



DocumentVision helps you . . .

		
Retrieve	your files	fast!

Electronic Document Management Software for QuickBooks® users.

DocumentVision is an indispensable project management tool for QuickBooks®. It saves your company time and money, while improving teamwork, efficiency and professionalism in your office.

- Store and organize all documents, either paper or computer, related to jobs, customers, vendors and other business in a central location.
- Experience fast, easy retrieval of documents by whoever needs them when they need them.
- The Scan Wizard makes it simple to scan paper documents, while computer documents or files can be added to DocumentVision by dragging and dropping.
- All documents for a job or project are stored and organized by type for easy browsing and viewing.
- Conveniently search and view documents from within QuickBooks®. Great for viewing vendor invoices when processing payables.
- Design document templates and quickly generate RFI's, bids, submittals, transmittals, change order authorizations and other business correspondence. The generated documents are automatically added to DocumentVision for status tracking and retrieval.
- Integrated with QuickBooks®, so all your customer, vendor, project and company information is available for organizing documents.

For more information, email us at DVSales@DocumentVision.com or call us at **1-800-776-6556**. We will be happy to answer your questions.

Download the demo

With the demo version you can see how fast and easy it is to save and retrieve the documents you need!

- Scan or Drag & Drop any type of file into the electronic file cabinet.
 - Contracts, PDF's, reports, CAD drawings, emails, job site photos, spreadsheets, etc.
- Instantly retrieve any type of file, based on file attributes YOU set.
 - Search, sort, and categorize by job or project, vendor, customer, keyword, date, status, etc.

The Professional Version includes many powerful features:

- Multi-user network edition
- Automatically generate forms (instantly adding them to jobs or projects, customers, or vendors).
 - RFI's, Submittals, Transmittals, Bid Proposals, and more.
- Track status of documents, such as change orders or contracts.
 - On-Hold, Pending, Completed, Draft, etc.
- Track a document through every phase of its life cycle, while adding workflow notes & even reminders.
- Follow document status changes right down to the date, time, and user associated with the change.
- Store all files in a central location - in an SQL Database.
- Improve security by maintaining offsite backups of important business documents.
- Versioning allows your team to revise documents, while making sure only one person is revising at a time and everyone has access to the revision history and the latest version.
- Robust security provides protection for sensitive documents, audit reporting, and the ability to control access to advanced features.

VERSION COMPARISON MATRIX

	Demo	Standard Edition	Professional Edition
Add file	limited	X	X
Scan document wizard	limited	X	X
Organize documents	X	X	X
View file	X	X	X
View file with program	X	X	X
Edit file properties	X	X	X
Rename file	X	X	X
Delete file		X	X
Restore file	X	X	X
Empty DV Recycle Bin		X	X
Check-out file	X	X	X
Check-out file with program	X	X	X
Cancel Check-out	X	X	X
File versions	X	X	X
Export file	X	X	X
Archive file		X	X
Quick Search tool	X	X	X
Search from QuickBooks®	X	X	X
Single User	X	X	X
Multi-user network			X
Central document repository	X	X	X
Document notes			X
Workflow tracking			X
Workflow reporting			X
Audit history			X
Sensitive document protection			X
User security levels			X
Maintain lists for document type, category and status	X	X	X
Import data from QuickBooks®	X	X	X
Built-in Backup			X
Generate RFIs, submittals, transmittals and more			X
Preview, print and/or email generated forms			X
Forms template designer			X
my DV calendar			X
Microsoft SQL Server Express			X
Microsoft SQL Server Compact Edition	X	X	
Vista compatible	X	X	X