



# DataView Document Management System

Standardize operations, improve productivity, reduce costs, and secure your company's data.

The DataView Document Management system helps businesses reduce dependency on paper by managing records electronically, improving communication between multiple branches and elevating customer service. Missing, incomplete information can negatively impact your business. By keeping your data in a central repository, or electronic 'file cabinet' for data verification purposes, DataView boosts efficiency, improves document security and closes the loopholes that will inevitably impact your bottom line.

---

- File, Store and Retrieve Documents
- Get Instant Information Access
- Secure Digital Documents
- Improve Customer Service
- Go Paperless to Reduce Costs

## Optimizing Your Business

DataView solves the specific paperwork problems you face every day. Images of system-generated transactions are instantly stored and linked to related transactions behind the scenes and can be quickly accessed at any time, from anywhere.

DataView provides instant results for lookups, even across one billion plus documents. Flexible scanning and import options automatically store and link digitized documentation to ERP-generated transactions. Store receiving reports, customs documents, modified drop slips, and work picks with purchase orders. Store bills of lading, signed invoices/proof of delivery, customer emails re: damaged goods with sales orders. Link A/P checks with vendor invoices and A/R checks with the bank deposits, etc. Reduce overhead associated with handling information, avoid the duplication of documents, save on paper and storage for files and ensure your audit trail is secure and complete.



## Document Management Capabilities

### File & Store Documents

Capture, file and store Word documents (.doc), spreadsheets (.xls), .pdf customer statements, pictures, documents in .tif and .jpg format, customer signatures, etc. in a secure digital repository.

### Import & Sort Documents

Import and sort documents across a network that are electronically generated, scanned, or emailed.

### RESTful API

Document management capabilities can be easily added to your CRM, accounting and other business applications. The applications can easily add documents, create folders, and view documents stored in DataView.

### Automate Document Indexing

Each transaction in your ERP Software is automatically barcoded and auto indexed into the correct 'drawer' and folder based on the transaction type.

### Reduce Costs

Save on storage, paper, and labor spent filing and retrieving information. Simplify compliance with government regulations and ensure successful audits.

### File Protection

Restrict access to documents according to document type, view-only access, or user clearance. Image dating technology virtually eliminates any possibility of altering documents without detection.

### Instant Information Access

Customer statements, Purchase orders, acknowledgements, delivery receipts, check runs, etc. can be located in seconds and will never get lost, improving the accuracy and quality of customer service.

### Import Emails & Attachments

Import emails and attachments into DataView. Multiple documents can also be merged into a single pdf for export.

### Content Search

Search for content across all the documents and indexes stored in the system. Quickly locate document content that is not available with DataView's standard indexing capabilities.

Ready to get  
started with DataView?  
Contact us today.