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The SourceLink document storage solution is a niche application designed to integrate directly with QuickBooks to store and tag supporting documents with individual QB transactions.

Core Functionality

The Workflow DMS module incorporates rules-based document routing functionality. Documents are organized by a folder/sub-folder hierarchy. The files are stored within Windows Explorer. A feature called TurboFolder automatically creates the folder structure for a client based on the QB transaction types. A “print to SourceLink function” is available inside of QuickBooks. 4

Integration

The focus of the integration is on QuickBooks. SourceLink is fully integrated into the QB screens with an embedded SourceLink toolbar. You can directly access supporting documents in QB to view them while you are in the transaction screen. The document name is automatically assigned based on the QB transaction data.

Documents can be uploaded directly via browsing Windows Explorer or scanned directly into the user's inbox. An important feature enhancement is a new OCR tool for capturing documents and converting them to readable text. You can also launch any TWAIN-compliant scanner. 4.25

Advanced Functionality

The search functionality is very granular, allowing you to quickly find the files for

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user pack is \$1,229.

2010 Overall Rating 4

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