with highly sophisticated processing algorithms, DocStar AP Automation achieves the highest possible levels of automation accuracy.

- ▶ Automatically capture and process vendor invoices
- ▶ Improve accuracy with automated data matching
- ▶ Speed procure-to-pay processing time

Advanced workflow

At its core the DocStar AP Automation solution benefits from one of the most powerful workflow engines available balanced with an easy to use graphical workflow designer.

All of this technology results in a highly intuitive solution for your team. We've done the hard work, so you don't have to.

- ▶ Automatically perform two- or three-way matching
- ▶ Easily approve AP Invoices anytime, anywhere
- ▶ Integrate with your Microsoft Dynamics GP system

Ensure compliance

Let DocStar help ease the burden of regulatory compliance and retention requirements. Consistent and secure, DocStar AP Automation ensures that your organization is following the recommended procedures you've established.

- ▶ Ensure records retention compliance
- ▶ Monitor document access and activity with audit trails
- ▶ Guarantee file integrity with DocStar® ValiDate, which time and date stamps every image
- ▶ Electronic document storage ensures safety and security of all files in the event of a disaster
- ▶ Gain greater business insight with full reporting tools

Improve Vendor Relations

Respond to vendor inquiries instantly rather than wasting time looking through file cabinets. Vendor relations will improve and staff will be able to focus on more important tasks.

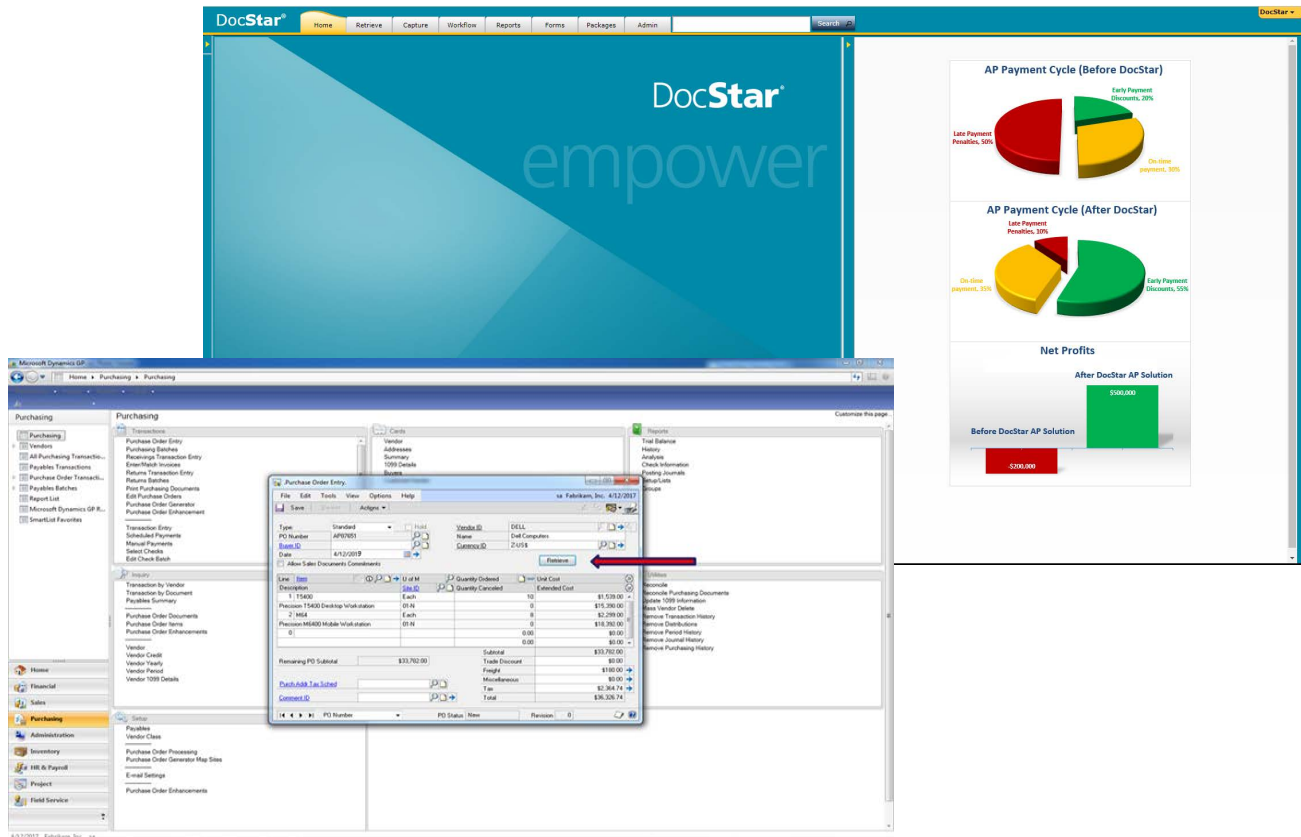
- ▶ Instantly find any invoice and its supporting documentation
- ▶ Quickly email documents to vendors while still on the phone
- ▶ Save on costs associated with paper access and distribution

