

What's New in Electronic Document Management with Business Automation for Manufacturers

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DocStar[®]
An Epicor Solution



Housekeeping

- ▶ All lines muted
- ▶ Enter questions in Q&A box
- ▶ All questions answered during Q&A session
- ▶ Webcast is being recorded
- ▶ Recording shared via email to replay at your leisure or share it with colleagues

Q&A ×

All (0)



Select a question, and then type your answer here. There is a 256-character limit.

Agenda

- ▶ Brief Introduction and Overview of DocStar
- ▶ Epicor Solution Integration with DocStar ECM
- ▶ AP Automation
- ▶ Sales Order Automation
- ▶ Demo
- ▶ Epicor University
- ▶ Altec APM Migration
- ▶ Q&A

DocStar ECM Functionality Suite

▶ Designed for the Web (On-Premise or Cloud)

- Thin client, all major browsers supported
- Can be accessed from all major tablets and smartphones supported



▶ Capture, Store, Retrieve, Collaborate

- Scanning and batch importing of any content type
- Securely store documents with retention policies and automated filing instructions
- Rapid Searching (keywords, folders, full-text and “Google”-like)
- Content Viewer w/annotations
- Versioning (Check-in, Check-out)
- Rules-based, graphical workflow for process automation
- MS office and outlook integration for filing documents and emails into DocStar repository
- Document packages (bundled multiple types of documents)
- Electronic Forms (eForms)



▶ Accounts Payable (AP), Sales Order Entry, and HR Automation process solutions

▶ Epicor ERP 10 Integration

New Mobile App

- ▶ Approvals anytime
- ▶ View content on the go
- ▶ Email documents

The mobile app interface features a teal header with a menu icon, the 'DocStar' logo, and a lightning bolt icon. Below the header are two buttons: 'Approve' with a thumbs-up icon and 'Deny' with a thumbs-down icon. A dropdown menu labeled 'Content Fields' is expanded, showing a list of document metadata fields in a light gray, rounded rectangular format:

- Title: Invoice #1030 :: 5/7/2017
- SecurityClass: Accounting
- Workflow:
- Folders:
- Created: 10/4/2017
- EAP VendorName: Atlantic Powers, Inc.
- EAP InvoiceNumber: 1030
- EAP InvoiceDate: 5/7/2017
- EAP InvoiceAmount: \$1,753.84
- EAP Dept Mgr: Training@docstar.com
- Keywords:

The mobile app interface displays a sample invoice document. The teal header includes a menu icon, the 'DocStar' logo, and a lightning bolt icon. Below the header, the text 'Page 1' is centered. The invoice content is as follows:

Invoice Sample

To: Atlantic Powers, Inc.
Attn: Richard Jameson
3000 Powers Ct.
Bldg. B
St. Peters, DE 00222-1212

Invoice #: 1030
Invoice Date: 5/7/2009
Terms: Net 10 Days

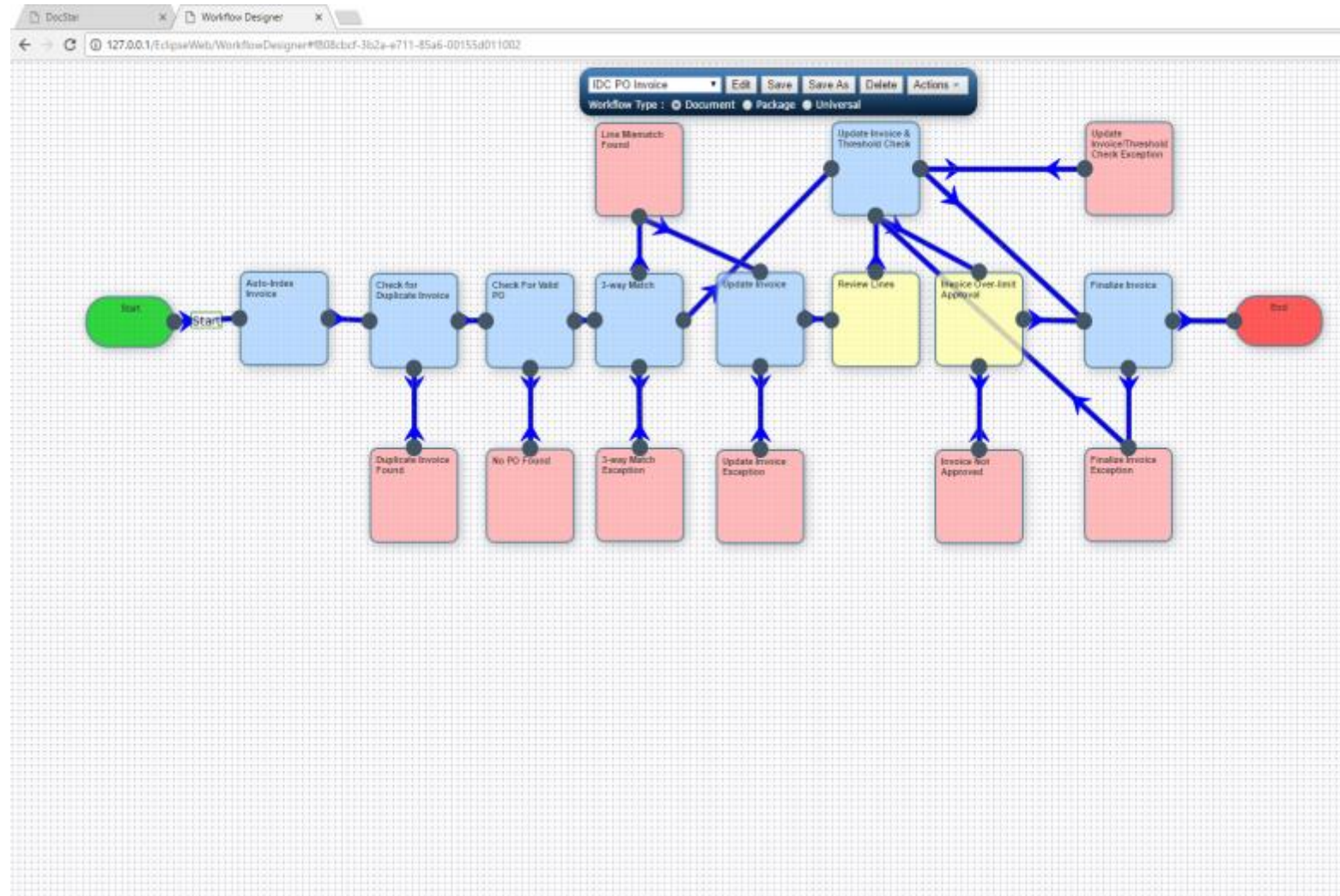
From: DocSTAR
2165 Technology Drive
Schenectady, NY 12308

