



**Life hacking
your business:**
Take back
the day with
automated
document
and workflow
management.



How much more valuable would you be to your organization if you could free up several hours a day to do more strategic things?

How would you spend that time? Negotiating a contract with a key vendor... or analyzing profit margins... or reviewing the project plan for your new CRM system... or improving your employee recruiting systems and processes. Now THOSE are activities worthy of your time!

So what's holding you back from spending your time on the important stuff? Oh, right... you need to track down that missing Acme invoice... or remind the department managers to approve expenses for this month... or document employee pay raises in a manual corporate form, or process new employee onboarding documents.

Isn't it time to take back control of your day?

You don't have to be burdened by document clutter and archaic processes anymore.

There are easy, affordable life hacks for your business that will put you back in control of your time. Read on to see how you can:

Slash the chaos in your business processes >

Organize your digital assets >

Untangle your workflow >

Seize the data >

Slam dunk accounts payable >

What is life hacking?

According to Wikipedia, life hacking is "any redundant trick, shortcut, skill, or method to increase productivity and efficiency, in all walks of life; i.e., anything that solves an everyday problem in a clever or non-obvious way."

So there you have it. Life hacks are clever solutions to everyday problems that let you focus on the more important things in life.

Like growing the business.





The average
person checks
his or her phone

150
times per day



Slash the chaos in your business processes

We've clearly not achieved the paperless office that we were promised decades ago. What's worse, in addition to paper, we've got digital documents and a flood of electronic communications coming at us from all directions 24x7 and no obvious way to bring order to the chaos of information overload.

Maybe that's the reason everyone is drawn to their smart phone. It's become the universal band-aid for broken processes. On average, we check our smart phones 150 times each day for information and communications. The trouble is, too often smart phones are used to react to problems. They rarely give us control or the ability to focus on proactively getting out in front of our work.

Just like the paper which tends to clutter up our desks, or the emails that flood our inboxes, smart phones coupled with the distracting habit of multi-tasking are indicative of broken business processes.

At some point, haven't you thought to yourself... *"Why is this process so messed up and how can it be fixed?"*

Automate the Routine and Focus on Exceptions

To deliver a complete solution to the problems that plague most document-burdened processes in your organization, an effective document management system needs to do more than simply turn paper documents into digital files. It needs to capture and manage ALL documents as digital assets which can be easily organized and accessed in the context of a business process. It needs to handle routine tasks automatically – like routing data and documents for review and approval based on established business rules. Or, creating a business transaction in your ERP system at the end of an approval process so that data doesn't need to be re-entered. It needs to monitor approval processes so that someone doesn't have to worry about a decision or transactions slipping through the cracks. It needs to deliver self-service of information, so that everyone (employees, customers, partners) are all on the same page.



The benefits to the business of digitizing documents AND automating processes are profound:

- Significantly reducing distractions related to inquiries for things like transaction approvals, contract administration or compliance auditing
- Dramatically reducing manual data entry and related errors
- Broadly increasing process visibility and delivering self-service so everyone has the information they need, whenever they need it
- Automating workflow using intelligent business rules so the majority of decisions don't require manual intervention and create more distractions

Sound too good to be true? The truth is, your organization likely has MOST of the elements you need to get there. The missing ingredient is a system that brings your data and documents together and makes them accessible when and where you make business decisions or process transactions.



While **44%**
of invoices arrive
as electronic
(PDF, Fax, EDI)
documents

59%
will end up
being printed
anyway

Source: 2013 Internet Trends





Organize your digital assets

There was a time when we thought more data would provide the answer to everything. WOW! Be careful what you ask for right?

Data and electronic documents don't help anyone when it's hard to find what you need, when you need it. Keyword searchability and the logical organization of your documents is critical. And, you have to be able to limit access to sensitive data while keeping it simple for authorized people to get what they need.

Across the organization, from Finance to HR to IT, productivity will soar when your digital assets are well managed in a central location.

Take full control of all your resources

In the best of all worlds, access, security and governance of the data and documents associated with your business should be easy to manage. With control over digital assets, you can:

- Provide visibility across business processes to get the full story before making a decision.
- Design workflows which tap into the knowledge contained in your documents
- Ensure compliance and auditability without spending endless hours searching for the right document.

Think of it as spring cleaning for your digital assets. A fresh start for your employees will help them breathe easier.

Every **12** filing cabinets
require an additional
employee to maintain

Source: The Paperless Project



5



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Untangle your workflow

Putting documents at your fingertips is just the beginning. To truly transform your business, you have to get your data and documents to do the work for you – with automated workflow.

