

# DecLink for Acumatica



# WHAT WE DO

Altec is a leading provider of document management and process automation solution DocLink, which helps companies connect their people, processes and data. As an Acumatica Gold Certified solution, 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. Thousands of companies globally use DocLink on-premise, in the cloud or in hybrid environments.

## 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). This 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.

# DOCLINK SOLUTION

Seamless integration to your Acumatica 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.



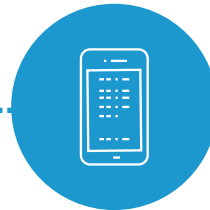
## Smart Forms

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

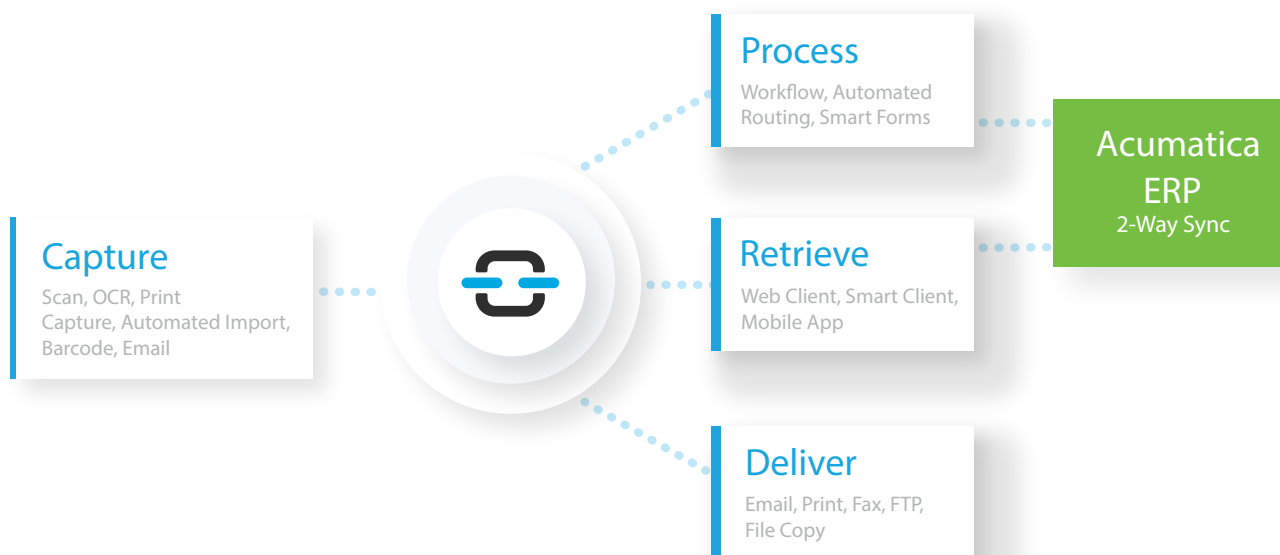
Control information through the entire document lifecycle. Manage approvals and configure workflow processes based on your specific needs, providing increased visibility and control.



## 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?



**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

# DEPLOYMENT OPTIONS

## YOU HAVE CHOICES WITH DOCLINK

Altec offers the flexibility you need now, and in the future, to keep your teams operational in any situation. Whether your organization is moving everything to the cloud, keeping everything on-premise, or a mix of both, DocLink has an option for you. Implementation and training can be completed either on-site or remotely.



### On-Premise

- Purchase DocLink with a perpetual license or with an annual subscription.
- Install DocLink on your own in-house servers.
- Your IT department has complete control over installation, maintenance and support.
- Easily integrate to other on-premise applications.



### Cloud

- DocLink Cloud is purchased as an annual or multi-year subscription. No up-front costs are required for hardware.
- DocLink is regularly updated as part of an active subscription with Altec, who manages the infrastructure and application.
- Your IT department no longer has to manage your software or servers.
- Utilize web services to integrate with other applications.