Product #	Description	Price	Qty.	Line Total
7-3453	Screw Driver	\$6.99	16	\$111.84
9-3245	Hand Saw	\$27.50	58	\$1,605.00
Subtotal:				\$1,706.84
Sales Tax:				\$37.00
Shipping:				\$10.00
Total:				\$1,753.84

Barcode (Customer ID) Barcode (TYPE: Customer Invoice)

DocStar ECM Workflow Designer

- ▶ The DocStar ECM Graphical Workflow Designer empowers users to take control
- ▶ Users can expand the power of DocStar ECM to all parts of the organization

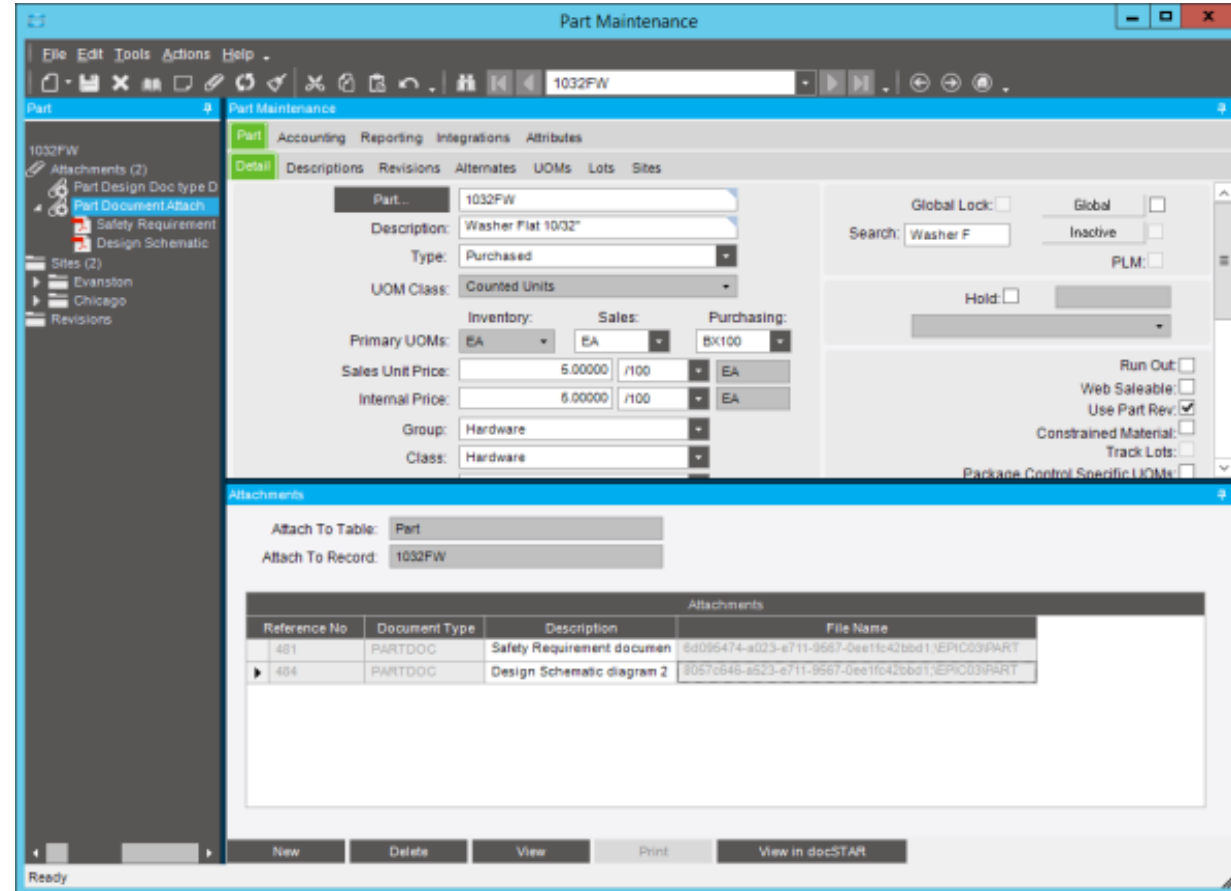


E10 Integration with DocStar ECM



ERP 10 Document Attachments and Advanced Print Routing with DocStar ECM

- ▶ Attach directly in E10
- ▶ Allows multiple documents in the same record
- ▶ View from left menu or attachments box
- ▶ Attachments can be version controlled
- ▶ E10 reports are "printed" and stored in DocStar ECM





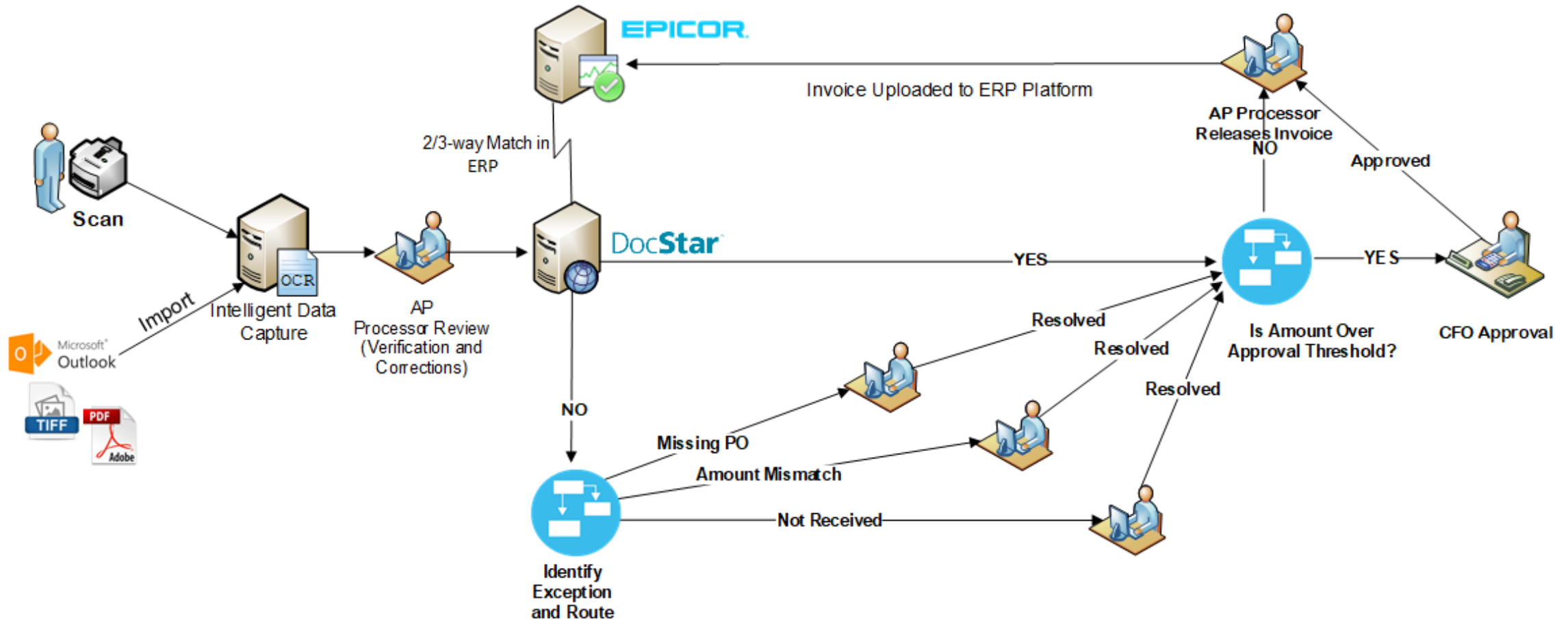
Demonstration of E10 Integration with DocStar ECM



