Document Routing Workflow Solutions

Easily manage how and where your documents are sent

Solution overview

B2BE's Document Routing workflow is a highly flexible, easy to use way to manage how the recipients of your business documents, such as invoices, receive them.

If you use the full range of document distribution methods such as; EDI, email, print management (or even facsimile which B2BE can support) or a subset of these such as EDI and email the Document Routing workflow allows you to change how each recipient receives the document easily with a few clicks.

If you want to change a customer from print management to email to reduce costs it is as simple as a few clicks. Similarly, if you need more options when you email documents such as Cc's, Bcc's and the ability to change formats by recipients, for example, PDF, Excel, XML etc. the Document Routing solution allows you to do this easily.

Cloud based and easy to use

The Document Routing workflow is easily accessed via the Web Portal meaning it's cloud based. Using specific records within the document such as the customer number you can configure the distribution method in seconds.

Based on the method you can enter the distribution details, email address, for example for emailed documents and once saved the documents will be sent based on the configuration.

Supports all B2BE Document Management solutions

Whether you want to distribute documents via print and post, email, EDI or even facsimile. The Document Routing workflow is easily configured to handle all the methods so you can alternate between one and all. In fact, if you need to send a document using two methods this is easily achieved through the solution.

Supporting any format

Of course most documents, other than EDI, are usually distributed as PDF documents. However, the workflow allows you to distribute any format to any recipient. In fact you can send the same document to two recipients in different formats if need be.

Move document to cheaper methods

Everyone wants to have the most efficient and cost effective approach to Document Management. The Document Routing workflow gives you just that. You can move recipients easily from one method to another based on your trading partner's capabilities and most cost effective approach to achieve that in a couple of clicks.

For example, you may want to automate customer invoices and your mail room. B2BE will handle your print and post but over time you can then move the customers to email or even EDI reducing costs and making your document management approach more automated.

Visibility and audit

Each document sent via the Document Routing workflow is fully auditable and traceable. That is, you can see when it was sent, how and to where.

All documents are historically available based on the archiving rules and in scenarios where a document needs to be re-sent it can easily be managed within the workflow.