

## LET UNFORM HELP YOU MANAGE THE ENTIRE LIFE CYCLE OF YOUR DOCUMENTS



UnForm® is a powerful enterprise document management and process automation solution that seamlessly integrates with Acumatica. Our platform-independent, fully browser-based solutions provide the ability to create, deliver, capture, index, route, and store documents from start to finish so that a transaction's entire life cycle can be accessed with one easy search. Our data extraction and workflow capabilities enable the automation of data entry-intensive processes. UnForm makes managing your documents less time-consuming and costly, freeing up your team to focus on more cost saving and revenue generating tasks.



### DOCUMENT CAPTURE

Regardless of how documents come into your business UnForm automatically captures, categorizes, and indexes these documents. Data is extracted and validated against Acumatica to ensure accuracy.

- Automatically process documents and extract data for throughput to Acumatica
- Monitored email mailboxes and directories
- Drag & drop
- Detection logic applied for document classification
- Enhanced data extraction
  - PDF text layer
  - Barcode recognition
  - Full text OCR
  - AI-driven OCR
  - Data lookup against Acumatica
- Data Validations
  - Identifies duplicate entries
  - Mathematical data calculations
  - Validate against Acumatica
- Automatically link to related documents



### PROCESS AUTOMATION

Improve operational efficiency by eliminating manual data entry of transactions into Acumatica. UnForm extracts data from documents and formats it as an electronic transaction automatically generating Bills and Sales Orders into Acumatica.

- Sales Order Automation
- Accounts Payable Automation
- 3-Way matching
- Reduce paper handling
- Route documents for approval
- Signature Capture at Point of Sale
- Improve internal accounting controls



### DOCUMENT MANAGEMENT

Safely and securely store your documents in one repository for instant access from any location. Integration is seamless... just click UnForm from within Acumatica to view related documents.

- Associated documents are linked automatically
- View all related documents with one simple search
- Eliminate filing cabinets and misplaced documents