Docstar ECM AP Automation for ERP

E10 – DocStar AP Automation

PO Based AP Invoice Workflow w/IDC



AP Automation Demonstration



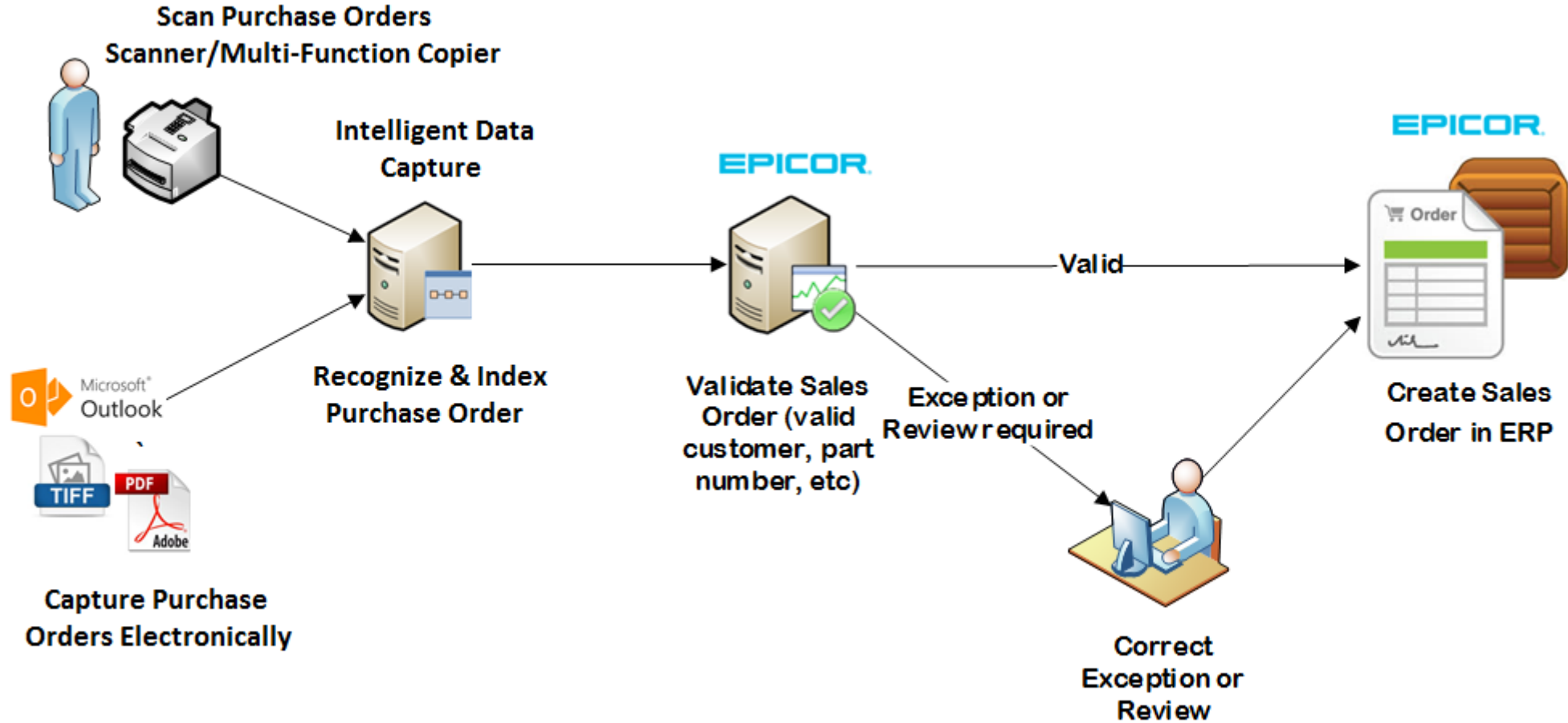
Sales Order Automation for ERP



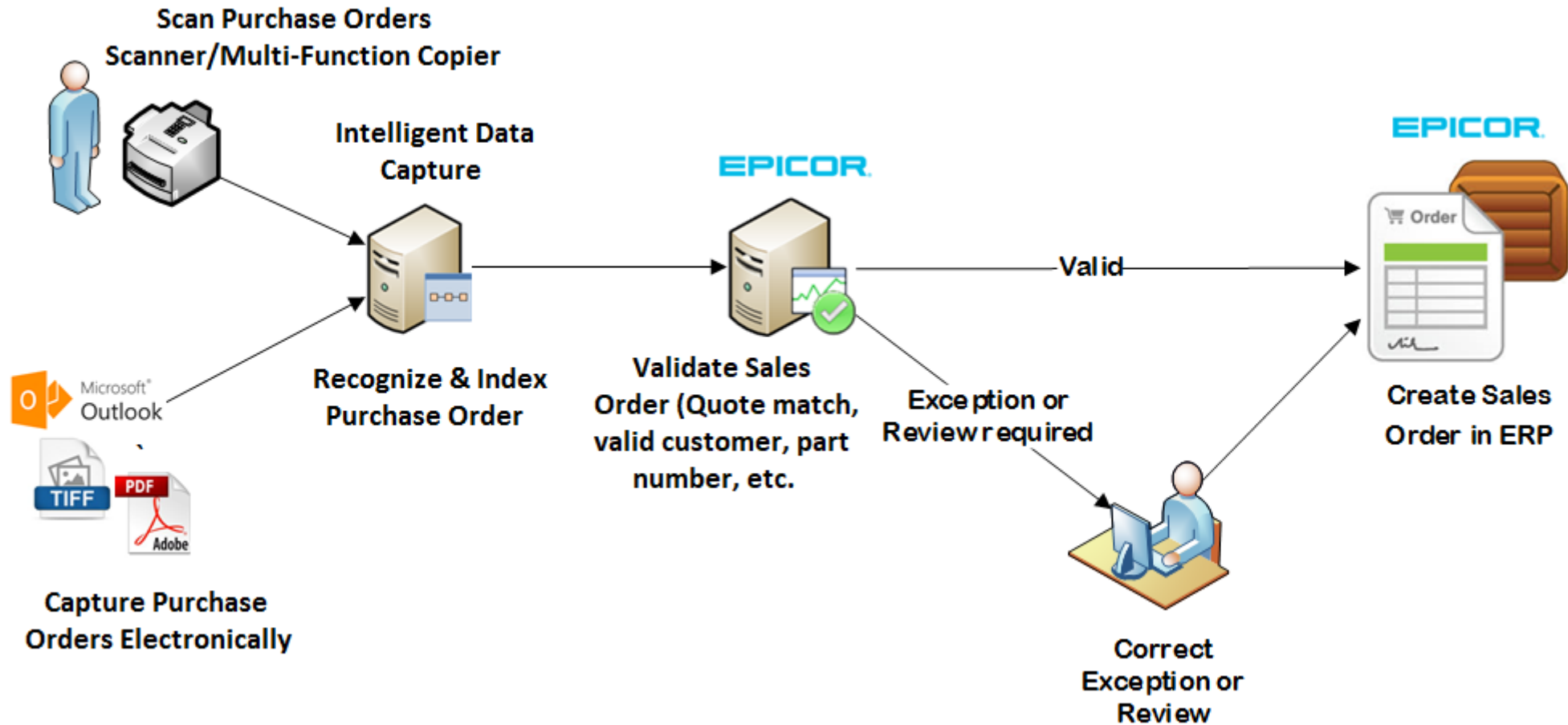
Sales Order Automation Solution Features

- ▶ Non-Quote based or Quote based (w/Quote validation)
- ▶ Valid Customer Checking
- ▶ Customer Credit Hold Checking
- ▶ Duplicate Sales Order Checking (based on customer & PO Number)
- ▶ Part/Item Number Validation
- ▶ Part/Item Number Availability/Stocking Level Validation
- ▶ Sales Order Amount Threshold Checking

ERP Sales Order Automation (non-Quote based)



ERP Sales Order Automation (Quote based)



Sales Order Automation Demonstration



Customer Benefits

- ▶ Less 'touch' of orders that have no exceptions
- ▶ A straight path to Auto Allocation and fulfillment for those orders with no exceptions
- ▶ Better use of human resources in resolving the orders with exceptions
- ▶ Uses technology and automation as a force multiplier
