

ERP Output Management Software

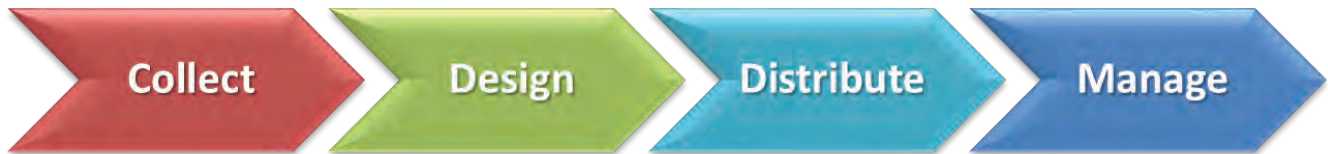
Engaging your customers is more challenging than ever- companies are now routinely bombarded with emails, digital media and traditional marketing streams. So, in this age of “information overload”, making your message stand out from the crowd is of paramount importance.

Successful businesses captivate their clients with interesting documents containing tailor-made information. Whether it’s an exciting offer, a well-designed feedback form or an important update, a relevant document will communicate more effectively, build empathy and lead to greater customer loyalty.

Unfortunately, ERP systems were never designed to allow sophisticated marketing initiatives or to utilise the latest methods of business communication. Now, using Formate eVo you can produce dynamic and compelling communications to all of your customers without expensive modifications to your ERP system.

Deliver relevant customised messages, at the right time, via the preferred channel!













Formate eVo provides total control throughout the document lifecycle – from composition through to distribution.



- 1 Seamlessly collect and parse data from anywhere in your business.
- 2 Design the customised documents your business needs.
- 3 Reduce or eliminate print costs by distributing documents and data electronically, and in the most appropriate format.
- 4 Finally, store and manage your collateral by publishing to web portals, workflow processes or document management systems.

Some Example Formate eVo Applications

The very essence of Formate eVo is flexibility and our customers are continually finding new and creative applications:

- | | |
|---|--|
|  Design engaging business documents, each one tailored to the recipient and delivered appropriately |  Monitor an email account (e.g. invoices@acme.co.uk) and download documents to kick off a workflow |
|  Send HTML emails to your customers with variable text, banners or special offers |  e-Bill your customers with full delivery traceability through the ParetoPost service |
|  Send SMS text or fax messages to advise customers of shipments or special events |  Interact with ODBC databases – add extra info to your documents from data held outside your ERP system |
|  Make massive savings on your postal costs by using Formate to feed our hybrid mail service |  Read from, or write to MS Excel spreadsheets for all your reporting needs |
|  Publish documents and meta-data to a document management system, MS SharePoint or web portals |  Deliver secure information encryption & digital signature |
|  Automatically extract data from PDF documents & automate printing of PDF documents |  Create barcode labels & drive thermal printers |



1 Formate eVo Process - Collect

Automatically collect data from any number of data sources or business systems. Data can be collected in real-time or as a scheduled event.

