Infotech Paperless Office
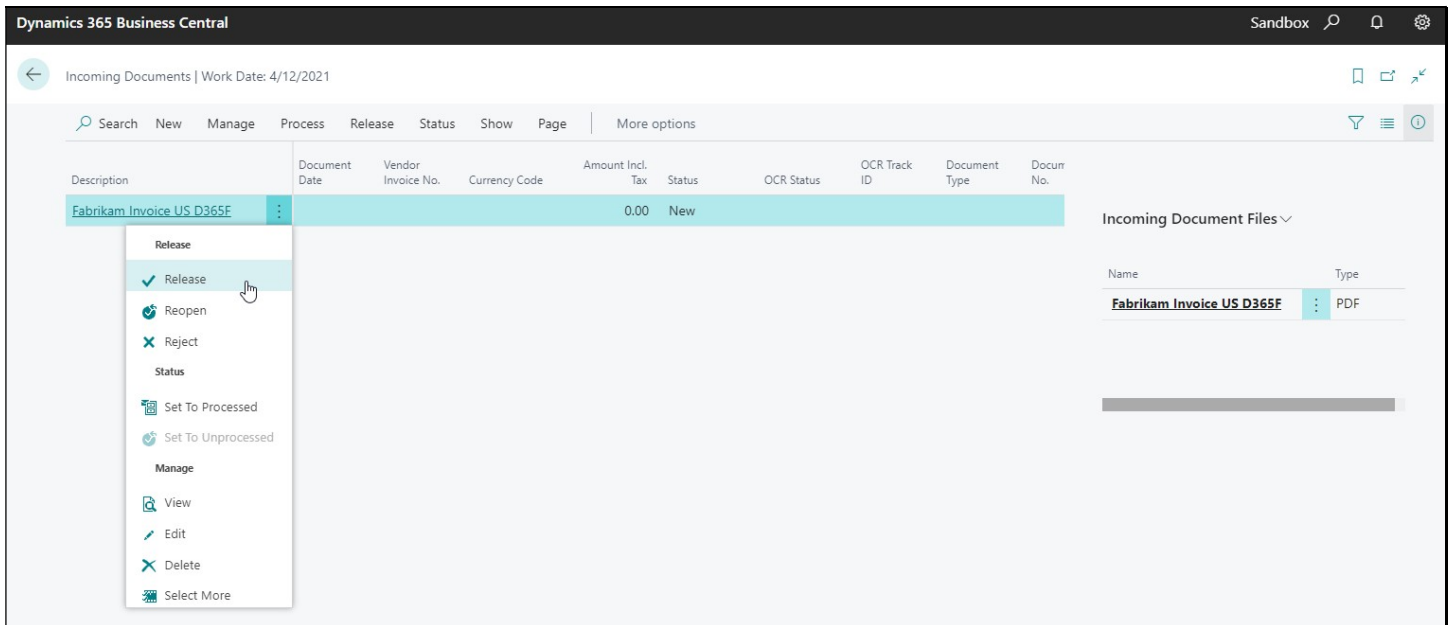
Introduction: Infotech Paperless Office brings together many technical capabilities to minimize or eliminate paper in the workplace. Scanning and attaching documents; E-mailing documents, quotes, reports, order confirmations and invoices/credit memos; Automating payments; and Excel imports and exports all combine to result in a significant reduction in the use of paper. Workflow can automate the business processes utilized, and provide notifications, approvals and escalations, without paper, to enable required actions.

Included in Business Central:

Microsoft Dynamics 365 Business Central is an all-in-one business management solution that helps businesses manage financials, sales, service and operations easier and faster. It integrates with Microsoft Office 365 to connect business processes and personal productivity bringing insight and efficiency to daily tasks. Business Central is a web-client system, but also supports dedicated apps for mobile devices to provide remote activity.

> Refer to Microsoft eBook: "Reinvent business productivity with Microsoft Dynamics 365 and Microsoft Office 365" (http://www.infotech-inc.com/wp-content/uploads/2021/04/ReinventBusinessProductivitywithDynamics365andOffice365eBook.pdf)