- ▶ Opportunity for transposition errors greatly reduced

DocStar Solution Recap

- ▶ DocStar is an Epicor product
- ▶ Seamless integration between E10 and DocStar ECM
- ▶ Accounts Payable (AP), SOA, and other business process solutions
- ▶ Document life cycle



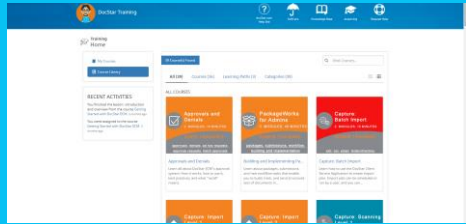
DocStar ECM Educational Resources

Multiple Sources of Knowledge

- CareCentral
- Guided Learning
- Help.DocStar.com



CareCentral



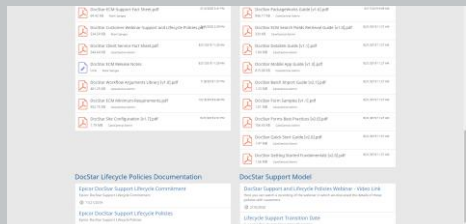
eLearning / LMS

- Videos, Quizzes, Guides
- Organized by Subject



Tip of the Week

- Search
- Subscribe



Guides & Documentation

- Printable PDFs
- Release Notes

CareCentral

The screenshot displays the DocStar CareCentral user interface. At the top left is the DocStar logo. To its right are navigation links for 'Main', 'Knowledge Base', and 'Cases'. On the far right of the top bar, there are dropdown menus for 'Softcare Premiere Customer' and 'DocStar Training', along with a search bar containing the text 'Cases' and a search icon.

