

## Integrated AP Automation & Workflow: Sage 100 ERP and Microsoft SharePoint®

ConnectPoint Document Management seamlessly integrates Sage 100 ERP with Microsoft SharePoint, delivering a comprehensive Enterprise Content Management (ECM) solution. Leveraging the power of Microsoft SharePoint, ConnectPoint Document Management provides organizations a full-featured, secure, and integrated system designed to address their paper and document challenges.

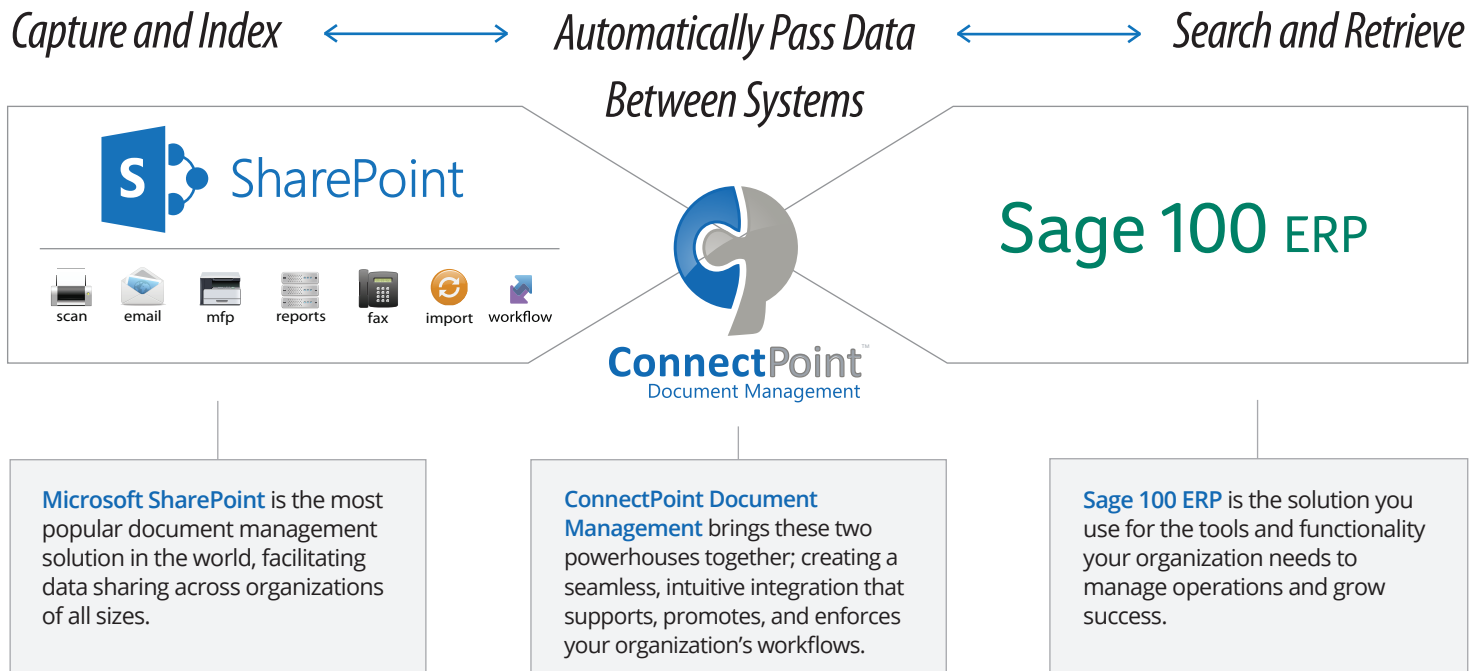
### Streamline Your Accounts Payable Processes

- Access documents from within Sage 100 ERP
- Full document/record lifecycle management
- Automated approvals
- Enterprise search and retrieval
- Security and compliance controls
- Reduced Storage & Operating Costs
- Reduce Data Entry Time
- Cloud collaboration

## 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 Document Management allows for real-time interoperability between Microsoft SharePoint and Sage 100 ERP; solving all document, records, and content related challenges. With a click of a button ConnectPoint Document Management enables Sage ERP users to seamlessly access documents directly from the Sage ERP AP screens. The result is a powerful, unified system delivering user adoption and success where legacy systems have failed.

