Have VL open for demo

DOCUMENT MANAGEMENT

- Benefits – eliminates need to scan documents manually and attach in email
- Attach any document or image to a Maves eDocs document
- Edocs documents include:
  - Receipt invoice
  - BOL and Pick slip, Master bol
  - Invoices – accessorial and renewal storage
  - TMS Freight invoices, POD

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You all I think are familiar with edocs – either because you already are using it or have seen it on a demo/presentation we have done.

So I don't have to tell you that eDocs (electronic documents) are rendered as pdf, saved and are viewable in Highviews, also can be auto-emailed to your customer / designated email recipient. eDocs is what we use for all forms printing like invoices, bols etc.

Everyone has a document management system
Usually it involves printing paper, lots of paper!
Whatever happened to the paperless office?
Let's talk about paper and what happens to it

You're printing E.g. bol copies, invoice copies, receiving copies - how many copies?
What happens to these copies, do you really need them all?
I bet you have copies that say "FILE" on the bottom – the one you put in the filing cabinet

Click for first image

Oh, I know you encourage your staff to save paper, not print – maybe you do this
Click for second image

I want to a quick recap of what we call the Docstore Doc management system and bring you up to date on what is available today

Click
What I want to focus on are the documents that you attach to the primary Maves document – the carrier's copy, your customers paperwork, the signed bol etc.
In many cases you are not just filing these copies but you are also including additional documentation and in many cases scanning then, then composing an email and attaching the scanned copies – who is doing this?

Now, what if I told you that there was an easier way to do all of this attaching, scanning and emailing?
Would you be interested?

Click
The ability to attach any document or image to edoc

What is an edoc? What do we mean by this?

Click
Edocs include…

Note – Pick slip is a recent addition

DOCUMENT MANAGEMENT

- Manual attach
- Batch scanning
- View attachments in the Highview
- Auto email documents with attachments
- Document search

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Let's briefly review what we showed last year –for the benefit of those who have not seen this - the manual attaching of documents

Then will review batch scanning and what has been done

Auto emailing documents isn't a new thing as such – you can auto email any edocs document – eg. Invoices

Doc search – Tim introduced this already

DOCUMENT MANAGEMENT

- Demo of manual attach

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To set the stage – you have documents e.g. receipts and you want to attach other paperwork – drivers bol, customer paperwork and file them together for easy access

Let's go

You have the ability to select a specific document eg. an order, receipt, invoice then attach a document that you already have saved

To View - in the highview see the Attachments column which will tell you if you have documents and how many

Actually it will tell you how many attachments you have, you select then it will list them all and you can view e.g. as pdf
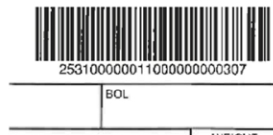
Demo of this

DOCUMENT MANAGEMENT

- Batch scanning
  - eDocs prints smart barcode
  - E.g. POD print in TMS

Attachments

eDocs

2531000000011000000000307

BOL

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Of course, this only works if you have something specific to attach to an individual document, you won't want to attach want to do this for hundreds of documents using this method

For DM to work you need a barcode – not just any barcode but a specific ID that is printed by the system

This is a unique ID and this would be configured to print on your document – e.g. invoice, BOL etc.

This id is linked to the document itself

So we have the edocs document with the barcode and the attachments that we want to scan