Below the top bar is a blue navigation bar with several icons: a person icon for 'DocStar Training', a question mark for 'docStar.com Help Site', an umbrella for 'SoftCare', an open book for 'Knowledge Base', a graduation cap for 'eLearning' (which is highlighted with an orange border), and a lifebuoy for 'Request Help'.

Two prominent notification banners are present: a yellow one stating 'DocStar 3.x and Doculex Support has ended' and a green one stating 'Attention DocStar ECM Customers! DocStar ECM v19.1.42407, a maintenance and bug-fix release, has been released.' Below these are four colored cards representing different metrics: 'OPEN CASES' (302), 'BUG TICKETS' (7), 'PENDING ACTIONS' (2), and 'BETTERIZERS' (155). Each card includes a 'VIEW MORE' link with a right-pointing arrow.

At the bottom, there are two sections: 'Latest Knowledge Base Articles' featuring an article titled '500 Internal Server error' and 'Tips of the Week' featuring an article titled 'Sync Actions'. A large orange arrow on the right side of the page points downwards, indicating further content.

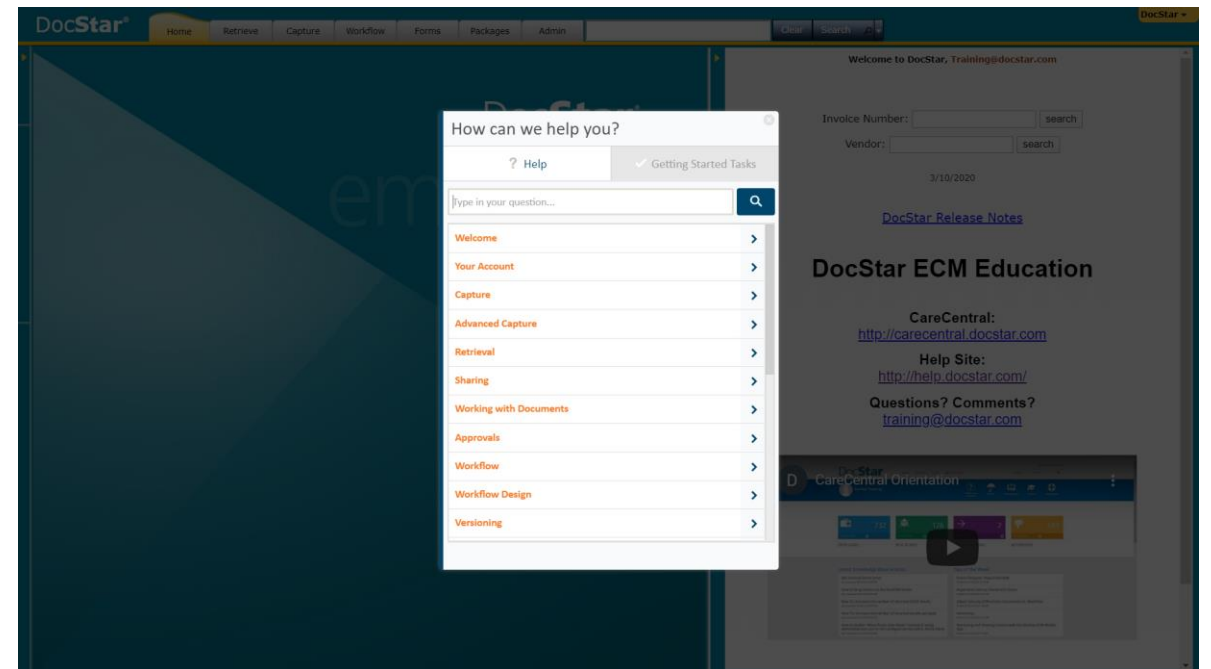
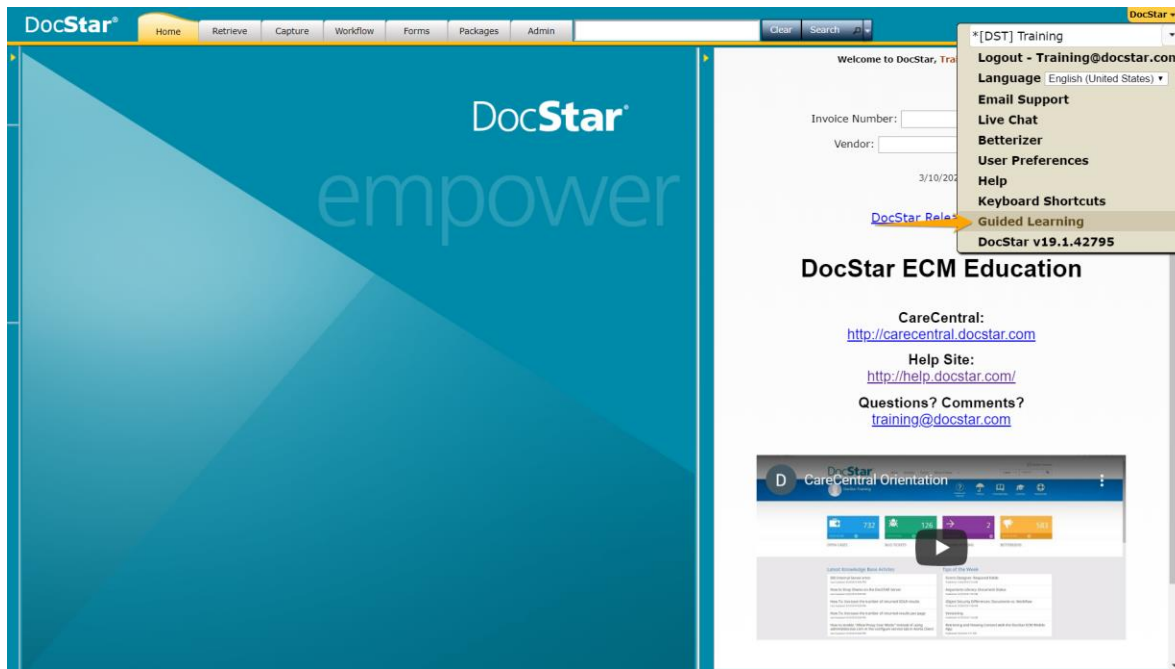
CareCentral

