



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

DOCUMENT MANAGEMENT

- Select the order, Attach Docs
- View attachments

The screenshot displays the MAVES software interface. At the top, there's a navigation bar with tabs: 'Outbounds WIP', 'Outbounds QRY' (selected), 'Outbound Stock', 'Outbound Units', 'Outbound Convs', 'Shipment Track', and 'RF Operators'. Below this, a 'List CMD's' panel is open, showing a table with columns: 'Whs Ref', 'Client', 'Client Ref', 'Cust Ref', 'Warehouse', 'BOI Form', 'Attachments', 'Stock', 'Conveyances', and 'Unit IDs'. A yellow arrow points to the 'Attach Docs' button in the 'List CMD's' panel. Another yellow arrow points to the 'Attachments' column in the table, which shows 'Docs [1]'. A pop-up window titled 'Attach' is visible in the top right corner, showing a list of documents to attach.

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

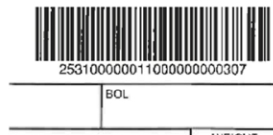
DOCUMENT MANAGEMENT

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

Attachments



eDocs



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.

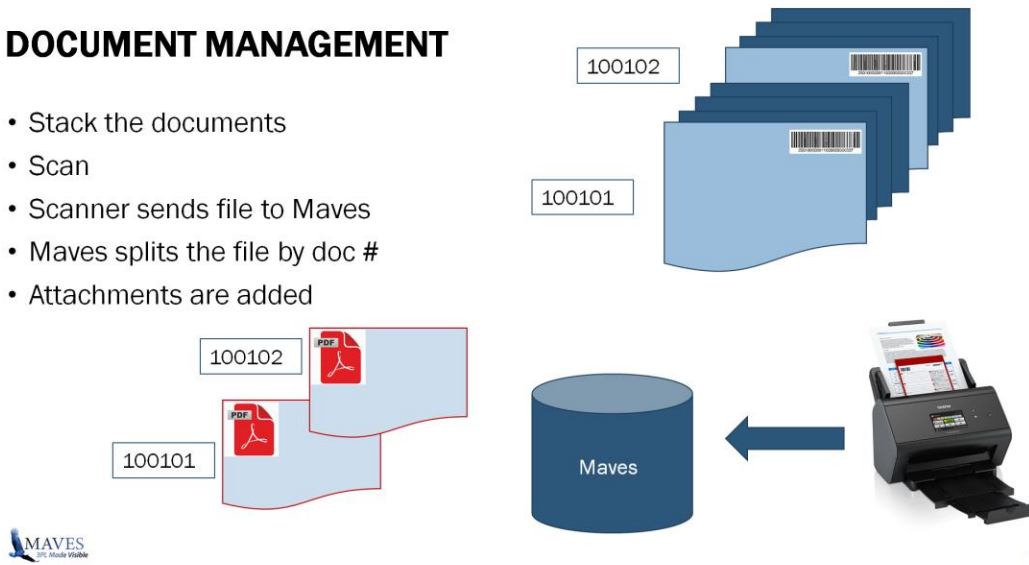
This id is linked to the document itself

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

next

DOCUMENT MANAGEMENT

- Stack the documents
- Scan
- Scanner sends file to Maves
- Maves splits the file by doc #
- Attachments are added



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.

DOCUMENT MANAGEMENT

- View attachments in Highview
 - Summary view
 - List attachments
 - View



ProBills

ProBill History ActionGrid

Preferences Panels Actions Commands Specials Spreadsheet XML

Pick-Up Delivery Financial Dispatch e-Docs Record Key

Invoice	Client	Invoice	Attachments	Unique Key
S20183416	SUBZER	S2-SUBZER-PBS-S20183416	Docs [4]	S20183416

Hyperlink - From: ProBill History ActionGrid - To: VL Documents

Preferences Panels Actions Commands Specials Spreadsheet XML

Query Columns Rows MyViews: BASE BASE BASE

Doc Ref	Doc Title	Client	Trans Type	Trans #
61938.pdf	Dock Pro S20183416		Pro Bill	S20183416
61932.pdf	Dock Pro S20183416		Pro Bill	S20183416
62052.pdf	Freight Invoice S20183416		Pro Bill	S20183416
62058.pdf	Dock Pro S20183416		Pro Bill	S20183416

In TMS Highview 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

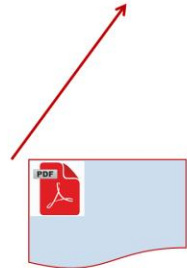
Click

DOCUMENT MANAGEMENT

- Auto-Email
 - CC16 Address Book
 - CC17 edocs specific
- If attachments exist system can be configured to include them in the email
- TMS Signed POD

Company	Address Book Code	Description
L1	BL14	Freight Invoice

Company	L1
Address Book / Job	BL14
Identifier / Client	00001
Description	test account
Address List	rForkun@laves.com



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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

DOCUMENT MANAGEMENT

- Setup/Configuration
 - Manual attach
 - Batch scanning
- What about other edocs?
 - Accessorial invoice
 - Receipt invoice
 - Bill of Lading



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

DOCUMENT MANAGEMENT

- Barcode Cover Page

A template for a document cover page. It features a light blue rectangular area on a white background. In the top right corner of the blue area is a barcode with the number 2531000000110200000000007 below it. Below the barcode is a white table with four rows and two columns. The first row contains 'INVOICE NO.' and 'D119309357'. The second row contains 'INVOICE DATE' and '03.22.2019'. The third row contains 'TERMS' and 'NET 30 DAYS'. The fourth row contains 'PAGE' and '1 of 1'. The blue area has a wavy bottom edge. The entire template is set against a light gray circular background.

INVOICE NO.	D119309357
INVOICE DATE	03.22.2019
TERMS	NET 30 DAYS
PAGE	1 of 1



One option is to print a cover page needs to be created for accessorial , receipt and bill of lading

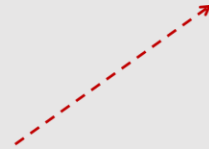
Eg. for accessorial invoice you would create the invoice, run a print program that prints just header information and the barcode

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

alternately

DOCUMENT MANAGEMENT

- Future development
 - Separate print from email
- Attachment configuration



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



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[HTTP://WWW.MAVES.COM/](http://www.maves.com/)