Choose your data source

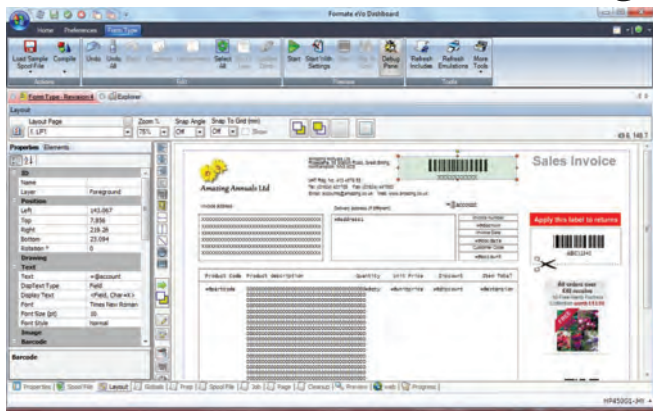


...and choose the file format

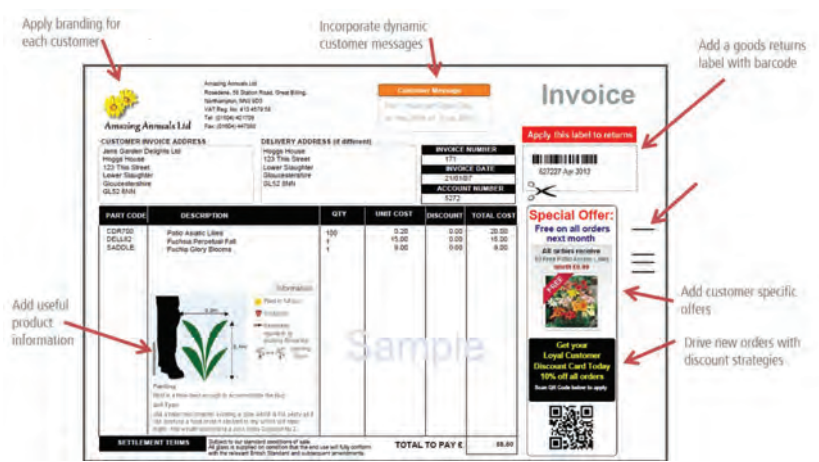


Formate eVo works with all common file and data formats and there's no need to imbed special control characters in your input data

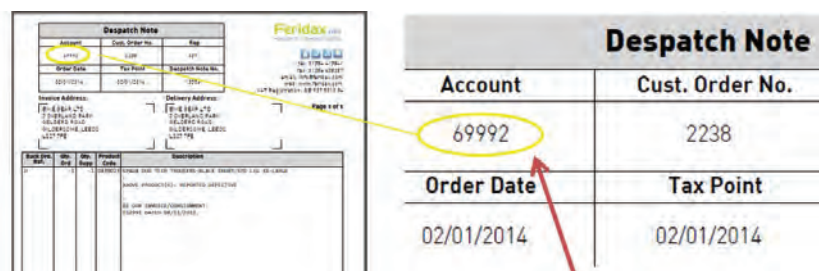
2 Formate eVo Process - Design



The Formate eVo designer allows the rapid development of compelling documents. Any element of the form can be turned on, or off, depending on the input data or the final recipient.



Working with PDF's



Extract data

Sometimes a PDF document is already formatted and all you want to do is add an extra page, insert an image or perhaps redirect to a workflow process.....no problem!

With Formate eVo you can add or remove from a PDF, add barcodes, read d layer or even add a digital signatu

Insert marketing images

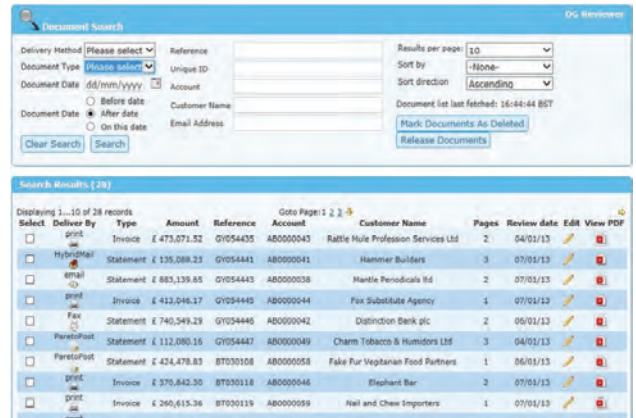
Add or remove pages



2 Formate eVo Process - Review

The DG Reviewer module allows users to search and review specific documents prior to release.

For example, an accounts team may delete zero value statements or decide to e-Bill a large value invoice which requires full traceability.



3 Formate eVo Process - Distribute & Deliver



Formate eVo is all about flexibility and freedom. There's no limit on users, the number of output methods or any other crazy limitation.

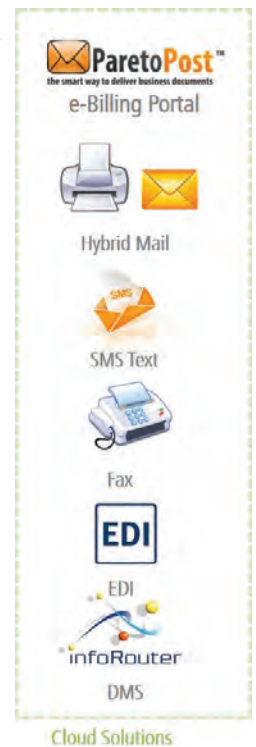
Cloud Services

Once Formate eVo is managing your output, it's a doddle to turn on any of the DG cloud services.

