

Integrated Document Management: Sage ERP SharePoint Integration

ConnectPoint seamlessly integrates Sage ERP with Microsoft SharePoint, delivering a comprehensive Enterprise Content Management (ECM) solution. Leveraging the power of Microsoft SharePoint, ConnectPoint provides organizations a full-featured, secure, and integrated system designed to address their paper and document challenges.

Powerful and Unified

With its advanced features in document management, workflow and business intelligence, Microsoft SharePoint has become the industry-leading platform for accessing documents, data and information. ConnectPoint allows for real-time interoperability between SharePoint and Sage ERP; solving all document, records, and content related challenges. With a click of a button ConnectPoint enables Sage ERP users to seamlessly access documents directly from the Sage ERP screens. The result is a powerful, unified system delivering user adoption and success where legacy systems have failed.

Microsoft SharePoint with ConnectPoint for Sage ERP is available as a cloud-based or as an on-premise solution.

Streamline Processes and Improve Access to Sage ERP Data

- Access documents from within Sage ERP
- Full document/record lifecycle management
- Automated approvals
- Enterprise search and retrieval
- Security and compliance controls
- Auditing and e-Discovery capabilities
- Executive dashboards
- Cloud collaboration

Capture and Index ↔ *Automatically Pass Data* ↔ *Search and Retrieve*



Microsoft SharePoint® is the most popular document management solution in the world, facilitating data sharing across organizations of all sizes.

ConnectPoint™ brings these two powerhouses together; creating a seamless, intuitive integration that supports, promotes, and enforces your organization's workflows.

Sage ERP is the solution you use for the tools and functionality your organization needs to manage operations and grow success.

Promote User Adoption

■ Drive transparent process

ConnectPoint with SharePoint makes content management more accurate and efficient. With its simple, “behind-the-scenes” integration and administration, you can automate key business processes and apply policies and taxonomies quickly and consistently.

■ Encourage everyone to participate

ConnectPoint with SharePoint simplifies content tagging and classification, making it easier for people to find, share, and use information. This means everyone can spend more time focusing on their high-value tasks instead of dealing with repetitive requests for information and recreating content that already exists.

Decrease Costs by Managing the Right Content

■ Decrease storage needs across your company

ConnectPoint with SharePoint provides multi-stage policies that can be used to drive retention schedules, controlling when content should be archived or expired. With these policies, you can be sure that you effectively dispose of content, rather than keeping it indefinitely, decreasing the amount of information you need to store and manage.

■ Decrease risk through compliance

ConnectPoint with SharePoint features a familiar user experience that helps you and your people manage content quickly and confidently. With properly managed content, your company can maintain retention schedules according to industry or government regulations, decreasing the risks and costs associated with non-compliance.

■ Increase search relevancy

ConnectPoint with SharePoint provides retention scheduling that can be used to move irrelevant content out of the search index. When only relevant content is returned in search results, people can find information in less time and increase productivity.



Make the Tools Support the Organization

■ Choose the right records management strategy

ConnectPoint with SharePoint lets you choose the records management strategy that works best for your organization. You can manage records in-place, archive them to a central repository, or combine the two approaches. This flexibility can help you strike the balance between providing context and centrally managing large volumes of content.

■ Manage content consistently

ConnectPoint with SharePoint handles information of all types. Whether working with documents, web pages, or social content, you can consistently manage versions, declare records, apply retention schedules, place legal holds, and run audit reports.

■ Manage compliance with detailed auditing

ConnectPoint with SharePoint provides e-Discovery and detailed audit reporting at both the individual file level and across repositories. Compliance officers can see information on user access, file plan configuration, litigation holds, records status, and content type.

Capture Sage ERP Related Data

By using ConnectPoint with SharePoint, you can capture invoices, purchase orders, credit memos, routing slips, images, videos, PDFs, plus other related documents, and tag them with the appropriate Sage ERP data.

Store the documents securely throughout their lifecycle and route those requiring approvals according to the workflow you define. Every document is fully text-indexed, allowing you to search all of the content within.

From a single screen, users can review, approve, search, route and share files.

