TraX
FOUNDATION
Digital Filing Cabinet

The painless way
to go **paperless**

Enterprise
IMAGING SYSTEMS

TraX Foundation is a leading, trusted document management software system. It takes everything that's good about a physical filing cabinet and digitises it, allowing you to auto-capture, index, store, retrieve and distribute documents electronically. It accommodates both paper-based and electronic files in a structured and secure database that is accessible online anywhere, anytime. It is simple to use yet contains the power to revolutionise the way your business manages documents.

Whatever types of documents you need to manage, TraX can facilitate your needs, whether it's PODs, invoices, credit notes, orders or contracts TraX will optimise,simplify and speed up your document management processes.
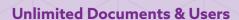
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'It's an excellent system. If you aren't already using a document management or accounts payable automation system, I would highly recommend it.'

Trevor Flanagan
Managing Director, Beechfield Healthcare

Features

Unlimited Documents & Users

– Store and file as many documents as you like.

– Add in as many file types and sections as you like, from HR and admin to credit control and contracts, depending on your requirements.

– Share them with as many users as you want. Control who has access to which documents.

Automatic e-Document Capture

– Documentation generated by your ERP/accounts system auto connects to TraX where it is collated and stored with 100% accuracy .

– For 3rd party documentation TraX email harvesting function is used to auto-extract relevant electronic documents and store, index and file them in the TraX system.

Rapid Document Scanning

– For paper-based documents TraX facilitates superfast document scanning at 1 second per page, turning all paper-based documents into PDFs.

– Scanned documents are automatically filed and linked to related documents such as purchase orders, sales invoices etc.

Digital Filing, Indexing & Searching

– Store your documents in a structured and easily accessible way.

– Once your documents are in TraX you can index/file them in line with your own categorisation requirements, keeping your files organised and easy to find.

– Related documents are automatically linked; e.g. sales invoices are auto-linked to their PODs and any other required documentation. All linked documents can then be collated for automatic email distribution to team members, customers, suppliers etc.

Swift Document Retrieval & Distribution

– Puts the information you need at your fingertips.

– Retrieve files on your PC, laptop, tablet or smartphone whenever you need them, from wherever you are, and email them to others, as required.

– Browse or search for your documents across a range of parameters, such as indexing information, date, PO number etc. TraX allows customised searching features that can be unique, or combination-based.

– Built-in viewing for PDF, TIFF, JPG and PNG, as well as Microsoft Office formats.

– Share whole or partial documents with ease. Add notes to files pre distribution. Easily collate multiple documents and issue for email, print or export.

Aids GDPR Compliance

– Personal data handled by your business is immediately accessible and stored securely in TraX. This is a core requirement of GDPR legistration.

– Where personal data needs to be redacted the search and filtering function in TraX makes this a seamless process.

Data Security

– Secure access via Windows and User Level Authentication.

– Document access rights can be granted at individual, role, department and group level.

– Access rights can be easily amended and controlled by you.

– Complete audit trail history of all documentation.

– Documents are stored securely in line with your preferences, either in our secure private cloud or your server.

– All documentation is regularly backed up in case of disaster.

Native ERP/Accounts System Integration

– Capable of integrating with all major ERP systems (over 100 in total) so you can access the TraX document management system from within your ERP/accounts package.

– Integration ensures the efficient processing of documents and allows sharing of critical information between systems.

Reporting

– Real-time view of your entire document management system.

– Get clear visibility of what documents have not yet been added to the system or are at various stages of the approval process.

– Reports can be exported, printed and emailed quickly and easily.

Flexible Solution

– Can accommodate both paper and electronic files.

– Submit files either manually or automatically.

– File the same document in multiple locations automatically.

– Can be configured for bespoke requirements.

Benefits

Put an end to manual data entry

– Automatically extract and store designated documents from email or scanned pdfs.

– Auto-capture and connect data in real-time with ERP/accounts system.

– Relevant documents are linked together and filed for easy access.

Puts all your documents at your fingertips

– Easily locate the document you need when you need it.

– Securely access your documents anytime, from anywhere.

Reduces or eliminates paper

– Saves money on storage, printing and postage.

– Better for the environment.

Keeps your data safe and secure.

– Paper-based files are at risk of damage, theft and being misplaced.

– With TraX you'll never lose an important document again.

Prevents errors

– Even the most meticulous of us can make the occasional mistake or misplace a document. TraX auto extracts relevant data from your documents, filters out duplicates and highlights anomalies, so there's no room for error.

Keeps your business audit-ready and GDPR-compliant

– TraX gives you an audit trail and full traceability on every single document.

– Keeps all your customer and employee data safe and helps you meet your GDPR requirements.

TraX
FOUNDATION
Digital Filing Cabinet

The faster, smarter, more efficient way to store, manage and automate your documents and data.

To find out more about how Enterprise Imaging Systems and TraX Digital Filing Cabinet can improve your document management processes get in touch at
trax@enterpriseimagingsystems.com

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