Document Management

For over a decade, companies have been told to strive for a paperless environment. Until recently, efforts have been largely ineffective or impractical. Carillon ERP's integration with KwikTag® is so harmonious that Carillon clients are finally turning that fantasy into a reality. Carillon ERP, with document management powered by KwikTag, is the electronic solution to capture, store, search, retrieve and distribute data. KwikTag is seamlessly integrated into the Carillon ERP system so that you can instantly see all the documents associated with a particular order, vendor, customer, journal entry, etc.

Part of the reason that Carillon's Document Imaging is so successful is because of the way the interface has been built. KwikTag's patented barcoding capabilities allow documents to be scanned either before or after the document has been entered into Carillon. Once scanned, you can then retrieve the document through Carillon by clicking a "Launch" button. You can also retrieve the document through KwikTag's powerful search engine, which allows you to search based on any word contained in the document.

Document Management Capabilities

- Vendors can email their invoices directly into KwikTag, where they are available to AP clerks for voucher entries.
- Remote locations/branches can email or scan documents directly into KwikTag, where they are available to any Carillon user (with the appropriate permissions) to attach to a transaction or master file.
- Mail room staff can scan documents directly into KwikTag, making them available to Carillon ERP users who attach them to Carillon transactions or master files.
- Carillon ERP users can enter documents into Carillon, which creates a reservation for the document in KwikTag. The documents can then be bulk scanned into Kwiktag whenever convenient.

We have built document management capabilities throughout the entire Carillon ERP system. You can now have your documents safely stored and accessible instantaneously from nearly anywhere in the world!

Document Management Process

01 CAPTURE	02 STORE	03 SEARCH & RETRIEVE	04 DISTRIBUTE
• *How:* Scan, fax, email, print, XML import, OCR, barcode • *What:* Invoices, sales orders, contracts, receipts, employee information, etc.	Available to anyone on the network with appropriate security permissions	OCR enables search for any word in any document in the system	Easily send documents to email, fax, or printer

Benefits of Carillon ERP with Fully Integrated Document Management

Secure documents from physical damage, tampering, and theft

Once scanned into KwikTag, documents are only available to users who have the appropriate security permissions. Cloud backups ensure that they are safe from fire, flood or any other kind of tampering or physical damage.

Save money on paper, printing, shipping, and storage

The average office worker uses nearly 10,000 sheets of paper annually. Imagine the money you could save when you eliminate the need for a filing cabinet and transfer all your documents to KwikTag!

Improve customer and supplier relationships

Get your invoices, quotes, purchase orders and more out sooner with Carillon's mail, email and faxing capabilities.

Documents are accessed under the Images tag in a variety of Carillon windows, including:

Journal Entry | Sales Entry | Payables
Voucher Entry by Amount | Voucher Entry by Item
Convert P.O. to Voucher | Online Invoicing
Invoice Entry by Amount | Invoice Entry by Item
AP Credit & Debit Memo | AR Credit & Debit Memo
Vendor Maintenance | Customer Maintenance
Contact Maintenance | Employee Maintenance

Increase collaboration and efficiency throughout your entire organization

- **Accounting and Finance** – Electronically store and share invoices, statements, vendor contracts and more for faster review and approval.
- **Contracts and Administration** – Store customer and job-related contracts, change orders and credit applications for quick and easy access.
- **Human Resources and Payroll** – Securely store important employee information, such as I-9 and tax forms, employee reviews, receipts, passports and other sensitive information.
- **Customer Service** – Customer Service Representatives have easy access to all necessary documents, helping them resolve issues quickly. They can also find, fax, print and email documents right from their workstations.
- **Sales** – Process orders more efficiently and capture all documents related to a transaction while you're on the phone. They will all be readily available so you can close the deal.

Stop wasting time searching for documents

Enter a document into Carillon ERP while looking at the scanned image in KwikTag. Anyone with permission can then search for and launch the document directly from either system. Finding the right document is easy, as KwikTag can search based on any word contained in the document. All documents stored in KwikTag's online database can be viewed, edited and distributed by any user with appropriate security permissions.

Reduce time spent rekeying information

When document information (i.e. a vendor invoice) is entered into Carillon, a reservation for the document is automatically created in KwikTag. Furthermore, Carillon automatically populates KwikTag with metadata from the document (i.e. type of document, invoice number, invoice data, company ID, customer ID, etc.)

Direct support and simple upgrading

Carillon ERP maintains the document management interface, so you'll never have any issues upgrading to new versions. This also means that your Carillon support team is experienced with KwikTag and how your organization uses it, so they can provide you with the best support.

You will be amazed by how efficient your office can become with a document management system that is fully integrated with your ERP system. After many decades of talk, the paperless office is finally becoming a reality.

1.800.739.9933 | www.CarillonERP.com | Sales@CarillonERP.com

CARILLON® ERP