



Data Sheet

Document Creation Workflow Solutions

When you need to create documents
your system can't

Solution overview

In the world of business document management and automation ERP and business systems usually will manage the receipt and creation of documents depending on the defined business processes. However, sometimes it isn't practicable to create the document in your ERP or business system, or simply the document type is very specific or not a standard business document, within your business or industry.

The Document Creation workflow allows you to create documents based on pre-defined configurations which can mean they're created from scratch or they can be created using other documents that have already passed through the B2BE Document Management solutions. Document Creation is a simple and easy to use tool when you need to address the non-standard or just need a simple way to create a document.

Key Features

Cloud based and easy to use

The workflow is accessible via the Web Portal solution and is therefore cloud based and means it is intuitive and easy to access from anywhere. Users simply select the document they wish to create, based on their access to do so, and follow the interface's configuration.



Any document

There are documents that don't necessarily fall within the 'standard' business document set and systems do not handle well. Also, documents that may be standard in the business world that aren't easy to create in your system for any number of reasons.

The Document Creation workflow allows you to create any document to be distributed to your trading partners, or for that matter, simply internally.

Any Document Management requirement

When you have created the document based on the defined approach the document is then imminently available to be used in other Document Management solutions or workflows.

For example, if you want to create a credit request you can then move this into Document Approval and finally, if it's approved to Document Routing for distributions. Likewise, it may be used completely independently simply to create a document your business needs to use internally.

Configurable validation and control

The interface to create a document can also be configured to validate the data that is entered by a user to ensure it meets its purpose and use of the document.

This ensures the right type of information is input and will in its turn better align with your Document Management solution requirements.

Favorites management

While the document may not always be standard the data that is input into a document maybe repeatable. That is, the data is used on the same document on an on-going basis.

The workflow allows the user to setup favorite line details and favorite documents so they can be easily re-created when required to help speed-up the creation process.

About B2BE

B2BE delivers electronic supply chain solutions globally, helping organizations to better manage their supply chain processes, providing greater levels of visibility, auditability and control. We're driven by a passion for what we do, inspired by innovation, and underpinned by a wealth of knowledge. With over 20+ years of experience, the B2BE teams operate worldwide.

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