

Sage Paperless Office

April 11, 2013

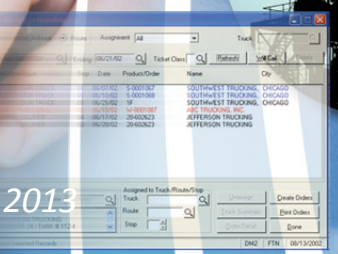
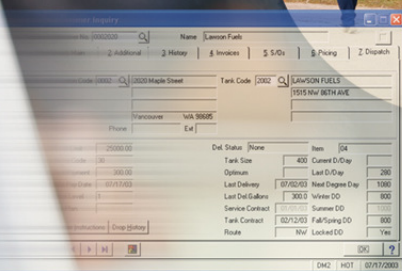
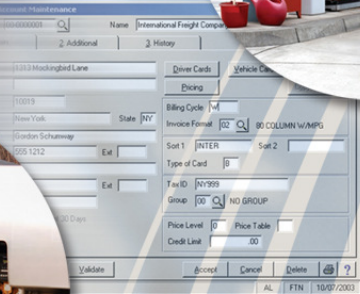
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Sales Engineer
Sage Software, Inc.

&

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DM2 Software, Inc.

DM²
software, inc.

Sage Paperless Office
Connections Webinar – April 11, 2013



Agenda

- How Paperless Office Saves You Time, Money, and Frustration
- Case Studies
- Demonstration
- Questions?



How Does Paperless Office Help You Achieve Greater Efficiency?

REDUCES: Paper
Hardware
Postage
Recycling
Disposal
Storage
Labor



The Paperless Office Module



Paperless Office

1 Sage-Extended Solutions, or enhancements to Sage 100 are included at no charge – worth over \$15,000!

Systematic & Secure method for generating, archiving,

retrieving, off-line archiving and delivering Sage 100 documents in a

• **digital format & Registers**

• **Period End Processing**

✓ Auto Generate documents with little or no user intervention

• **Standard menu reports**

» Predetermine workflow and storage location by document

• **Associated Source Documents**

» Standardized Filenames

• **External Documents: Email and Fax documents to your customers and vendors automatically**

✓ Electronic Delivery (e-mail/fax)

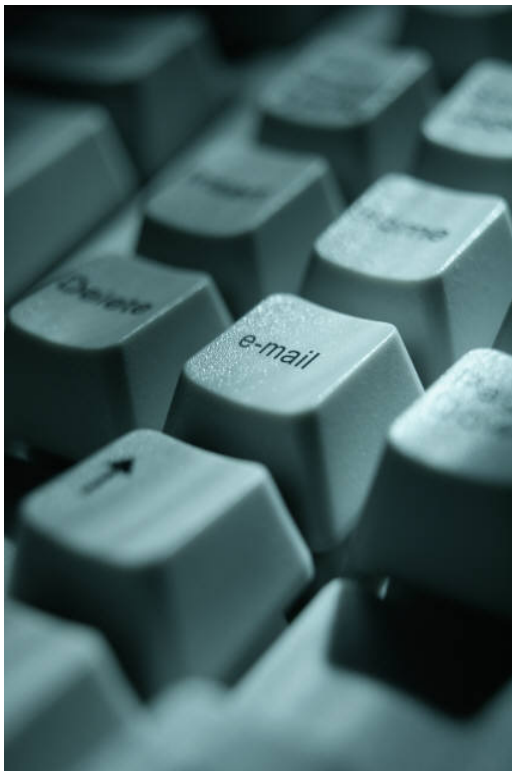
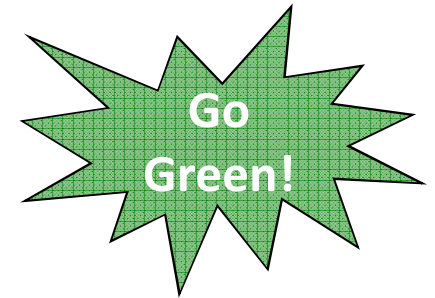
• **Transaction based documents meant for transmission to another party: Sales**

Invoices, AR, Utility provided both within and outside of Sage 100

Print, store & retrieve journals & registers in PDF format so that you can manage documents electronically



E-mail & Fax Paperless Docs



- Accounts Receivable Invoices & Statements
- Sales Orders & SO Invoices
- Purchase Orders & PO Return Orders
- Customer RMAs & RMA Receivers
- Job Cost Invoices
- Payroll Direct Deposit Stubs



Paperless Office SMTP Encryption

- *No need to maintain dedicated Email server!!!*
- Google mail, Yahoo, Hotmail, etc.
- Chillkat 9.3.0 now installed
- Company Maintenance E-mail tab
 - Select SSL or TSL/STARTTLS



