



Output Manager

WHAT IS OUTPUT MANAGER?

Output Manager automates the document delivery process. The module automatically delivers documents to business partners or employees based on preconfigured routing rules.

If your process requires the delivery of backup documentation (like receipts, terms and conditions, or datasheets), the add-on Supplemental Documents module can use business rules to retrieve related documents and automatically collate them with the master document before delivery.



COMMON USE: AR INVOICES

The single most popular use is with Accounts Receivable, predominantly to send invoices and statements quickly, followed by order acknowledgements. It allows your team to automate the collections process, improve cash flow, increase customer satisfaction, expedite DSO, and lower costs.



COMMON USE: SALES DOCUMENTS

Being able to select the document format, method of distribution (email, fax, print, etc), and timing each recipient receives based on individual preference allows for early demonstration to prospects of your team's customer service capabilities. Send proposals to start and follow with order statuses and confirmations.



COMMON USE: INTERNAL FILES

Support internal company needs in multiple departments by automating the delivery of crucial personnel documents such as benefit enrollment agreements and detail sheets, expense reimbursements, annual corporate reports, and more. Output Manager allows for personalization and cover sheet creation as well.

HOW CAN IT HELP MY BUSINESS?

Any company that routinely distributes documents to business partners or employees will benefit from automated delivery. If your users also have to manually retrieve, copy, and collate backup documentation before delivery, the time savings after automation will be even greater.



HOW DOES IT WORK?

DETERMINING THE RECIPIENT

Use information from the document to determine the appropriate recipient(s). Preferences can be configured in Output Manager or the module can utilize recipient information already in your ERP/ business system. In that case, modify documents to contain the recipient's email address or fax number on the document – no further recipient setup is required.

DELIVERY METHOD

Deliver documents using email, fax, file copy or FTP. If the recipient wants to receive a hard copy, Output Manager can print to a printer. The delivery method is based on the recipient's preference.

WHAT GETS DELIVERED

- **Master Document:** Deliver the document in native format or convert scanned TIFFs to PDFs
- **Document Metadata:** Include an XML or CSV file with document property values if the recipient would like to receive document metadata to automate document processing
- **Cover Sheet:** Configure a text or HTML cover sheet to notify recipients of documents being delivered and include document metadata in the cover sheet
- **Supplemental Documents:** Automatically retrieve related documents that are collated with the master before delivery by using business rules to save time in manually pulling paper files, making copies, and manually collating

WHEN IS IT DELIVERED

Delivery schedules are configurable. You may have recipients that receive large volumes of documents and only want to receive them once a day. Others may need their documents to be delivered immediately. Specify these frequencies at the recipient level.

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