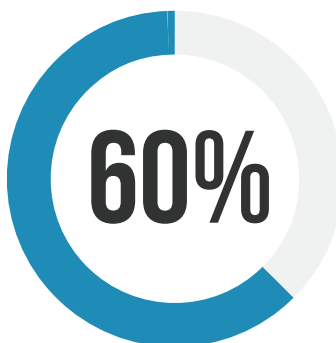
### Hybrid

- Purchase DocLink with a perpetual license or with an annual subscription.
- DocLink is installed and configured just like an on-premise deployment but the solution resides in a hosted data center or private cloud managed by your third-party hosting service or reseller.
- You manage DocLink and your hosting partner manages your infrastructure including software updates and patches.
- Utilize either web services or standard on-premise integration framework.

## 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 Acumatica 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.



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. 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.

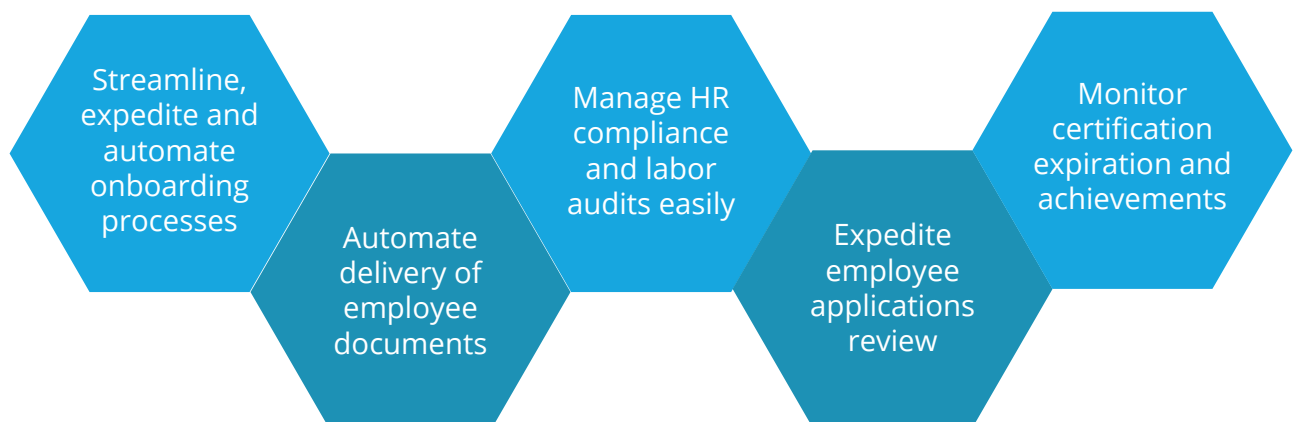


### SEAMLESS ERP INTEGRATION

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.





## 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

### 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

### 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

### 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  
Distribution  
Education  
Finance  
Food & Beverage  
Government  
Healthcare/Medical

Hospitality  
Information Technology  
Insurance  
Legal  
Manufacturing  
Non-Profit  
Property Management

Services  
Transportation/Railroad  
Utilities  
And more...

# CUSTOMER SUCCESS STORY

## ENGAGEMED ELIMINATES PAPER, REDUCES AP PROCESSING TIMES BY 75%

### COMPANY

EngageMED

### INDUSTRY

Healthcare Consulting

## BACKGROUND

EngageMED manages accounting for all its clinics, and their AP process was completely manual. Nothing was scanned or digitized, and filing was complicated. Document accessibility was limited, it took hours to find older documents, and they had to pay their storage company to retrieve requested files. Their biggest challenge was approvals – with no organized workflow, approvals could take 3 weeks.



Manual coding eliminated



Shorter, more efficient approval times

**75%**  
reduced AP processing time from days to hours



Paper files eliminated



No additional staff required with growth

**30**  
seconds for invoice retrieval reduced from 30 minutes



Documents accessible across all offices



More time for additional tasks i.e. bank reconciliations



Documents indexed, automatically linked



Stability during cloud ERP transition

**85%**  
reduced approval time from weeks to days/hours

# 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; The DocLink 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 allowed us to work smarter, not harder. It's been a big win for us."*

**TONY LE**  
Herman Goldner



## CHECK OUT OUR ONLINE RESOURCES FOR MORE INFORMATION

[DocLink Information](#)  
[Case Studies](#)  
[YouTube Channel](#)  
[Blogs](#)

**DocLink**