PackageWorks

Enable Tailored Document Sets with One Click

Pre-define and Guide Collecting and Completing Document Packages

DocStar® PackageWorks delivers streamlined, intelligent package-based workflows designed to dramatically increase productivity and help ensure that document packages are consistent and complete.

Today's organizations are creating document packages every day—like HR packages for employees, student records, closing documents for real estate, and packages required for legal or accounting clients. These packages need to be complete, accurate, error-free and delivered on time. DocStar PackageWorks allows you to define collections of document types and indicate whether they are required or optional. In addition, setting document and package-level due dates helps enable timely and thorough completion of workflows that require the collection of documents.

After all required documents have been gathered and the package workflow is complete, distributing these packages or subsets of these packages is easy with the built-in submission's capability. Once you define the package submission type, DocStar PackageWorks will collect the designated documents in the requested order and help create a tailored submission package to be e-mailed to a recipient. Integration with DocStar Forms and DocStar Workflow further enhances the solution by electronically capturing documents at the beginning of the input process and applying individual document workflow routing and approvals as needed, while still enforcing package-level requirements.

Eliminate uncertainty and errors around digital document packages

DocStar PackageWorks helps streamline the task of collecting and managing key documents as part of the case management process. Your organization benefits from a faster, easier, and more accessible document collection and management process through features designed to deliver:

- Cost and time savings—eliminate costly and time-consuming document gathering and compliance guesswork
- Better client relations—process cases faster to improve client responsiveness
- Enhanced visibility and control—gain centralized document and status information and audit trails with quick, easy access

➕ DocStar PackageWorks

Benefits

Save time and eliminate tedious manual processes

Support compliance initiatives

Increase efficiency with automated e-mail alerts

Improve employee productivity and customer satisfaction

Streamline approval processes

Reduce document collection errors

Gain centralized document package information and allow audit trails

Work Smarter

DocStar PackageWorks allows your important business documents to be routed electronically, enabling users to process work more efficiently, faster, and more accurately. DocStar PackageWorks builds a document checklist designed to gather and track a set of documents necessary to complete a business workflow.

Reduce Tedious Steps

Automate time-consuming and error-prone manual processes to increase productivity and operational efficiency, delivering a significant increase in workplace productivity.

- Streamline people-based activities and track progress
- Standardize manual processes, such as the distribution of inter-office mail

Manage Workflows

With DocStar PackageWorks, you can know how processes are performing. Managers can identify any lags and workflow bottlenecks that occur to redistribute workloads to other users before problems escalate.

- Easily maintain performance comparisons
- Track document-related activity to improve quality and user productivity
- Gain accurate and timely system feedback for reallocating staffing resources
- Find the status of any document package instantly

Key Features

- DocStar Forms and DocStar Workflow integration
- Document package/slot definition (document requirements, document and package approval requirements, status, due dates, and more)
- Submission type definition (composition and sequence)
- Unlimited sets of document package requirements that pre-define and guide the collection and completion of document workflows
- Built-in alerts and approval capabilities to create and maintain consistent processes
- Items directed to the right users, to allow for timely action and eliminate confusion
- Streamlined case/transaction management to accomplish more business, more accurately

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We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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