

Sample Process for Sales Order Entry:

- 1** Receive a customer PO via fax, email or mail.
- 2** By using workflow, view the PO in the *doc-link* viewer while entering the order into Microsoft Dynamics.
- 3** When the order is saved with Microsoft Dynamics, *doc-link* automatically indexes the customer PO with all of the order information and the next customer PO is displayed in the viewer for entry.
- 4** The sales order is “printed” to *doc-link* for permanent archival in the *doc-link* repository. Users throughout the organization – and even the customer – can be granted access to the document. By having all documents related to an order or customer file in the same repository, sales reps and customer service staff are able to answer questions on the first call.
- 5** *doc-link*’s Output Manager can be configured to automatically route the order acknowledgement to the customer by email, fax, standard print or FTP based on their preferences.

In addition, *doc-link* is integrated in a similar fashion with the quotation, delivery and AR invoice screens to automate those portions of the sales process as well.

