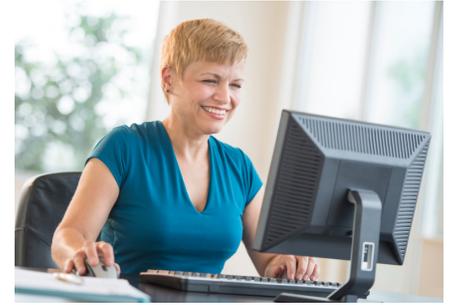


## Document Management



Organize all important documents and files for fast, easy storage, retrieval, and routing. Sage 300 Construction and Real Estate (formerly Sage Timberline Office) 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 300. 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, and 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 Sage 300 Construction and Real Estate 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 300 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 300 so it's readily available.

With Document Management you can share, link, and view document images within other Sage 300 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 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.

# Sage 300 Construction and Real Estate

---

## 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 predefined classification, to expedite search and retrieval.
- Gain real-time access to Sage 300 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 email retrieved images as PDFs.
- Get up and running quickly with the help of a simple, self-contained setup wizard.
- Integrate with email applications to alert users of documents awaiting approval or review. Quickly access Workflow Centers from the Desktop.
- Optimize your productivity by accessing tasks you perform most often in an intuitive workflow layout.
- Instantly view commonly used reports and inquiries.
- Easily reconcile General Ledger and subledgers.
- Quickly access assistance topics with a click of the mouse.

For more information, contact your Sage business partner or customer account manager at 800-858-7095.

## About The Sage Group, plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has millions of customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

For more information about Sage in North America, please visit the company website at [Sage.com](http://Sage.com). Follow Sage North America on Facebook, [Facebook.com/Sage](https://www.facebook.com/Sage), and Twitter, [Twitter.com/SageNAmerica](https://twitter.com/SageNAmerica).

---

For more info, visit: [SageCRE.com](http://SageCRE.com)  
or contact us at 800-858-7095