To record an external document in Business Central, you must first create or complete an "Incoming Document" record. You can do this manually, or you can take a photo of the external document and then create the incoming document record with the image file attached.
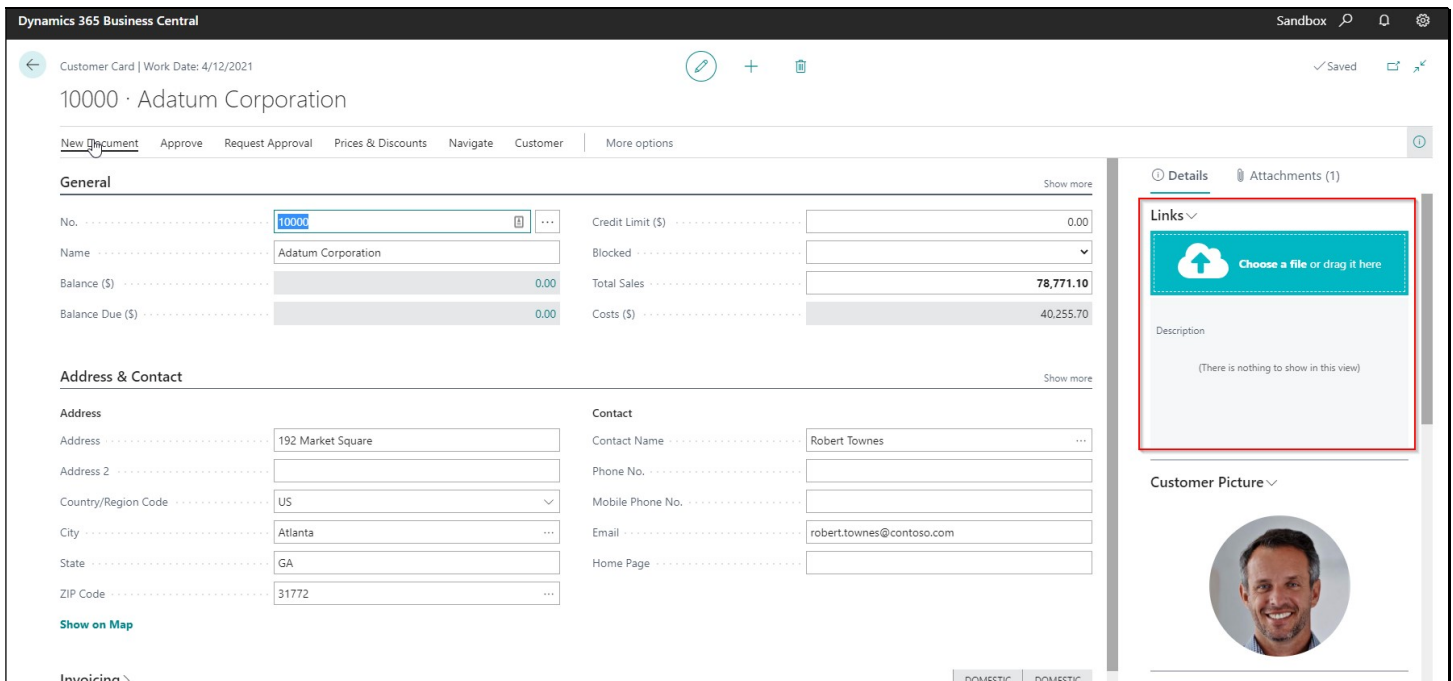

From PDF or image files that you receive from your trading partners, you can have an external OCR service (Optical Character Recognition) generate electronic documents that can be converted to document records in Business Central. For example, when you receive an invoice in PDF format from your vendor, you can send it to the OCR service (provided by Kofax ReadSoft Online) from the Incoming Documents page. After a few seconds, you receive the file back from the OCR service as an electronic invoice that can be converted to a purchase invoice for the vendor.
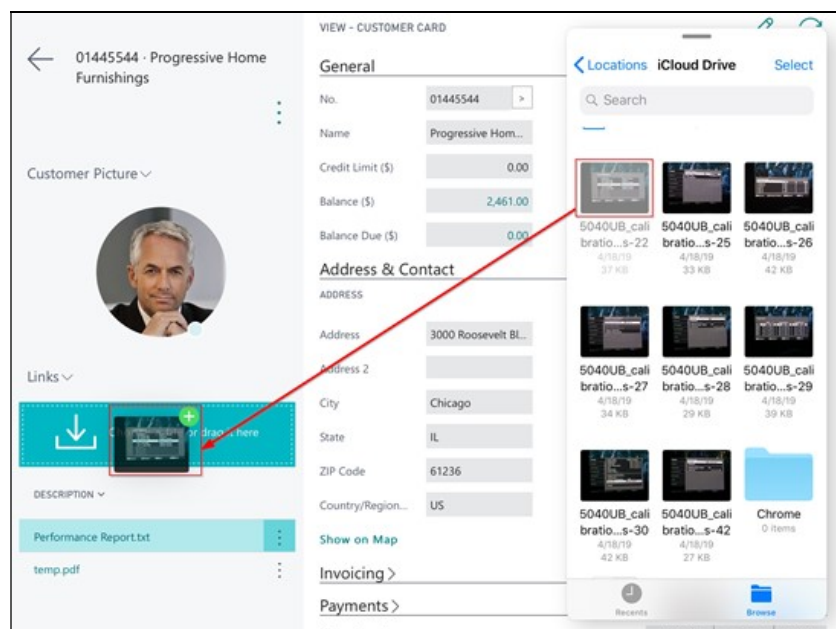
As an alternative to creating and sending the file from the Incoming Documents page, you can also send the file to the OCR service directly by email. Then, when you receive the electronic document back, a related Incoming Document record is automatically created.

