# Spindle
# Document Management

Spindle
Document Distribution

Spindle
Document Capture

# Electronic Document Management
## for Sage 200

DRAYCIR®

# Why Spindle
# Document Management?

Giving you total control of your documents in Sage 200, Spindle Document Management is an essential solution for growing businesses.

From distributing your outbound documents and automating many of your workflow processes, to capturing incoming documents for access instantly in Sage 200, Spindle Document Management provides you with a complete document management solution for your business.

## Say **goodbye** to...

Risk of human error in processing, sending, receiving and filing documents.

Time consuming manual processes.

Risk of missing or lost documents.

Document duplication and task repetition.

Unnecessary postage, stationery, labour and storage costs.

## Say **hello** to...

Documents and communications generated using real-time data from Sage 200.

Quicker document delivery and file retrieval.

HMRC compliance with digital document delivery and storage.

Seamless integration with Sage 200.

Quick return on investment.

Visit
**draycir.com/sdm**
for more detail

![Spindle Document Distribution]

# Distribute outgoing documents

By electronically managing your outbound document workflow processes, you will reduce the time you spend processing paperwork and can focus more of your time on other tasks.

Not only will it streamline and enhance your processes, you will have peace of mind that your communications are accurately delivered - to the right people at the right time.

## Spindle Document Distribution works intelligently in the background to:

- Send all your documents out, in batches or individually, via email or to print for sending by post.

- Generate beautiful looking documents with your branding and include relevant information, instead of plain Sage templates.

- Attach any related documents or a second page such as terms and conditions and add promotional messages to emails.

- Use across your organisation to distribute any type of document; Finance, Human Resources, Operations and Marketing.

- Keep your colleagues in the loop by sending a notification by email when a document has been sent.

- Minimise risk of document fraud with password protected and/or digitally signed documents.

- Get paid faster by adding 'Pay Now' buttons to invoices. Your customers can securely pay you online using your chosen payment provider Sage Pay (UK) or WorldPay.

- Instantly archive all outgoing documents for viewing on the relevant Sage 200 entry.

**Spindle**
**Document Capture**

# Capture incoming documents

We understand that life is busy and your time is precious. Too precious for paperwork. So why not let Spindle Document Capture reduce your workload and ensure all your important business documents are always to hand.

Designed to work seamlessly with Sage 200, Spindle Document Capture scans, imports and archives all your incoming documents. Every document captured is linked to an entry in Sage 200, so you and your colleagues have instant and secure access to documents.

**By electronically capturing incoming documents you can:**

- Capture any type of file for viewing in Sage 200, including documents, photos, emails, spreadsheets and many more.

- Batch scan documents using barcode technology, including multi-page documents.

- Quickly drag-and-drop electronic files into the Capture screen or Pending Tray.

- Add security permissions to limit access to sensitive documents.

- Use a unique barcode to quickly associate documents for scanning to their relevant Sage 200 entry.

- Store documents in PDF/A format to comply with HMRC regulations.

- Enable non-Sage users to capture documents into the Pending Tray.

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**Spindle**
**Document Capture**

# View documents in Sage 200

Organised admin is essential to the success of your business. Having secure access to every document when and where you need it helps you to be more efficient – and provide a better service to your customers.

With no need to open a different application, let alone leave your desk, you can instantly view captured documents directly in Sage 200.

**All captured documents can be securely accessed throughout Sage 200:**

- **Sales Ledger** View related customer documents on the account and transactions.

- **Purchase Ledger** View related supplier documents on the account and transactions.

- **Nominal Ledger** View sales and/or purchase invoices and other related documents against a journal entry.

- **Cash Book** View bank statements, correspondence and any receipts and payments related to a transaction.

- **Stock Control** View product specification documents and certificates of conformity associated to a specific batch or traceable item.

- **Sales Order Processing** View all documents sent out to customers (by Spindle Document Distribution).

- **Purchase Order Processing** View all documents relating to supplier orders.

- **Project Accounting** View receipts associated to expense claims and timesheets relating to projects.

**For users without access to Sage 200, captured documents can be securely accessed:**

- **Using the Document Search Tool** Search with the document number, transaction type, date and more.

> "It is simple and easy to use and has helped us save a significant amount of money. Now everywhere that I can see the transaction in Sage 200, I can instantly find the documentation."
>
> **SNF (UK) Ltd**

**Spindle**
**Document Capture**

# Capture documents on the go

Using your mobile phone to capture documents is a trend that is likely to increase over the next few years*. How could mobile capture help your business?

The Spindle Document Capture app can help you by capturing images of your documents and send immediately back to the office over a Wi-Fi, 3G or 4G connection.

**The Spindle Document Capture app is available for iOS and Android devices, and can help you to:**

- Send signed delivery notes back to the office.
- Send related expenses whilst on the job.
- Sales orders can be sent to the office for processing.
- Record evidence of faulty/damaged delivered goods.
- Use as an alternative to a traditional scanner when working from home or out of the office.

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for more detail

*Infotrends

Download on the **App Store**

GET IT ON **Google Play**

The Spindle Document Capture app is available on the App Store and on Google Play.

# Working smarter

We create specialist software to improve
your business processes in simple steps.

**Spindle Self Serve**

24/7 Customer Portal
for Invoice Viewing

**Credit Hound**

Advanced
Credit Control

## Our strategic partners

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