Microsoft Faxing Supported

Paperless Office uses Microsoft Windows faxing

- Keeps cost of ownership down
- No additional charge for faxing functionality



Paperless Office Document Management

Internal Documents

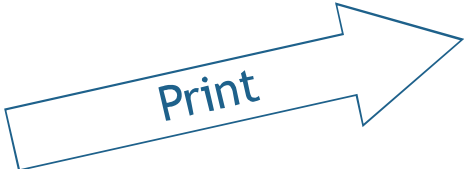
Journals & Registers
Period End Reports



Access in
PDF Viewer

External Documents

Invoices
AR Statements
Purchase Orders



Paper Copy
for mailing

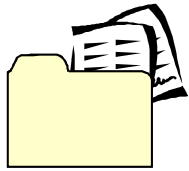


To Customers
and Vendors



Access in
PDF Viewer





Paperless Office: Journals & Registers - PDF Viewer = Document Retrieval & Management At Your Fingertips

Documents Retrieval:

- Filter
- Sort
- View

Document Management

- Delete
- Move

View Paperless Journals And Registers

Company: ABC ABC Distribution and Service Corp. Refresh

Module: AR Accounts Receivable

Document: ARWJAA Sales Journal Accounting Date From: 05/31/2003 To: 12/31/2999

| Co | M.. | Journal No | Batch | Journal Name | System Date - Time | Acct Date | User ID | Exists? | Updated? | Pas |
|-----|-----|------------|-------|--------------|----------------------|------------|---------|---------|----------|-----|
| ABC | AR | AR-0005 | All | SalesJournal | 2005-07-20 16:20:... | 2003-05-31 | QC | Yes | Yes | |
| ABC | AR | AR-0006 | All | SalesJournal | 2005-07-20 16:28:... | 2003-05-31 | SLS | Yes | Yes | |
| ABC | AR | AR-0007 | 00004 | SalesJournal | 2005-07-20 16:38:... | 2005-07-20 | SLS | Yes | | |
| ABC | AR | AR-0007 | 00004 | SalesJournal | 2005-07-20 16:38:... | 2005-07-20 | SLS | Yes | | |
| ABC | AR | AR-0007 | 00004 | SalesJournal | 2005-07-20 16:39:... | 2005-07-20 | SLS | Yes | Yes | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-07-20 16:40:... | 2005-07-20 | SLS | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-07-20 18:07:... | 2005-07-20 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-07-21 07:06:... | 2005-07-21 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-08-03 20:42:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-08-24 12:18:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-08-24 18:17:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-08-24 22:56:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-08-25 00:15:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-09-12 16:01:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-09-13 06:35:... | 2003-05-31 | QC | Yes | | |
| ABC | AR | AR-0008 | All | SalesJournal | 2005-09-13 06:37:... | 2003-05-31 | QC | Yes | | |

View Delete Move Exit

QC ABC 3/22/2006

Built in Security

- **Security level 1: ACCESS and Viewing properties**
 - Respects standard Sage 100 task securities
 - Set up Security Events in Role Maintenance
- **Security level 2: DELETION**
 - New Security Events
- **Security level 3: Life Outside of Sage 100**
 - Adobe Acrobat password security



Associated 'Source' Documents

- **Attach to a Journal or Register**
 - Determine in Setup the affected Journals & Registers
 - User will be prompted when printing those source 'enabled' J&Rs
- **Paperless Viewer**
 - Accessible at the Paperless viewer in conjunction with the J&R
 - New column will indicate if "Source Exists"



DM2 Supported Documents

- CardLink Sales Journal
- CardLink Daily Transaction Register
- Bill of Lading Journal
- Bill of Lading Daily Transaction Register

Paperless Office in Action

- Real Life Case Studies where Paperless Office Improved Business Practices:
 - TruGlo
 - Controls International



Real Life Case Study where Paperless Office Improved Business Practices



Case Study: TruGlo

Manufactures fiber optic sights for firearms, bows, etc

Problem

- Cost of mailing out invoices and quotes to customers was costly and inefficient

Solution

- Uses Paperless Office to email copies of Sales Order Invoices to customers as well as Sales Reps



Result/Pay Off for TruGlo

TRUGLO

- Huge savings on paper
- AR collections is speedier and more efficient
- Estimated 2000 invoices a month, saved a minimum of \$1,000/month in postage and FedEx fees for invoice delivery



Real Life Case Study where Paperless Office Improved Business Practices

Case Study: Controls International, Inc.