https://docs.microsoft.com/en-us/dynamics365/business-central/across-process-income-documents
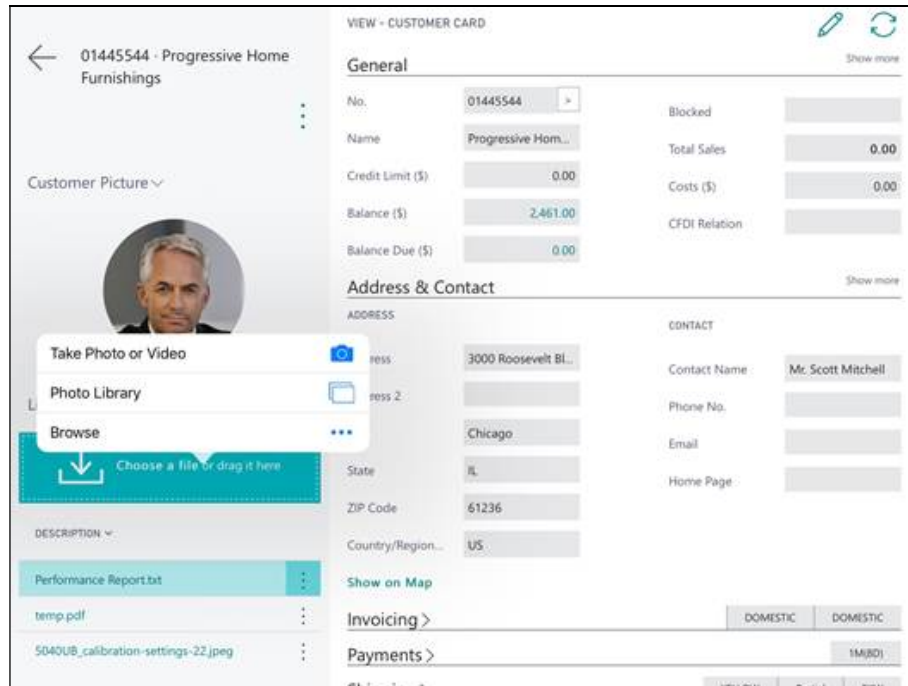
Infotech Document Management Extension:

The Infotech Document Management Extension allows you to drag-and-drop files and emails directly into your Business Central database and also stores the file on a cloud repository for easy access elsewhere in your organization. With Infotech's added Page Pack, the extension has been added to most pages (cards and lists) in Business Central, so you will always have the right attachments available when you need them. Attachments will even travel with documents through the system, so if you add an attachment to a quote, it will stay with that document as it becomes an order, shipment and invoice.

If you are on your tablet or other mobile device, you can drag-and-drop files from the Files app on the device, and just like on the web client, these files will be stored centrally on the cloud for easy record keeping and collaboration:

And if your device has a camera, just tap on the drag-and-drop bar, select "Take Photo or Video", and have it directly uploaded into the system as well:

Additional Third-Party Tools:

In addition to the capabilities provided in Microsoft Dynamics 365 Business Central and the Infotech Document Management extension, there are third party tools that can further expand the paperless office environment.

Infotech will assist in identifying any third-party applications that would be required to support additional requirements.

Kofax ReadSoft Online - Cloud based invoice processing

With Kofax ReadSoft Online you will be able to instantly access invoice data, 24/7, monitored round-the-clock by cloud operations team to handle any and all invoices. Kofax ReadSoft Online doesn't require expensive hardware or software investment, so set up is easy, fast and painless.

https://store.readsoftonline.com/Solution/dynamicsnav

Summary

A paperless office affords tremendous opportunity in time savings, equipment, paper and space savings, and information accuracy and availability. Infotech will work with you to identify the level of "paperless" that makes sense for your business, and will then architect a solution to fit your goals and objectives, taking into consideration the cost and benefit of the elements of the solution.

For more information, or to schedule a personal demonstration, please contact us directly, either via the website CONTACT button (http://www.infotech-inc.com/contact), or to our e-mail at mailto:information@infotech-inc.com.