Fits the Way You Work

- Tag documents with Sage ERP specific data
- Automate your approval workflow
- Alerts keep your documents moving
- Minimize duplicate data entry by creating invoices in Sage ERP automatically
- Search and retrieve documents instantly
- Simplify document retention tasks
- Reduce paper shuffling and storage

Easy to Use

Simply scan in paper documents or upload / drag-n-drop electronic documents directly and tag them with the appropriate Sage ERP data, such as vendor, GL account, invoice numbers and purchase order numbers. Next, send your documents on the approval routing that matches your organization's workflow process. Approval takes place right in ConnectPoint, reducing the process from days to minutes. Once approved, ConnectPoint's real-time integration pushes the information into Sage ERP, creating a new invoice batch. You eliminate duplicate data entry tasks and ensure compliance with your organization's procedures.

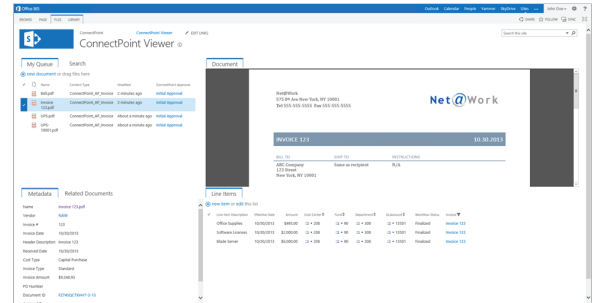


Benefits of ConnectPoint for Sage ERP:

- ✓ Organizational collaboration
- ✓ Defined structure to how documents are managed
- ✓ Data protection and security
- ✓ Increased document search & accessibility
- ✓ Reduced storage and operating costs
- ✓ Reduced data entry
- ✓ Reduced time in the decision making process
- ✓ Reduced risk and cost associated with non-compliance

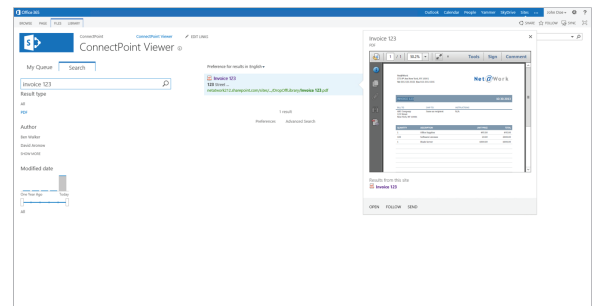
Integrates Sage ERP with Microsoft SharePoint

- Real-time integration pushing information directly from Sage ERP.
- Provide true document/record management for the entire organization.
 - Version control
 - Check-in, Check-out
 - Lifecycle management
 - Group and granular security
 - Lock down documents as records
 - Retention Policies and Disposition Schedules
 - e-Discovery



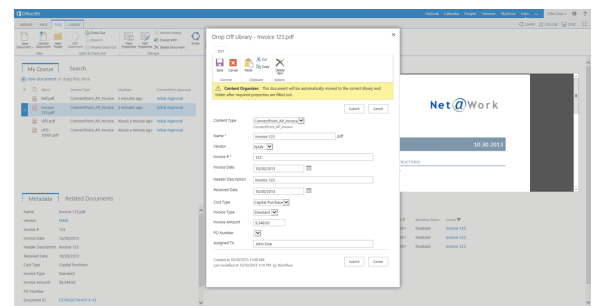
Electronically Store, Index & Search

- Capture all paper and electronic documents and store in a true management system.
- Store all document types for your entire organization.
 - Invoices, packing slips, purchase orders
 - Spreadsheets, PDFs, Images, Videos
- All documents are full text indexed, allowing you to search all the content within the documents.



Automatically Create Invoice Batches Directly in Sage ERP

- During the capture process, index all necessary data for invoices and related documents.
- Once approved, this data will automatically push with all selected invoices in a single batch into Sage ERP, reducing the need to manually enter.



Automate Approval Processes with Workflow Management

- Once an invoice has been captured, it enters a queue and is assigned immediately to the appropriate approver.
- An approval can be done instantly in the ConnectPoint viewer, reducing the approval process from days to minutes.

