

Sage ERP Solutions

The New Smart Form Toolkit

With this new Smart Form Toolkit, you will be able to configure Smart Forms without custom development. That means a more affordable – and quicker – way to get your own Smart Forms that can be used to create documents, index documents, or streamline business processes.

The Smart Form Toolkit ships with two Smart Form plug-ins:

- Document Creation – Users can create documents that are indexed and submitted directly to the Sage ERP Document Management by Altec repository. The user can also browse to related files and index them into Sage ERP Document Management at the same time.
- Processing – Users can enter information into the Smart Form to assist in the processing and/or indexing of a Sage ERP Document Management document. In addition, the user can easily see a list of related documents.

And if you already have a GL Smart Form or a custom Smart Form, don't worry. The new toolkit will not modify or impact those Smart Forms in any way.

Smart Forms work with:

- Any Department
- Any Process

Examples of Smart Forms:

- Expense Reports
- Credit Card Reconciliations
- HR On-boarding
- New Vendor Requests
- Check Review Process
- Check Requests
- Requisition
- Purchase Order

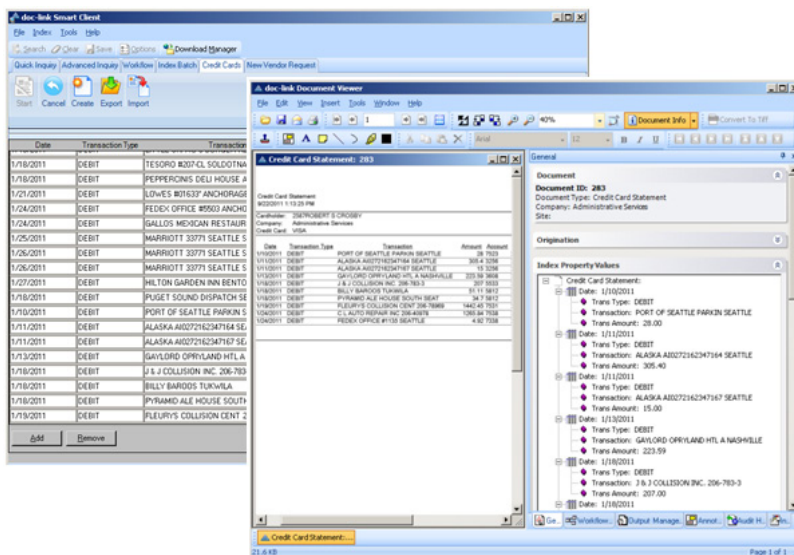
Examples of Document Creation Smart Forms

Credit Card Statements

Many credit card companies allow the user to download credit card activity in CSV format. This electronic version of the credit card bill can then be used for individual approvals and coding. While this is easier than distributing paper copies of the statement for approval, it still results in duplicate data entry and can be a time-consuming process.

The Smart Form Toolkit's document creation plug-in can be used to create a Smart Form that imports the CSV data and creates individual statements for each cardholder. The statements are indexed into the Sage ERP Document Management repository and a GL Smart Form can be used to approve and code each line on the individual statements.

The user presses the Import button on the Smart Form and browses to the CSV file. The credit card information is imported into the detail section of the Smart Form. The user then presses the Create button and credit card statements are created for each user.

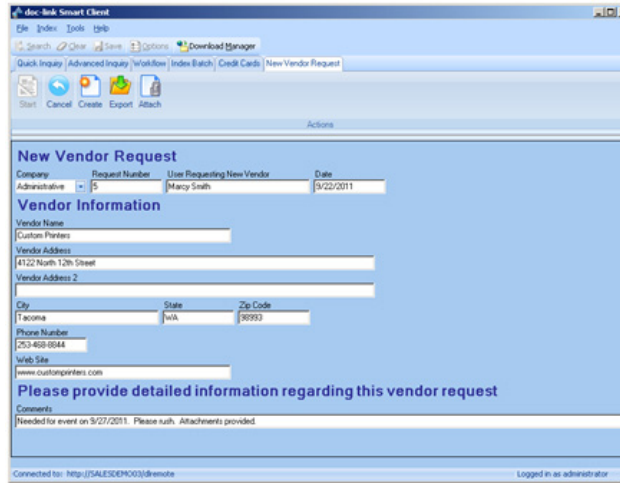


Screenshot of Credit Card Statements Processing

New Vendor Request

When approving vendor invoices, it is sometimes necessary to request setup of a new vendor. With a document creation Smart Form, the user can be prompted to enter the necessary information and can even link related backup documents to the request by pressing the Attach button and browsing to the related files.

The request and related documents are indexed into the Sage ERP Document Management repository when the user presses the Create button. The request can then be routed through Sage ERP Document Management workflow for approval.

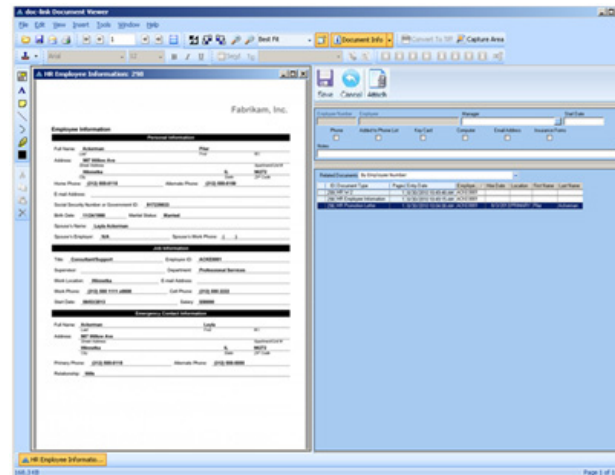


Screenshot of New Vendor Request

Examples of a Processing Smart Form

On-boarding

The process associated with employee on-boarding may have many steps and associated documents. The user can enter and track data on the Smart Form as well as see and view related documents. The user can also press the Attach button to index additional documents into Sage ERP Document Management.



Screenshot of On-boarding