

Document Management Overview

Do you sometimes feel that you are being buried in paper? Computers were supposed to cut down on the amount of paper we use and store, not increase it. You have copies of Point of Sale transactions, customer statements, vendor packing lists, vendor invoices, vendor statements, and more that all need to be filed. And the time involved in filing these forms and in locating them if you need to review, make copies, fax or e-mail copies can be overwhelming.

Eagle offers a full Document Management suite to give you laser document printing and help you eliminate the need to keep paper by storing signatures and capturing and storing copies of receipts and invoices. You have the option to purchase the modules that make up the Full Document Management suite separately, if you don't need the full suite.

In this lesson, we'll explore the modules that make up the Document Management suite, including Advanced Laser Documents, Document Imaging, Document Scanning, and Delivery Confirmation.

The first module that we'll look at in the Document Management Suite is Advanced Laser Documents. With this module, you get full laser printing capability. This means that you can print your invoices and statements on plain paper rather than the more expensive, preprinted forms. Advanced Laser Documents enables your laser printer to print the complete form, including logo and lines, as well as the content of the invoices and statements. Of course, you can still use pre-printed forms if you prefer.

The Advanced Laser Documents also lets you print tiled copies of customer invoices with your statements on a laser printer, and print Accounts Payable checks on a laser printer using preprinted check forms.

Document Imaging is a powerful organizational tool, since it allows you to archive virtual documents and print them later if necessary. This module includes several components, some of which can be purchased separately.

The Electronic Signature Capture module requires one or more signature capture devices to be installed on the system. Signatures can then be captured on sale and credit transactions in both Point of Sale and Offline POS, whether you're working with credit card transactions or in-store charges. The signature then becomes a part of the transaction in the Document Imaging archive file. When you print collated invoices with your statements, captured signatures are included.

The Electronic Journal application contains virtual copies of receipts printed by your receipt printer. These receipts can be viewed by terminal number and date. Although the receipts are stored electronically, if you ever need a printed copy of the electronic receipts, you have the ability to print what's needed.

Document Imaging also provides storage of both Online and Offline Point of Sale transactions. These are stored on your Epicor Server in a receipt format and/or an invoice format. Printed Sales, Credits, Orders, Special Orders, Estimates, Inter-store Transfers, Layaways, and ROA payments on account are all stored in the Document Imaging Archive file.

These archived transactions can be viewed and reprinted from the Document Archive Viewer, which is easily opened from QuickRecall, Customer Maintenance, Purchasing and Receiving, and Business Advisor as well as the Eagle Browser.

The Document Scanning purchase option gives you the ability to scan paper documents or import electronic documents from your PC and link them to Eagle documents or inventory items.

Think about all the paper that collects in your office over the course of a week or month... wouldn't it be nice to scan that delivery ticket that had notes jotted down about the condition of the product along with a signature and link it to the original order? Anytime you needed to reference the order, the delivery notes would be available as well just by clicking your mouse.

Or maybe you'd like to link installation instructions to certain inventory items. Document Scanning allows you to do this easily.

Need more ideas? Accounts Receivable could scan a customer's check and link it to their account when payments are received. Then, if a question ever arises about the payment, you have the proof right there.

Just remember, you can use Document Scanning to actually scan hard copies of important documents or to import a file from another application, such as Word or Excel, to link to documents and inventory items.

Scanned and imported documents can be viewed, annotated, linked together, faxed, printed, and used to create PDF documents for e-mailing while they are in the Document Scanning Queue prior to being archived. If you use Enhanced Forms and print Epicor-generated barcodes on Point of Sale documents, the attributes can be assigned automatically.

When you are ready to archive the scanned or imported documents, you mark the documents, click Archive, and the documents are uploaded to the Eagle Server. These archived documents can be retrieved through the Document Archive Viewer and other Eagle applications such as Inventory, Customer Maintenance, and Purchasing and Receiving.

The last purchase option that we're going to look at in Document Management is Delivery Confirmation.

This module gives you the ability to capture a customer's signature on a hand-held PC (PDA), create/add notes, edit quantities on the order or invoice, and capture an image.

It's a simple, easy to use process. Prior to the delivery, the desired transactions, orders, or invoices are downloaded from your Eagle system to the PDA.

The delivery is made and a signature is captured if necessary.

Once the deliveries are complete, the signed transactions and any notes and images are uploaded from the PDA back to the Eagle server where they are stored. They can then be viewed from the Delivery Manifest. The signed Orders and Invoices can also be viewed in the Document Archive Viewer. Signed Invoices can also be viewed in QuickRecall.

I hope this quick overview of the Document Management Suite has captured your interest in learning more. Look for the individual modules on the applications discussed. It really does offer the opportunity to develop that "paperless" office we've all been dreaming of.

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