



## 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 and 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 lightning fast results.

Scan and classify documents using an unlimited number of document types such as job number or property, then route to the appropriate department and/or reviewer, or save for future distribution. Once it has been distributed, an automated e-mail notification is sent to the reviewers' e-mail inbox, alerting them of the pending document.

Do you have documents that need to be routed for approval or require further instruction? No problem. With Document Management you can apply an electronic approval stamp prior to routing the document. Easily annotate documents by applying sticky notes. This allows you to highlight specific areas within the scanned document and add questions and/or instructions to further streamline your document routing, collaboration, and approval process.

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.

### 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.
- 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.
- 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.

Document Management is a part of Sage Timberline Office, fully integrated software created to streamline work and connect the people you depend on to build your business.

The screenshot shows the 'Timberline Office Desktop' interface. A 'Query Results' window is open, displaying a list of document categories on the left and a preview of an invoice document on the right. The invoice is from 'A-1 Electric' and includes a table of service items with descriptions, unit prices, and totals.

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
2.15	Completed Per Service Request Unit was off and on fan motor overload. Amps were to high for overload settings. Grounded 1 out of 2 blower wheel bearings. 1 in out of each of gross gas. Reset overload settings to 13.8. Refer to service ticket #56071. Compressor #2 see sheet cycling year.	\$5.00	204.25
7.00	Completed Per Service Request Blg #56, 3rd Floor Unit not running. Found short in low voltage wiring. Located short, unit up and running. Operation ok. Refer to service ticket #60264	\$5.28	712.50
5.00	Completed per Service Request Blg #56, 3rd Floor Unit not running. Found short in low voltage wiring. Located short, unit up and running. Operation ok. Refer to service ticket #60264	\$5.00	475.00
2.00	Completed Per Service Request Compressor #22 pulled system into vacuum and charged. Needs compressor oil and charge. Refer to Service Ticket #56880	\$5.00	100.00
5.00	Completed Per Service Request Compressor #22 added oil and adjusted refrigerant charge. TOW in building, equipment handling 10-20. Refer to Service Ticket # 40771	\$5.00	475.00

Powerful search capabilities allow users to limit results displayed based upon user-defined classifications.



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