next
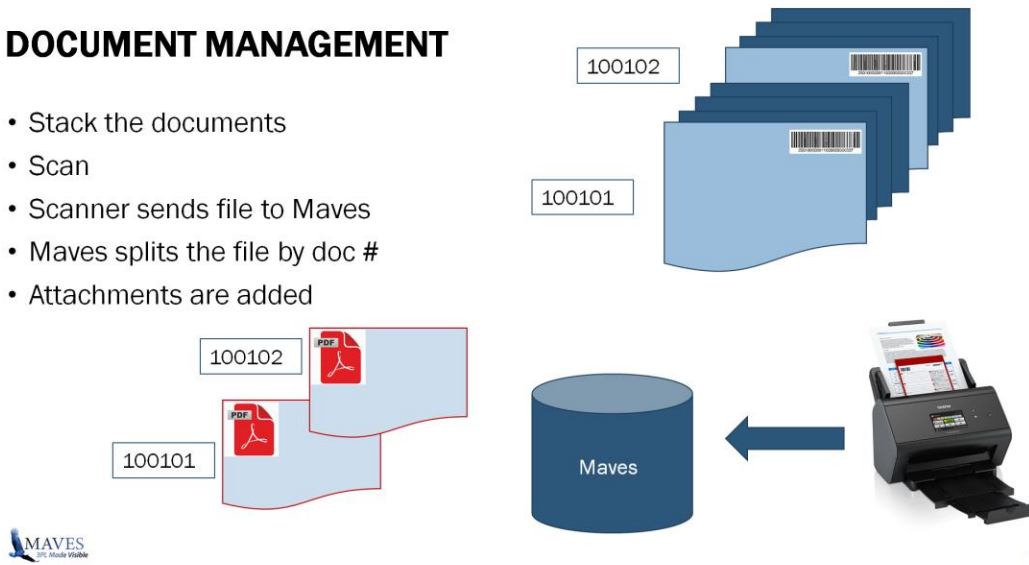
We have the stack of documents separated by 2 edocs documents – we load them into the scanner

Click
Scan

Click
the scanner is configured to drop the scan to a specific folder (mapped drive) that the Maves system sees. The file is a pdf (one large one) –recommend a 300dpi max setting on the scanner

Click
Maves reads this file and based on the barcode it splits the file from the scanner into one pdf per Maves document

Click
We get 2 pdfs which are now available in the Highview

The benefit of this is that you can have 20, 50 + edocs documents in this stack

(limited by the scanner input tray)

Error checking
We have a log file that tracks what happens to each scan. For instance if it can't read the barcode etc.

In TMS Higvhiew in attachment column we see there are 4 attachments
Click to get arrow

Then we click on the Docs link and a new screen displays

Click
Showing each document

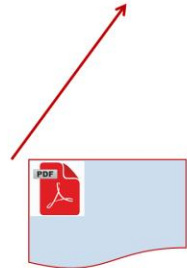Click the document itself to see it rendered on the screen

Click

Auto emailing isn't new – a system feature for a few years now

Setup the email in CC16 / CC17 – setup the clients that you need to only, as well as internal users who want to get copied
Click
E.g. your receipt, invoice

Who is using this today eg. emailing invoices?

What we heard from our customers was that when they send emails manually they may need to attach other documentation – carrier paperwork etc. so the auto email function wasn't very useful because it only sent the primary document.

Click
Now we have the ability to include attachments to the email

This is not currently a user setting – you have to ask us to configure this – it is document type specific

If there are attachments they will be sent along with the edocs document

Do you see a use for this? Examples?
Would it save you time and money?

Click

Project we did with Star Distribution – involved the Proof of Delivery (POD). In the TMS system there is only one primary document that continues throughout the whole dispatch and billing process – the probill number. Various documents are printed for this same probill number – one of these is the POD – what the driver takes with them as a delivery ticket. The consignee (person receiving the goods) signs this document signifying that they have received the goods.

Historically, this document was signed by the customer then scanned into the system and manually emailed to the customer together with the invoice.

Josh to add comments

Setup

Manual attach already there as part of base software

Batch scanning – requires mapping scanner, also we would need to configure the email to include attachments – there is no user setting for this currently

Other edocs

In order to make this possible for WMS documents we still need a way to create the barcode

One option is to print a cover page needs to be created for accessorial , receipt and bill of lading
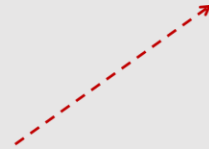
Eg. for accessorial invoice you would create the invoice, run a print program that prints just header information and the barcode

You can then use this for scanning attachments, then you would run your normal invoicing print program e.g. IP53

alternately

We need to separate the print from the email

Currently when you print and have CC17 setup to email this goes immediately
This may not always be preferred
If attachments needed they could be printed later and email sent after that
Also, if you would prefer the system to combine attachments and send only one this could be made possible
What if attachments are mandatory ie. don't send the invoice unless there is an attachment?

DOCUMENT MANAGEMENT

• Demo of Doc Search

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Why was this done?

Search a unique ID – lot number, order number, container number, your client's reference number etc.

THANK YOU

✉ INFO@MAVES.COM

✱ HTTP://WWW.MAVES.COM/