Microsoft SharePoint with ConnectPoint Document Management for Sage 100 ERP is available as a cloud-based or as an on-premises solution.



# How ConnectPoint Document Management Works with Sage 100

## Capture Sage 100 Related Data

By using ConnectPoint Document Management with Microsoft 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 100 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

- Automate your AP approval workflow
- Tag documents with Sage 100 specific data
- Alerts keep your documents moving
- Minimize duplicate data entry by creating AP invoices in Sage 100 automatically
- Search and retrieve AP 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 100 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 Document Management, reducing the process from days to minutes. Once approved, the real-time integration pushes the information into Sage 100 ERP, creating a new invoice batch. You eliminate duplicate data entry tasks and ensure compliance with your organization's procedures.



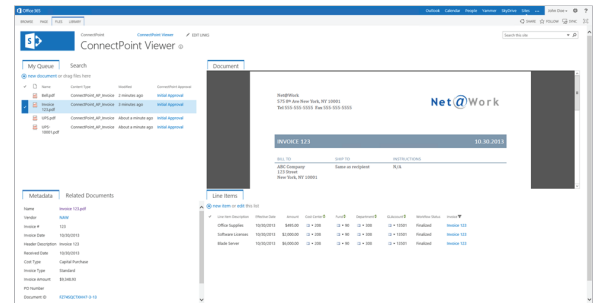
## Benefits of ConnectPoint Document Management for Sage 100 Accounts Payables:

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

# Explore the Features of ConnectPoint Document Management

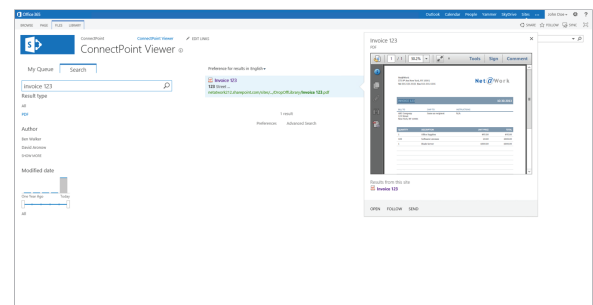
## Integrates Sage 100 ERP with Microsoft SharePoint

- Real-time integration pushing information directly from Sage 100.
- 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



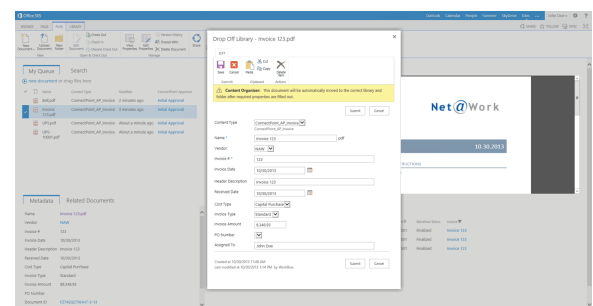
## Electronically Store, Index & Search

- 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.



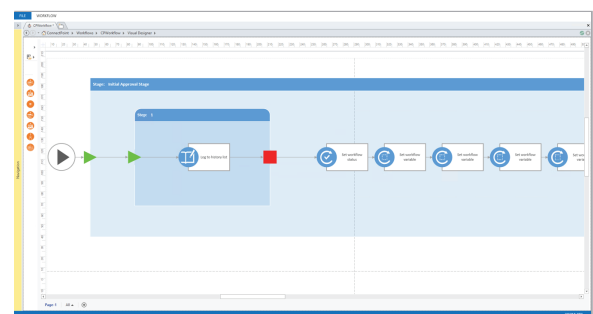
## Automatically Create Invoice Batches Directly in Sage 100 ERP

- 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 100, 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 Document Management viewer, reducing the approval process from days to minutes.



# Benefits of ConnectPoint Document Management

## Promote User Adoption

### ■ Drive transparent process

ConnectPoint Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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 Document Management with Microsoft 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.