Streamline AP invoice review

Easily receive and route invoices for approval by managers. Built-in alerts and integrated ECM allows filing and retrieval of documents right from within Dynamics GP. E-mail alerts combined with one-click approval stamps streamline the entire process.

Microsoft Dynamics GP integration

Integrated ECM allows filing and retrieval of documents right from within Microsoft Dynamics GP.



About DocStar

DocStar is a browser-based enterprise content management and process automation platform that enables global digital transformation. Easy to implement and use—both in the cloud and on premises—DocStar offers proven technology and global process expertise to empower organizations to work smarter, reduce costs and invest in growth. DocStar is an Epicor solution.



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DocStar® ECM Sales Order Automation



Product

DocStar® ECM
Sales Order Automation

Benefits

- ▶ Reduce overall costs
- ▶ Improve transaction efficiency
- ▶ Achieve measurable efficiencies
- ▶ Enhance accountability
- ▶ Accelerate business processes
- ▶ Improve fulfillment speed
- ▶ Eliminate transposition errors
- ▶ Avoid losing or misplacing orders

Key Features

- ▶ Intelligent data collection and data mapping
- ▶ Workflow for order handling, validation, and issue resolution
- ▶ Integration with ERP
- ▶ Customer credit hold checking
- ▶ Duplicate sales order checking
- ▶ Part number /item validation
- ▶ Secure storage for permanent archiving
- ▶ Documents screen to indicate what is supposed to happen to the document
- ▶ Demand screen that is designed for order entry
- ▶ Drag and drop attachments to emails that will get “scanned” into the system through an OCR application

Adding value to your business, productivity to your process, and profit to your bottom line

Faster. Smarter. Cheaper. Business today is more competitive than ever. Does your business have the tools to keep up?

Sales order entry is part of nearly all manufacturing operations, setting the tone if not the speed for the entire process. Too often, sales order entry is done manually, which is labor-intensive and time-consuming, not to mention expensive—costing between \$24–41 USD¹, depending on the complexity of the order. Differences in the way orders are received—whether via mail, faxes, or email; as paper, Adobe® PDFs, Microsoft® Excel® or Microsoft® Word® documents; or other electronic files— adds to the confusion and creates opportunities for errors.

Since sales order entry is a critical part of the sales transaction, it makes sense to automate the process and eliminate many of the errors associated with manual sales order entry. DocStar ECM Sales Order Automation (SOA) takes the extra work and worry out of sales order entry.

Capture

DocStar ECM SOA uses Intelligent Data Capture (IDC) to automatically capture and extract sales order data such as customer, order date, and line items ordered. DocStar ECM SOA accepts and indexes sales orders, then moves the data on to the next step.

