

DocLink helps teams move work forward – faster and with fewer exceptions – by capturing, indexing, and linking documents and data across every department. Unlike stand-alone or ERP-included AP automation tools, DocLink creates a connected document ecosystem where every file is searchable by the business values your teams rely on every day (vendor, PO, GL, item, dates, and more), so the right information reaches the right people at the right time.

ENTERPRISE SOLUTION – DOCLINK POWERS YOUR ENTIRE ORGANIZATION

DocLink is the only solution of its kind that is enterprise-wide – it provides the same document intelligence foundation across any departmental operation including:



AP AND PURCHASING
WORKFLOWS



HR AND ONBOARDING
RECORDS



SALES ORDER PROCESSING
AND CUSTOMER SUPPORT



LEGAL AND CONTRACT
DOCUMENTATION



AR DOCUMENTATION AND
CUSTOMER DELIVERY PROCESSES



ANY PROCESS THAT NEEDS FAST
TO DOCUMENTS ACCESS

BUILT FOR ORGANIZATIONS THAT NEED VISIBILITY, ACCURACY, AND SCALE

Most organizations deal with documents and data scattered across teams and systems – slowing down processes, limiting visibility, and turning exceptions into delays. Instead of driving execution, teams waste time chasing information.

DocLink eliminates the friction that slows operations down – missing context, incomplete documentation, manual routing, and disconnected systems – by making documents and data instantly accessible, intelligently linked, and built into how work actually happens:

Keep work moving
across teams,
systems, and locations

Reduce delays cause
by missing information
and manual handoffs

Improve process
visibility, traceability,
and control

Scale without
adding bottlenecks
or headcount

Faster exception
resolution with
audit-ready history

THE DOCLINK ADVANTAGE

¹ Search By Business Values - Not File Names

DocLink indexes every document using the data that operations teams actually use (not folders). That means anyone can find what they need in seconds, without hunting, guessing, or rework.

² Automatically connects the full process story

DocLink links related documents together, so teams get the full context behind any transaction, request, or exception without wasting time tracking down attachments across systems or departments.

³ Works seamlessly with your ERP

DocLink integrates bi-directionally with your ERP, so documents and updates automatically sync between systems. Users can capture, create, approve, and retrieve information directly within their normal workflows.

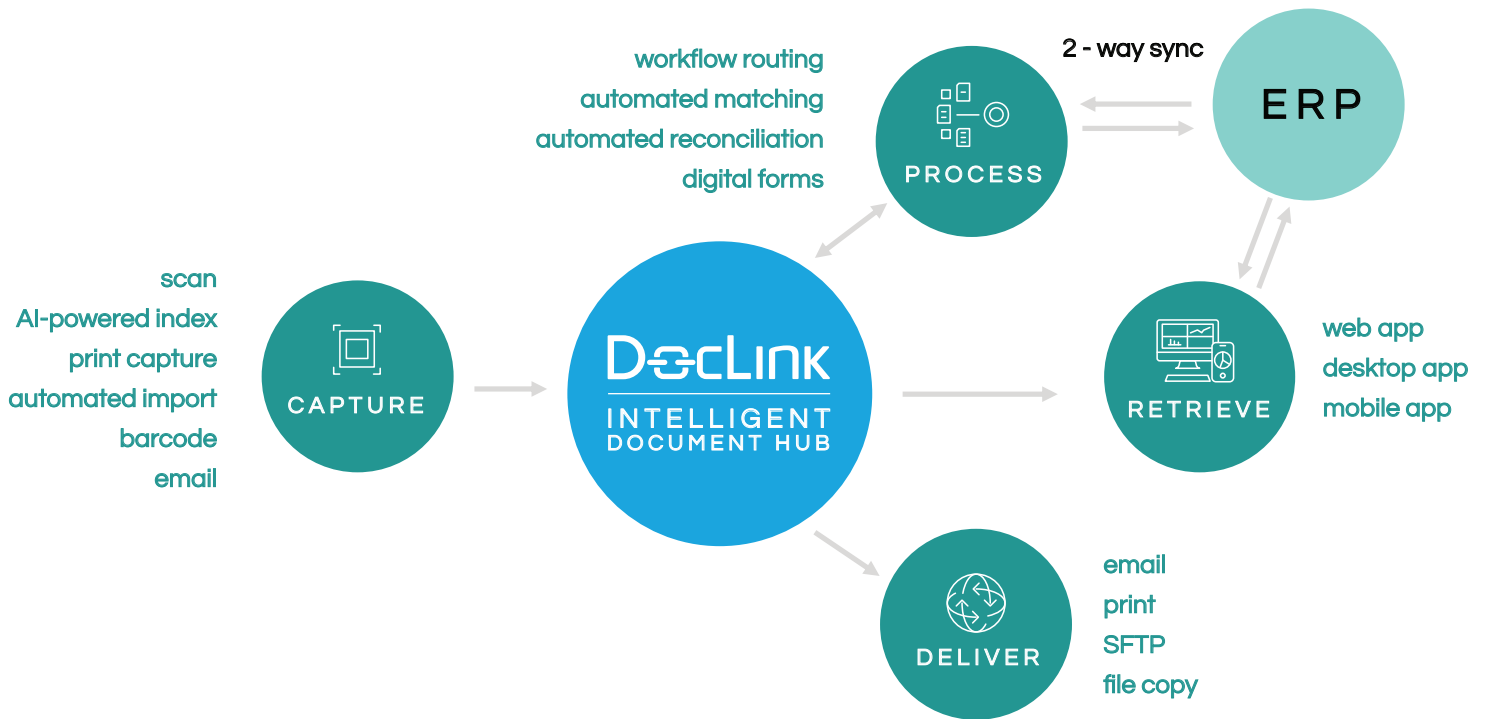
⁴ Automates routing, approvals, and exception handling

