

**Go Paperless!**  
**November 15, 2012**

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&


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**DM2 Software, Inc.**

**DM<sup>2</sup>**  
software, inc.

**Go Paperless!**  
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# Testimonials

- **Hagan Kennington Oil**
  - Paperless world since 2007
  - Hesitant to scan everything and not keep a hard copy as a back up
- **DM2 Consultants**
- **DM2 Support Desk**



November 14, 2012

Hagan Kennington Oil Co., Inc. has been a part of the paperless world since 2007. We were very hesitant to scan everything and not keep a hard copy as a backup. Under Teri Geertgens guidance we were shown the correct way to store and Retrieve all documents. No more filing documents or setting up files for the new Year. Paperless has saved time and space as well.

At first we started storing all reports related to Accounts Receivable, Accounts Payable, Purchasing, Inventory and General Ledger. Eventually we stored A/R pods and invoices, purchase orders, A/P invoices, sales quotes and other legal documents. We're currently in the process of setting up a "privacy box" through Paperless for personnel files. As long as a document is stored & indexed properly, it can be retrieved several ways. It's so much easier to push a button instead of going through a file cabinet to locate a document.

Paperless has definitely become part of our routine workday!

Thank you DM2!

Cindy Wilson  
Hagan Kennington Co., Inc.

***"It's so much easier to push a button instead of going through a file cabinet to locate a document"***

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# Paperless Office Solutions

## Two Options

- **Sage Paperless Office**

- Turns documents automatically into PDF and stores them on your DM2 Server
- Included with your investment- version 4.3 and above
- Will store any document that is in the print stream of general accounting
- Journals – registers – reports
- Good Tool for basic storage
- Great way to get started!

- **DM2 Paperless powered by Cypress**

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# Documents

- **DM2 Paperless powered by Cypress**
  - Enterprise Class Fortune 500 level functionality and performance
    - New York Stock Exchange
    - General Mills
    - 3M – 22 countries
  - Comprehensive document storage
  - Handles external documents (Word, Excel, etc.)
  - Handles scanning
  - Advanced Search Engine
  - Sophisticated Security
  - Workflow management

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# DM2 Paperless

- **Scanning**
  - Signed Delivery Tickets
  - Credit Applications
  - Bill of Ladings
  - Driver Reports
  - Deliveries from Common Carriers



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# Print Stream Capture

- **Some of the Documents Supported**
  - Purchase Orders
  - Vendor Returns
  - Sales Orders
  - Sales Order Invoices
  - Accounts Receivable Invoices
  - Journals and Registers
  - Period End Processing Reports
  - All standard reports generated by the system, including those created using Business Insights Reporter

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# DM2 Paperless

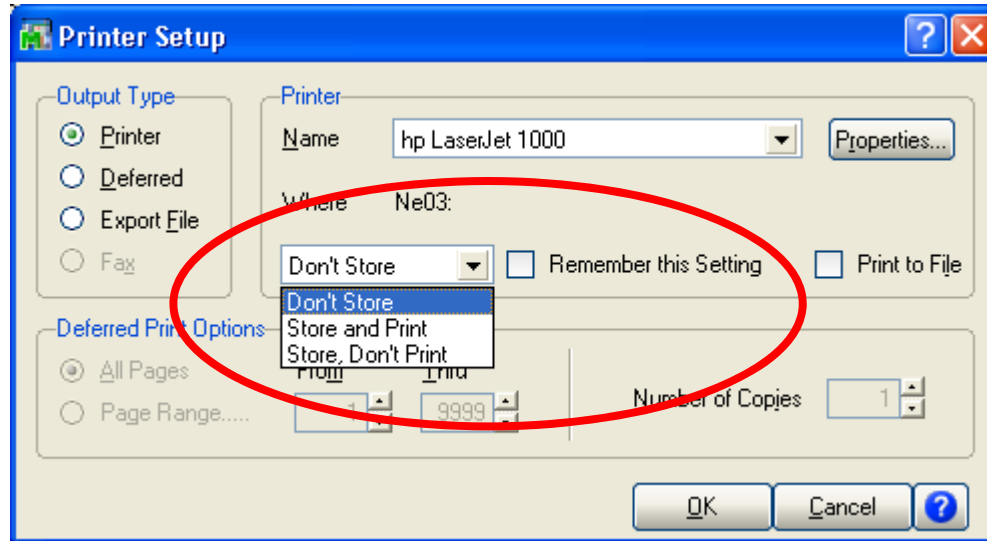
- **Workflow**
  - A/P Approval Process
  - Statement Process
- **Document Bundling**
  - Signed Delivery Ticket going out with invoice
- **Support Centralization of Functions**
  - Documents can be scanned remotely and consolidated centrally

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# DM2 Paperless



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# Document Retrieval

The screenshot displays three overlapping windows from a software application. The 'Customer Maintenance' window shows a list of transactions for customer 'ERIC'S OIL FIELD'. The 'Customer Inquiry' window shows details for a specific customer. The 'Paperless Document Lookup' window is in the foreground, showing search criteria for document retrieval. A keyboard strip at the bottom highlights the F6 key with a red circle.