Validate

DocStar ECM SOA integrates with Microsoft® Dynamics GP for data lookup; confirms customer information, purchase orders, quotes, and validation such as credit check and part number verification; and detects missing, incomplete, or incorrect data. DocStar lets you identify exceptions and automatically route them to the person tasked with the resolving the issue.

Process

If all the conditions are met and there are no exceptions, the order is sent straight to Auto Allocation and fulfillment. For those orders with no exceptions, this is an easy way to accept, review, and initiate the orders—as quickly and efficiently as possible, but also with added human intervention as needed to facilitate and eventually finalize the sales cycle.

Scan Purchase Orders
Scanner/Multi-Function Copier



Intelligent Data
Capture (IDC)

ERP

Valid



Create Sales
Order in ERP

Recognize &
Index Sales
Order

Capture Purchase
Orders Electronically

Microsoft
Outlook

TIFF PDF

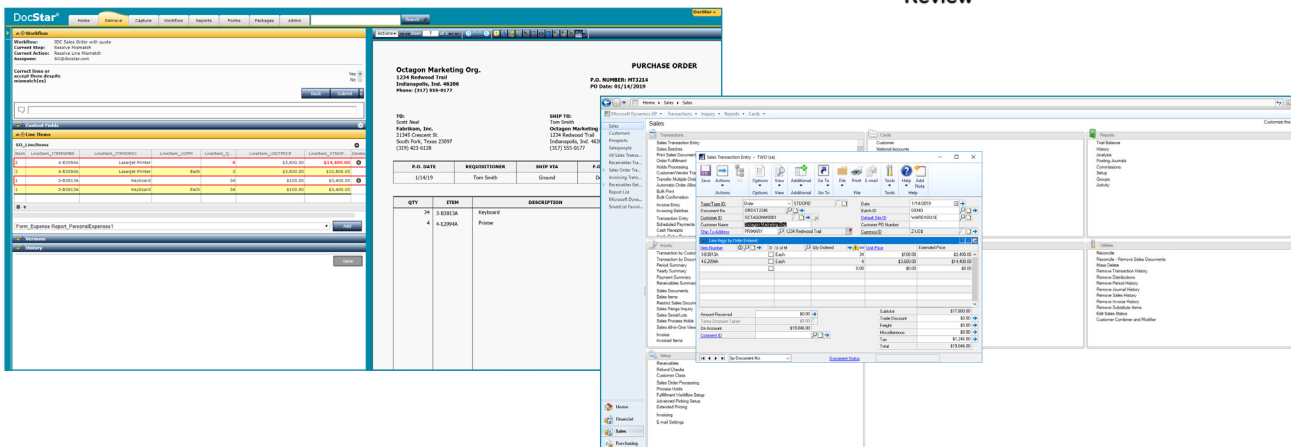
Adobe

Validate Sales
Order (valid
customer, part
number, etc)

Exception or
Review required



Correct
Exception or
Review



Ensuring that the sales order information data is accurately entered into your system has traditionally been time-consuming, labor-intensive, and prone to error. Automating this process with DocStar ECM Sales Order Automation ensures accurate data is automatically entered into your system's process—improving

transaction efficiency and reducing fulfillment time. In other words, it can save you time and money. DocStar accepts, reviews, and initiates customer orders more quickly—verifying POs, quotes, and parts availability to speed up the fulfillment process and improve customer service.

1 According to a study by American Productivity and Quality Center, the average company spends \$24.21 to \$40.87 to process a sales order. <https://www.apqc.org/knowledge-base/documents/cutting-costs-sales-order-processing>

