Document Capture Automation Tools to Improve the Way You Work with Data

Your business deals with documents on a constant basis. Without technology in place, organizing the different types of files and contact points for written communication can be intense. You might have paper contracts, email and attachments, faxes, and web forms all integral to the same client or customer file. This is where capture automation becomes effective in streamlining your productivity and organizational ability.

With document capture software, each of the platforms and file types can be organized and saved to a central location. Data can be extracted so that no information is missed. With manual methods of filing and organizing client accounts, there was always the danger that something might be left out. For instance, information gathered through email to an employee might not make it into the client file. Missing information might lead to costly mistakes.

But this can be avoided by implementing document capture automation into your daily business processes. Let's take a look at the top document capture tools that will improve the way your organization works with data.

Tools to Look for in Your Document Capture Automation Software

If you're currently looking over vendors and software, you'll want to make sure that the investment is worth the return. Beyond product features and functionality, it is importance to take some time to verify the level of training and customer assistance your vendor offers. Great training makes all the difference in implementing new upgrades successfully and cutting down lag times while employees learn software.

Each vendor may offer slightly different solutions, however the best options for document capture solutions deliver customizable, scalable tools that grow alongside your business's evolving capture requirements. Here are some of the features to look for in a more robust document capture system:

Integration with Current Multifunctional Printer. Your document capture automation software needs to work with the document types your business uses. Verify that the software works with large scale printers, desktop scanners, fax machines, and other external systems where documents are gathered for business. Choosing a product that integrates well with current business protocols makes the capture process less costly and easier for employees to master because they're already trained on current equipment.

Email and Attachment Integration. One important facet of the communication process for most businesses is email. Every employee will be using email correspondence to communicate with customers and vendors. That documentation is often not formatted in a specific way but is integral to day-to-day business function. Your document capture software should be able to extract pertinent information from email correspondence

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to organize and save in a central location. This function allows far better productivity and efficiency for accounts which are managed by multiple employees. Look for a program that can also save and store attachments to email, so pertinent data files aren't lost in translation.

Validate Information. As they say, programs are only as good as the information they're given. In some instances, there might be typos or errors on documents captured from one of your various platforms. If all of that information was mindlessly compiled, you'd run the risk of faulty information working its way into your files or, worse, overriding accurate information. A great document capture program will also include some form of validation, so that information is checked before it's saved.

There's no question that document capture automation software can improve the collaboration within your business. When used effectively, this technology provides a powerful tool to help you utilize documentation. Contact Square 9 today to get started!

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