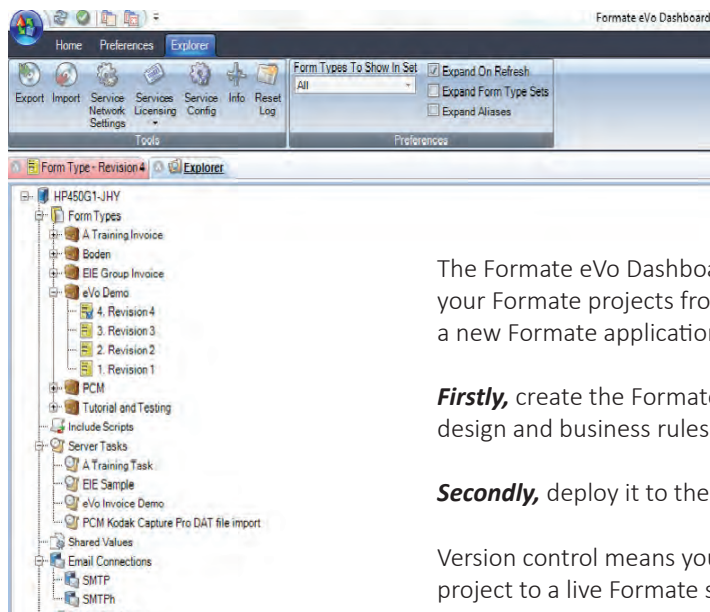
We're adding new ones all the time, so whatever your customer demands we've got the answer.

Common output types include:

Email (HTML supported), Fax, SMS Text, HTML, Print, Database (MS SQL, MySQL, Oracle), MS SharePoint, Excel and Word, Document Management System (e.g. infoRouter), FTP, EDI, Shared Drive, etc..



4 Formate eVo Process - Manage



The Formate eVo Dashboard lets you create and manage all of your Formate projects from one location. The development of a new Formate application is a 2 stage process:

Firstly, create the Formate form type containing the document design and business rules

Secondly, deploy it to the Formate server to execute (24 x 7)

Version control means you only release a new version of a project to a live Formate server, when you're ready.



Formate eVo FAQ

How is Formate eVo licensed?

Formate eVo can be purchased outright on a perpetual license, or can be rented for a single monthly charge - On-premise and Cloud based systems are available

Is there a software maintenance charge?

yes, on the perpetual license there is a 20% charge for software maintenance, which includes help desk support, technical fixes and free version upgrades

Is there a limit on the number of output types?

No, there's really no limitation on the number of output streams (e.g. printers, email, fax, publish to web etc.)

Is Formate eVo difficult to configure? – for users with IT skills (and appropriate training) it's really not difficult to use.

However, for companies without IT resource we can provide just the Formate eVo server and we do all the setup and maintenance for you

If I've got a 1,000 invoices in my spool queue, can each customer get a unique document, delivered in a different way?

Yes, each document can be customised depending on key fields (e.g. account number) and business logic, delivered in the most appropriate way

I want to email documents but there's no email address on my document or in my ERP system?

As Formate can query 3rd party datasources on the fly (e.g. SQL database or Excel), as long as there is a unique reference to tie the document to the email address held in the database, then we can provide a solution

Will Formate eVo work with my ERP system?

Yes, Formate eVo works with virtually all ERP systems (from SAP to Sage) without the need to modify their generic output

Can we run Formate eVo on our own cloud server?

Yes, for your own use (but not as a bureau service for other companies)

Can you host Formate eVo for us?

Yes, we can provide this service for a monthly charge

Is Formate eVo multi-threaded?

Yes, you can allocate threads to specific tasks for optimum performance, or for on-demand applications which need an instant response (e.g. pick-lists or delivery notes)

What specification of server does Formate eVo need?

Formate eVo requires a 64 bit MS Windows O/S with minimum of 4GB RAM – Windows Server 2008 R2, 2012 R2 or Windows 10 Pro

Will Formate eVo run on a virtual server?

Yes

Upgrading to Formate eVo

Do I need to migrate to Formate eVo?

End-of-life for non eVo versions of Formate has been declared for 31st December 2018. All new development work to improve Formate functionality will be for Formate eVo only.

Do I need help to migrate my current Formate processes over to Formate eVo?

This really depends on your Formate skill set and the complexity of your current application – for complex applications, we suggest that you purchase some professional services to help with your migration.

Document Genetics will be happy to advise which services are recommended. For sites with SOHO/LITE you will need to purchase professional services.

Is there an automatic export/import tool available to migrate my current Formate form types into Formate eVo?

No, there is no automatic import/export routine, however, existing form designs can be exported and imported into Formate eVo. Scripts can be copied over to Formate eVo but will need editing as many functions have been updated and have additional/different parameters.