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Product

DocStar IDC

Benefits

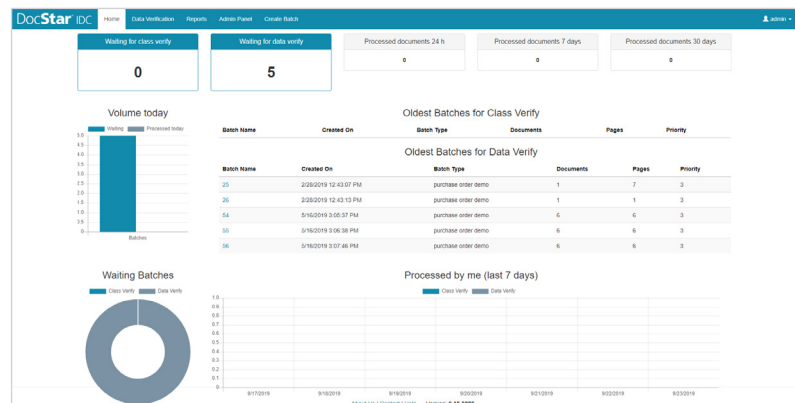
- ▶ Immediate document capture - any format, anywhere
- ▶ Extract key data fields
- ▶ Reduce manual data entry

Intelligent Data Capture

On-Premises or in the Cloud

DocStar IDC (Intelligent Data Capture) eliminates labor-intensive, error-prone and time-consuming manual document processing. Easy to use and configure, DocStar IDC is integrated with DocStar ECM to simplify data capture for content management and business process automation.

- ▶ **Capture documents as they arrive** - From any scanner, MFD, email, or watched folder
- ▶ **Document classification** - Automatically sort by utilizing neural networks based on pattern, appearance, and text into specific document classes for data extraction
- ▶ **Reduce manual data entry** - 60% to 90% by automatically extracting relevant data fields based on document type whether machine printed, hand printed, barcode, or mark sense
- ▶ **Electronically route documents** - Easily automate workflows with data-driven business processing
- ▶ **Simple implementation** - Our unique Auto-Find learns data fields on documents without endless hours of building templates, our custom machine-learning algorithms allows for fast setup of previously unseen documents
- ▶ **Visibility** - Reports display documents queued for processing
- ▶ **Compliance controls** - Apply strict processing and retention controls for regulatory compliance



Input

DocStar IDC provides multiple document import options: direct connect scanners, multi-function devices both local and remote, watched network folders, and automatic email support.

Classify

Patented document classification engine utilizing neural networks and artificial intelligence will automatically classify and separate your documents from supporting documents eliminating the manual separation of these documents.

Capture

DocStar IDC automatically finds key data fields for defined document types and learns new formats for the same document types by using custom machine-learning algorithms or quick on-the-fly user-guided teaching without endless hours of building templates. This allows for fast setup of previously unseen document formats.

Validate

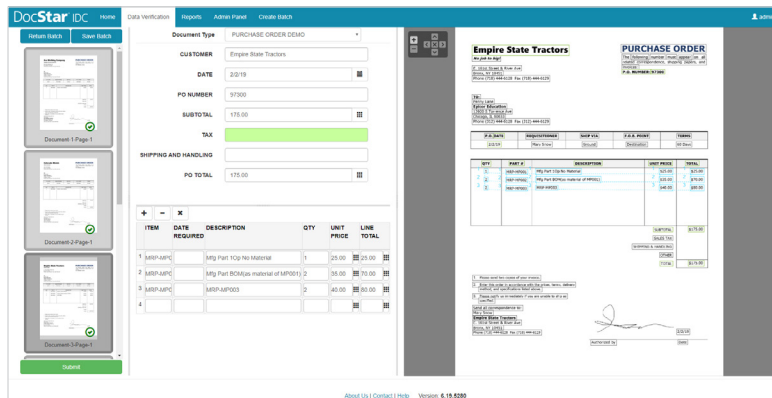
During capture and data extraction DocStar IDC applies data validation parameters. Extracted data fields can be passed to a database for automatic validation. This ensures higher extraction accuracy.

Verify

During verification the operator can easily correct any exception fields that were not extracted properly. Exceptions can be caused by a poor quality scan, characters touching lines, marks on the document, etc. It is very simple for the operator, with minimal effort, to correct the exceptions, documents with no exceptions are never presented.

Submit

DocStar IDC submits processed documents to the appropriate DocStar business process automation (BPA) workflow.



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