DocLink turns document-heavy processes into streamlined, trackable workflows with automated routing, configurable approvals, and built-in visibility.

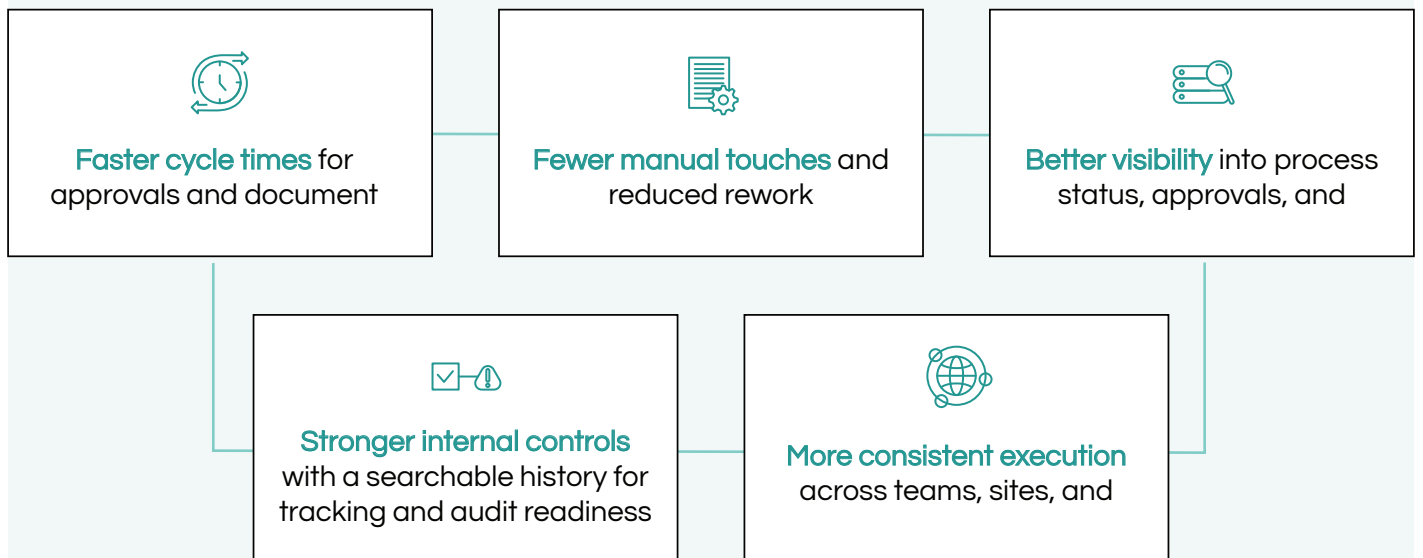
WHAT MAKES DOCLINK DIFFERENT – CORE CAPABILITIES THAT DRIVE BETTER OPERATIONS

Ai-Powered Indexing	Automated Reconciliation	Intelligent Process Automation
IndexAgent and DataMatchAgent use AI to automatically identify and index critical information from documents, then match it to the correct vendor or customer record. No templates or document training required. BENEFIT: Improve data accuracy, eliminate manual data entry for faster document processing	Configurable workflow automation for invoices, purchase requests, and any business process—using rules-based routing, approvals, and escalation. BENEFIT: Keep work moving, reduce delays, and create traceability at every step.	Compares any line-item data across documents and systems, identifies matches, flags discrepancies, and routes only true exceptions for review. BENEFIT: Less time matching line-by-line, fewer spreadsheets, and faster close cycles.
Automated 2- and 3-Way Matching	Automated Document Delivery	Electronic Forms
Support fast validation of documents and transaction records—reducing manual matching work and improving consistency. BENEFIT: Fewer exceptions, fewer errors, and faster approvals without added effort.	Send multiple files at once to customers and vendors—along with any required supplemental documentation. BENEFIT: Faster fulfillment, fewer follow-ups, and smoother external coordination.	Digitize any form—from expense requests to onboarding documents—so information can be captured consistently and used across systems. BENEFIT: Replace manual handoffs with structured data and smoother processing.

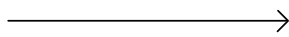
DOCLINK | INTELLIGENT DOCUMENT HUB



OPERATIONAL OUTCOMES YOU CAN EXPECT



AI-DRIVEN
DOCUMENT
AUTOMATION



TURN YOUR
DATA INTO
TRUSTED RESULTS