You're constantly bombarded by competing priorities. Most people respond by trying to multi-task, which means lost concentration & creativity, dropped balls, mistakes and wasted time.

Automated workflow which drives business processes helps employees take back control of their day. Instead of wasting time trying to keep track of "who has the ball," you can rely on workflow automation to route documents and data to the right people at the right time – sending alerts, reminders and escalations when necessary. Automated status reports keep everyone on the same page and everything flowing smoothly, so no one has to scramble to update your executive team or respond to a routine vendor query. Fewer emails, fewer phone calls and more self-service means fewer interruptions, greater productivity and happier employees, customers and vendors.

Maintain focus and eliminate interruptions with workflow automation

Manual business processes slow down every aspect of your organization, from Finance and Human Resources to Manufacturing and Contract Management. Logical business processes, driven by automated workflow tamp down the distractions and shore up the productivity.

Workflow automation allows your people to reclaim their time by:

- Helping themselves through secure access to supporting data, documents and decisions.
- Reducing/eliminating routine or redundant manual tasks like data entry.
- Trusting a system which provides built-in accountability and bottleneck circumnavigation.

Distractions don't have to be a way of life.



It takes more than **25** minutes on average, to resume a task after being interrupted

Source: The Paperless Project

2/3

of businesses
adopting paper-
free processes
report a
payback within
18 months



Seize the data

Documents are the life blood which informs all the processes of your business and contains critical data which supports your organizations transactions. Too often, that data has to be manually entered into your transactional systems. When data is locked up in documents or separated by departmental silos, it's not actionable. It's tough to stay ahead of the company's spending habits or your business results when you don't have the full picture.

Enterprise document management will help you tap into the data you are missing today to fill in the blanks.

Capture the full potential of your data

Through automated document management, you can:

- Capture and automatically route documents to assign them for indexing and approval
- Automate and intelligently extract relevant data from paper and digital documents
- Extract actionable data from your digital forms

Through integration of enterprise document management with your ERP system, you can:

- Instantly access scanned paper or digital documents from within your ERP system
- Automatically route documents and collect data and approvals online or via email
- Automatically create transactions in your ERP system from documents and related data



Slam dunk accounts payable

As your company grows, processes get more complex. Purchasing and Accounts Payable are the quintessential examples of this. More requisitions to review and approve. More purchases to track and match. More goods and services to receive and verify. More approvals to initiate and chase down. More invoices to process and pay. More checks to cut and mail. More transactions to audit and support. More G/L codes to create and segment. More journal entries to review and adjust. Of course, it's expected that all the work will get done with the same sized staff right?

Give your AP team some needed help

No other department in your organization has to deal with as much data, as many documents and as many transactions as the accounts payable team. They have to interpret invoices that come in every form from FAX to EDI.

Once the inbox is sorted out, there is the approval process... The stacks of invoices sitting on managers desks, lost in the sea of paper. Running around the office being the "bad guy" who pesters the management team to approve and code their invoices. Fielding angry calls from vendors who just want to know when they're getting paid.

There is definitely a better way. AP automation takes the pain out of both the incoming chaos and the approval bottlenecks to:

- Reduce the time wasted keying invoices from vendors.
- Allow AP folks to focus on handling exceptions quickly rather than tracking down lost or unapproved invoices.
- Reflect accurate outstanding payables on the books.

Help your AP team take back control of the purchases and spending that keep your business growing. Let them focus on controlling costs instead of tracking down paper and badgering approvers.

Once you've gotten a handle on AP, you can apply the same process to other document-burdened departments and empower them to achieve new levels of productivity. The possibilities are endless.



A typical employee spends

30-40%

of his or her time looking for information locked in email and filing cabinets

Source: The Paperless Project



Ready to hack?

With the KwikTag document management system, you get one integrated solution that manages every document, every department and every business process within your organization. In just a matter of days, you can be saving time, minimizing interruptions and getting your business under control.

KwikTag makes life easier for organizations that use Microsoft Dynamics
We're all about working with Microsoft Dynamics ERP.

GP

SL

NAV

AX

80% of KwikTag customers achieve ROI in less than a year

50% achieve ROI in less than 6 months*

*Exceeds industry averages by 300%

Whether you are looking to improve Accounts Payable, Accounts Receivable, travel and expense reporting, Human Resource documentation and workflow, OR a challenging process unique to your organization or industry, KwikTag has a solution that can help.

Simplify your work life and gain control over your business operations. Hack through repetitive, manual tasks and document clutter. Automate document and data workflow.

Focus on your strengths and let KwikTag handle the rest.

Get an **online demo** today!

