

# STREAMLINING SALES ORDER PROCESSING WITH *doc-link*<sup>TM</sup>

Altec provides sales departments with an Integrated Document Management (IDM) solution, *doc-link*, that streamlines the processing of sales orders and enhances customer service.

Customer POs, quotations and other documents are readily available from the sales order desktop for viewing as required to process an order and reduce cycle time. If an approval is required, these documents can be routed to managers through workflow for electronic approvals. All documents are seamlessly captured as they are entered into or generated by Epicor Enterprise and indexed and stored in *doc-link* with the transaction data. *doc-link* automatically links all related documents, eliminating the need to print, copy, distribute and file paper.

In addition to streamlining the sales order process, the sales department's ability to service customers is greatly enhanced by having all documents related to a customer available for faxing or emailing from the desktop. Customer service is improved through first call response time with increased productivity.

*doc-link* brings greater control and visibility to the sales department from the initial receipt of a customer purchase order to the signed proof of delivery.



**SALES ORDER - Demo Distribution Company - Dallas Distribution Center**

File Edit Tools Application Utilities Report Window Help

Main More Commissions Currency Payment Blanket Ordered By User Def Fields

Order No: 0 Status: New Location: Dallas

Sold To: WEST001 Half Moon Bay Glass Service Back Orders: Allow BackOrder

Ship To: Half Moon Bay Glass Service Category:

Address: 133 Main Street User Status: WithRev

Half Moon Bay, CA 94019 SO Priority: 1

City: Half Moon Bay Disc %: 0.00

State/Prov: CA Delivery Dt: 10/03/2006

Postal Code: 94019 Sch Ship Dt: 10/03/2006

Country: USA United States Cancel Date: 00/00/0000

Bill To: WEST001 Price Level: 1

Contact: Lindsay Dam Ph#: (708) 634-7417 Ext Shipping Instr:

Cust PO: Entered: 10/3/2006 sa

Main More Ship To Shipments Releases Currency Inventory Kit ATP PD Price Break Order History

Line	Item No	Cust Item No	Uom	Loc	Ship To	Ordered / Shipped	Price	PC	Disc %	Margi

Ready 7.3.6.sp2 MJ6736sp2 demoControl (demoDist) sa (53)

Search Results #1

ID#	Format	Document Type	Pages	Company	Workflow	Cust PO Num	Customer	Date	Inv No	Quote Num	Cust Num
116	TIF	SDP - Customer Invoice	1	Demo Distribution Company		12096	Half Moon Bay	3/5/2002	32755700		
113	TIF	SDP - Customer Order	1	Demo Distribution Company		12096	Half Moon Bay	3/5/2002			
114	TIF	SDP - Order Acknowledgement	1	Demo Distribution Company		12096	Half Moon Bay	3/7/2002			.76

3 Rows. 1 Rows Selected.

**Sample Process for Sales Order Entry:**

- 1** Receive a customer PO via fax, email or mail.
- 2** By using workflow, view the PO in the *doc-link* viewer while entering the order into Epicor Enterprise.
- 3** When the order is saved with Epicor Enterprise, *doc-link* automatically indexes the customer PO with all of the order information and the next customer PO is displayed in the viewer of entry.
- 4** The Sales Order is 'printed' to *doc-link* for permanent archival in the *doc-link* repository. Users throughout the organization – and even the customer – can be granted access to the document. By having all documents related to an order or customer file in the same repository, sales reps and customer service staff are able to answer questions on the first call.
- 5** *doc-link's* Output Manager can be configured to automatically route the Order Acknowledgement to the customer by email, fax, standard print or FTP based on their own preferences.

In addition, *doc-link* is integrated in a similar fashion with the Quotation, Delivery and AR invoice screens to automate those portions of the sales process as well.

