Sage Timberline Office

Document Management

Organize all important documents and files for fast, easy storage, retrieval, and routing. Document Management helps you eliminate the inefficiencies of managing excess files and paperwork.

Document Management is an electronic document classification, storage, retrieval and routing system developed to run directly from within Sage Timberline Office. With Document Management, you'll quickly experience increased efficiencies through improved storage and document access capabilities. As a result, you will be able to effectively put your hands on information in a matter of seconds rather than hours or days.

Utilizing a secure DocuVault database, you can capture, classify, and archive any document created by computer or scanner. Your ability to store these document images in a highly compressed, secure format allows you to begin freeing up needed space in your office by eliminating filing cabinets and boxes you currently use to store your company property or project-related documentation. In addition, its powerful search engine allows you to retrieve files by document types, classifications, user-defined keywords, or multiple keywords with lightening fast results.

Do you have documents that need to be routed for approval or require further instruction? No problem. With Document Management Rules-based Routing, you can ensure documents are reviewed by the right people in the right sequence every time. Should all reviewers receive a document simultaneously or should documents be sent to reviewers sequentially? Would you like to designate an alternate recipient if the original reviewer is unavailable? Who should be notified when a process is completed? These are just a few of the processes that Rules-based Routing can automate for you. By automating the routing and approval process, you can avoid unnecessary delays, mistakes and get paperwork approved faster.

And, because of tight integration, invoice approval as well as invoice classification and creation, can be performed from within Accounts Payable and/or Document Management addressing the concept of one-time entry of data.

A key feature of the Document Management application is its ability to integrate with other Sage Timberline Office applications. One of the benefits of this seamless integration is a convenient drop-down menu that allows you to organize your document with previously used data fields as you are classifying, routing, and approving current documents. You're able to view document images at the same time you're entering data into Sage Timberline Office so it's readily available.

With Document Management you can share, link, and view document images within other Sage Timberline Office applications. Now you can find the information you need when you need it. Accessing important company and project related data has never been so easy and efficient.

BENEFITS

- Experience increased efficiencies through improved document storage and access capabilities

- Quickly and easily access important company and project related information when you need it

- Secure documents while still providing easy access to those who need it

- Eliminate the time-consuming "hunt" for misplaced or misfiled documents

- Automate the routing and approval process that best fits your particular business needs

Document Management Capabilities

- Classify your documents by a number of fields such as job number, cost code, property, document type, user-defined custom field, or pre-defined classification, to expedite search and retrieval.

- Gain real time access to Sage Timberline Office data while classifying documents.

- Retrieve documents instantly with powerful, high-speed search capabilities.

- Automate the routing and approval process using a variety of user-defined criteria.

- Compress documents easily, to save even more space, with a highly sophisticated compression routine.

- Use electronic notes and stamps, similar to ink stamping on documents, improving document history and facilitating the routing/approval process.

- Ensure documents are routed and reviewed by the right people in the right sequence.

- Classify a collection of related documents for quick access to large groups of documents.

- Categorize groups of documents for quick CD burning or for internal and external distribution.

- Easily e-mail retrieved images as PDF Files.

- Get up and running quickly with the help of a simple, self-contained setup wizard.

- Integrate with e-mail applications to alert users of documents awaiting approval or review.

Now you can identify which recipients can approve, reject, or forward documents as well as a number of other conditions.
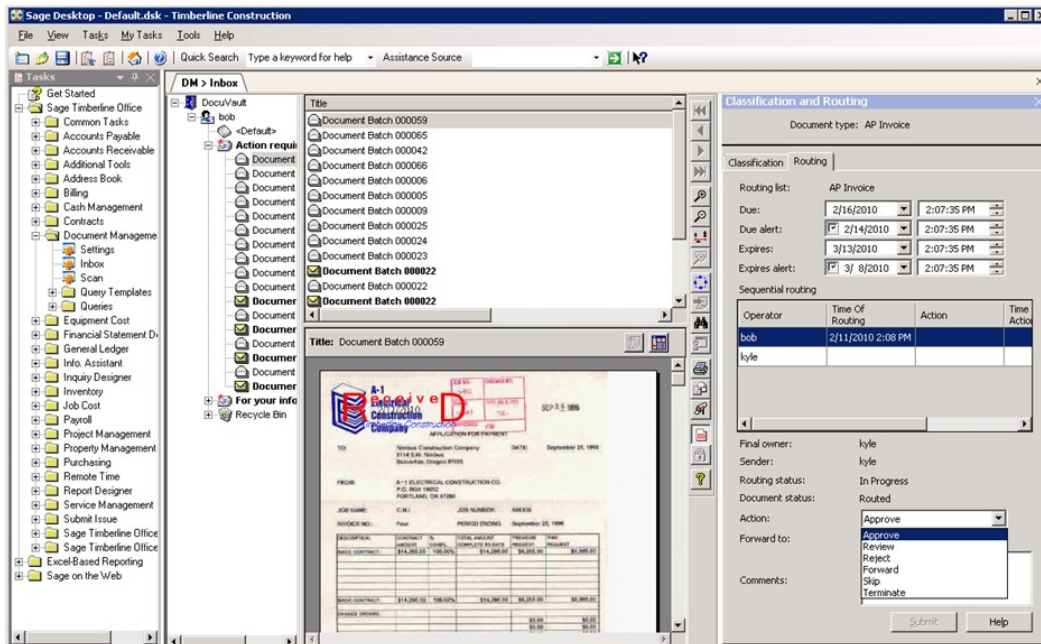
Document Management is part of the Sage Construction and Real Estate family of fully integrated software created to streamline work and connect the people you depend on to build your business.

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