Invoice Number	Trn Typ	Invoice Date	Due Date	Trans Date	Transaction Amount	Discount Amount	Invoice Balance
	PMT	Chk No:1234		05/09/07	874.02-	.00	.00
0001865	INV	05/09/07	05/09/07	05/09/07	767.04	.00	767.04
TEST	INV	02/11/04	02/11/04	02/11/04	444.72	.00	.00
	PMT	Chk No:1234		05/09/07	444.72-	.00	.00
TEST1	INV	02/11/04	02/11/04	02/11/04	347.22	.00	.00
	PMT	Chk No:1234		05/09/07	347.22-	.00	.00
TESTA	INV	08/01/04	08/01/04	06/08/04	871.50	.00	.00
	PMT	Chk No:1234		05/09/07	871.50-	.00	.00
TESTB	INV	08/05/04	08/05/04	06/08/04	871.50	.00	.00
	PMT	Chk No:1234		05/09/07	871.50-	.00	.00
TESTC	INV	08/10/04	08/10/04	06/08/04	871.50	.00	.00
	PMT	Chk No:1234		05/09/07	871.50-	.00	.00
TESTEMA	INV	03/31/04	03/31/04	03/31/04	249.72	.00	.00
	PMT	Chk No:1234		05/09/07	249.72-	.00	.00

Balance: Current 767.04, 30 Days .00, 60 Days .00, 90 Days .00, 120 Days .00

Creation Date: 4/14/2007 - 12/31/2099  
Document Title: [checked]  
Document Creator: [checked]  
Contents: All of, 0001865

Keyboard strip: esc, F1, F2, F3, F4, **F5, F6, F7, F8**, F9, F10, F11, F12

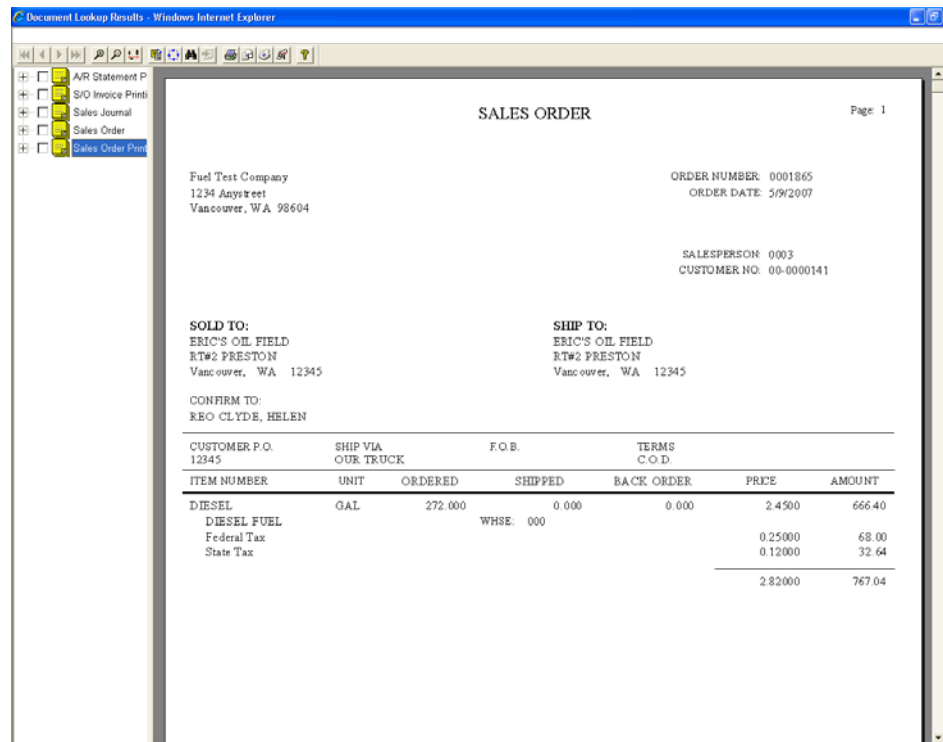
Select any field and press the “F6” key.