- Registration required.
Register here:
<https://carecentral.docstar.com/asp/Register>
- eLearning
- Tip of the Week
- Guides and documentation



Guided Learning

- ▶ Direct access to videos, articles, and step by step guided learning.



Guided Learning: Get Started, Get Guidance

How can we help you?

? Help ✓ Getting Started Tasks

100% Completed

- ✓ Show Me Around
- ✓ Retrieve and View a Document
- ✓ View The Workflow Queue
- ✓ Open User Preferences

This is the Containers space.
Note: You can browse folders and inboxes here. Click the triangle to expand or collapse it.

Workflow Forms Packages Admin Clear Search

Welcome to DocStar, Training@docstar.com

Invoice Number: search

Vendor: search

3/10/2020

[DocStar Release Notes](#)

DocStar ECM Education

CareCentral:
<http://carecentral.docstar.com>

Help Site:
<http://help.docstar.com/>

Questions? Comments?
training@docstar.com

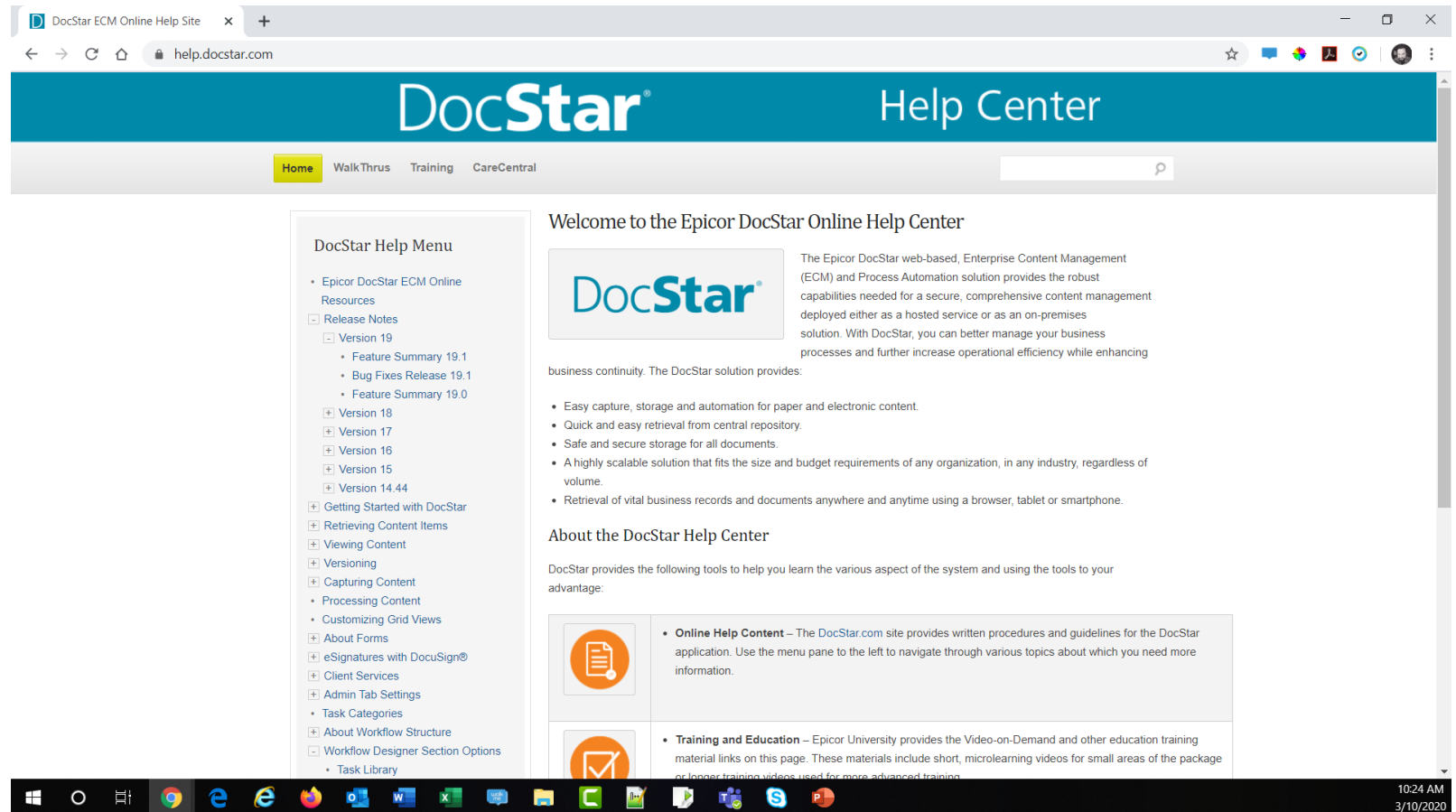
DocStar empower

DocStar CareCentral Orientation

732 OPEN CASES 126 BILL TICKETS 2 ... 583 RETURNERS

Help.DocStar.com

- ▶ Documentation
- ▶ Guides
- ▶ Release Notes
- ▶ Workflow Design Library

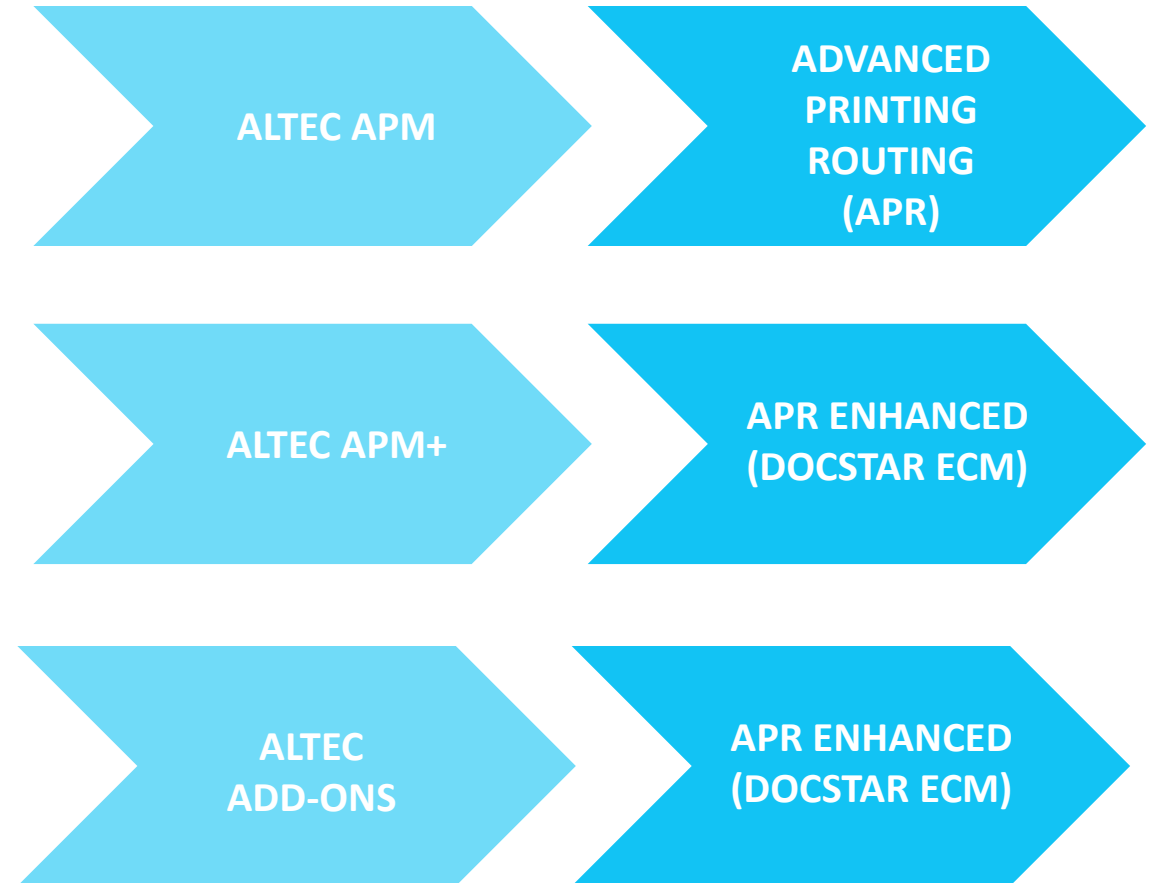


Demonstration Time!

Let's see it in action!

Altec APM Migration

- ▶ 50% off licenses for like-for-like APR/DocStar ECM



Q&A

Contact DocStar or Your Epicor CAM

DocStar

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info@docstar.com

DocStar[®]
An Epicor Solution