Sell and manufacture specialized valves for heavy industrial equipment



Problem

- Constantly having to acquire more office space to store a huge amount of paper generated for Journals and Registers printing
- Needed to email and fax acknowledgements to customers

Solution

- Implemented Paperless Office: Journals and Registers
- Implemented Paperless Office: Electronic Forms Delivery for Sales Order forms

Result/Pay Off for Controls, International



- Freed up an entire on site office that was used to store Sage 100 documents (and at the same time saw revenues increase 20%)
- Increased customer satisfaction
- Increased production efficiency
- More efficient customer service staff



Let's Take a Look at Paperless Office!





Go Mobile! - Learn how to easily and inexpensively access all of your ERP, CRM and BI information using your mobile devices

Join us for a Webinar on May 16

REGISTER NOW

Space is limited.

Reserve your Webinar seat now at:

<https://www.100tomeetings.com/register/191489248>

DM2 Software invites you to attend our "Go Mobile!" webinar on May 16, 2013 at 11:00am Pacific Time/1:00pm Central Time. Join Rob Pierce, DM2's Vice President of Professional Services, and Chris Lemortier, DM2's Vice President of Technology, to learn how you can start accessing your key Petroleum Insights financial/Enterprise Resource Planning (ERP), Customer Relationship Management (CRM) and Business Intelligence (BI) information using your mobile devices without the "doubt" or expensive software applications. DM2's mobile options will help you increase your productivity when you're out of the office. Join us to learn:

- What it means to "Go Mobile"?
- Why Go Mobile? - benefits of adopting a mobile strategy
- Does hardware really matter? - Smart Phones and/or Tablets - what devices make sense for your organization?
- When is an App an App? - apps, web apps, HTML5, CSS3 - what does it all mean?
- How to Secure Your Data - keeping your data safe from Hackers
- How to access your DM2 financial/ERP, CRM and BI data using mobile technology
- How to get started on your mobile initiatives

Who should attend?

- Owners and other Top Executives involved in developing your company's mobile strategy
- CEOs, Sales Managers and Business Line Managers looking to utilize mobile devices to increase productivity
- IT personnel involved in supporting your mobile infrastructure and technical requirements

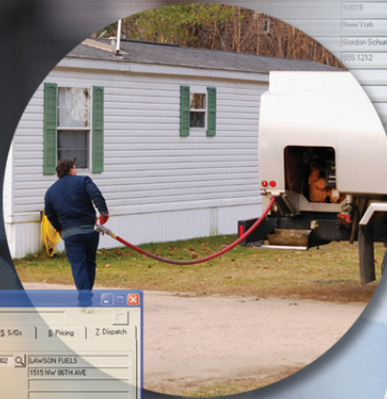
Attend DM2's "Go Mobile!" webinar to learn how easily and inexpensively you can access your key ERP, CRM and BI data.

Click here for a sneak peek at some of the benefits of Going Mobile!

Space is limited, so register today!

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Follow-up questions?
E-mail DM2 at: sales@dm2.com



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Vehicle Maintenance

Company: International Freight Company

Name: 11113 Mackinac Line

State: NY

City: Garden Schuway

Zip: 12512

Driver Card: [Blank]

Vehicle Class: [Blank]

Billing Cycle: M

Invoice Form: 80 COLUMN W/MFG

Sort 1: INTER

Sort 2: [Blank]

Type of Card: B

Fee ID: A1989

Group: NO GROUP

Price Level: 0

Price Table: [Blank]

Credit Limit: 00

Buttons: Validate, Accept, Cancel, Delete

AL FTN 10/07/2003

Inventory

Name: LAMSON FUELS

Address: 1555 NW 8TH AVE

City: VANCOUVER

State: WA

Zip: 98605

Phone: [Blank]

| Del. Status | Name | Item | QTY |
|-------------|----------|-----------------|------|
| OK | 488 | Castrol D-Dip | 200 |
| OK | 300.00 | Last D-Dip | 1000 |
| OK | 07/02/03 | Next Degree Dip | 1000 |
| OK | 300.00 | Write DO | 1000 |
| OK | 02/12/03 | Full Spang DO | 1000 |
| OK | NW | Locked DO | Yes |

Buttons: OK, Cancel, Print

DM2 | HOT | 03/13/2003

Assignment

| Task | Product/Order | Name | City |
|----------|---------------|--------------------|---------|
| 10000001 | 10000001 | SOUTHWEST TRUCKING | CHICAGO |
| 10000002 | 10000002 | SOUTHWEST TRUCKING | CHICAGO |
| 10000003 | 10000003 | JEFFERSON TRUCKING | CHICAGO |
| 10000004 | 10000004 | JEFFERSON TRUCKING | CHICAGO |
| 10000005 | 10000005 | JEFFERSON TRUCKING | CHICAGO |

Buttons: Assign, Cancel, Done

DM2 | FTN | 06/13/2003