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# Document Retrieval



The screenshot shows a web browser window titled "Document Lookup Results - Windows Internet Explorer". The main content is a scanned document titled "SALES ORDER" (Page 1). The document contains the following information:

**Customer Information:**  
Fuel Test Company  
1234 Anystreet  
Vancouver, WA 98604

**Order Information:**  
ORDER NUMBER: 0001865  
ORDER DATE: 5/9/2007

**Salesperson Information:**  
SALESPERSON: 0003  
CUSTOMER NO.: 00-0000141

**SOLD TO:**  
ERIC'S OIL FIELD  
RT#2 PRESTON  
Vancouver, WA 12345

**SHIP TO:**  
ERIC'S OIL FIELD  
RT#2 PRESTON  
Vancouver, WA 12345

**CONFIRM TO:**  
HEO CLYDE, HELEN

**Customer P.O.:** 12345

**SHIP VIA:** OUR TRUCK

**F.O.B.:** WHSE: 000

**TERMS:** C.O.D.

ITEM NUMBER	UNIT	ORDERED	SHIPPED	BACK ORDER	PRICE	AMOUNT
DIESEL	GAL.	272.000	0.000	0.000	2.4500	666.40
DIESEL FUEL						
Federal Tax					0.25000	68.00
State Tax					0.12000	32.64
					2.82000	767.04

This screen allows you to work with the found documents

Documents include scanned docs

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# Advanced Paperless

- **Automatically distribute documents to multiple people**
- **Send eDocs via email/fax**
- **Improve work flow using document routing with electronic approval**

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# Demonstration

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## Learn how Sage ERP Intelligence Reporting will help you access strategic information, boost productivity and save time and money

Join us for a Webinar on December 13

**REGISTER NOW**

**Space is limited.**

Reserve your Webinar seat now at:

<https://www1.gotomeeting.com/register/201963497>

DM2 Software invites you to attend our "Sage ERP Intelligence" (formerly Sage MAS Intelligence) webinar on December 13, 2012 at 11:30am Pacific Time/1:30pm Central Time. Join DM2 and Sage Software to learn how this new Business Intelligence and Reporting Tool found in the new 4.4 release of our Petroleum Insights system gives you quick and easy access to the information you need to improve operations and reporting across your entire company. This new replacement for FRx is based on the familiar Microsoft® Excel® application, making it easy to learn and use. See how Sage ERP Intelligence's standard, presentation-quality, out-of-the-box reports and customization features will help you:

- Spend less time doing repetitive data extracts and pulling data together from static reports
- Easily customize and personalize reports
- Quickly access the Key Performance Indicators that drive your business

You will also learn how the new Report Designer Add-in feature for General Ledger Financial Reporting empowers you to take control of all of the design aspects of your reporting layouts. The Report Designer Add-In allows you to breakdown reports into reusable pieces and then control where and how these pieces fit together to create new reports. These reusable pieces are Excel functions that communicate with a new In-Memory processing engine to give you the ability to quickly and easily crunch numbers and create new reports.

Attend DM2's Sage ERP Intelligence webinar to see how this new Business Intelligence and Reporting Tool will give you the ability to effortlessly run reports and analyze data to improve your visibility into your organization.

Space is limited, so register today!

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Handwritten: International Freight Company

11213 Mackay Blvd Lane	Driver Cash	Vehicle Class
110091	Driving	
10051272	Billing Cycle: M	
	Invoice Format: 02	NO COLUMN W/MPG
	Sort 1: INTER	Sort 2:
	Type of Card: B	
	Fee ID: N7929	
	Group: 00	NO GROUP
	Price Level: 0	Price Table:
	Credit Limit: .00	

Buttons: Validate, Cancel, Delete

10000000	Del Status:	None	Item:	04
10000000	Tank Size:	400	Current O-Order:	200
10000000	Options:		Last O-Order:	200
10000000	Last Delivery:	07/03/03	Next Engine Day:	3/00
10000000	Last Del Gallons:	7.300	W/View O-Order:	900
10000000	Service Contract:		Service O-Order:	900
10000000	Tank Contract:	02/12/03	Fuel/Spang O-Order:	900
10000000	Route:	NW	Locked O-Order:	Y/N

State	Product/Order	Name	City
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO
IL	10000000	JEFFERSON TRUCKING	CHICAGO

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