

# Automate Supporting Documents

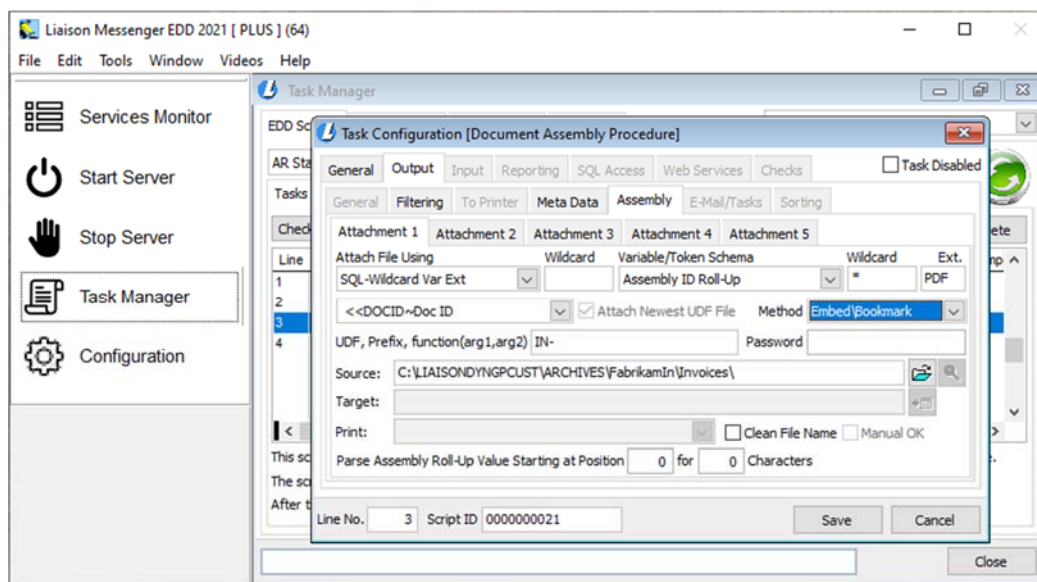


## Advanced Document Retrieval, Assembly, Merging and Attaching



Liaison Messenger EDD operates on the foundation of **metadata principles**, utilizing Data Identifier Tokens (DITs) to extract vital information from printed documents. What sets it apart is its unique ability to empower users to establish rules based on the data within their documents. These rules extend beyond simply determining where to print or to whom and how forms and reports should be sent, such as invoices to customers or purchase orders to vendors.

Users have the flexibility to **define specific criteria for the automatic assembly or attachment of supporting documents**. This groundbreaking feature eradicates the need for manual intervention in matching documents with their respective counterparts.



To highlight its effectiveness, let's consider the scenario of enhancing the Accounts Receivable (AR) statement process. Typically, these statements are dispatched to customers to provide a summary of previously issued invoices that are still awaiting payment. The process of collecting payments often requires

follow-up phone calls or emails to inquire about payment timelines. A common stall tactic from customers is to claim, **"I mustn't have received the invoice; could you resend it?"** This response deflects the inquiry with another question, creating a roadblock to the payment process.



Key Feature Attachment Video  
(scan-or-click)

However, Liaison Messenger EDD's remarkable document assembly capabilities shine in situations like these. This functionality empowers you to automatically include past-due invoices alongside the AR Statement. Consequently, it simplifies the process for your customers to acknowledge their outstanding obligations, leaving no room for claims of not receiving the invoice. Your collection inquiries are now met with payments rather than additional queries.

The exceptional capabilities of Liaison Messenger EDD **extend well beyond the assembly of AR statements and unpaid invoices**. It empowers organizations to establish rules for a wide range of form types, whether they are reports, spreadsheets, images, or any printable document format.



Attachment Example Video  
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Liaison Messenger EDD offers a robust automated document retrieval capability allowing it to **access files stored in Microsoft SQL Server** like those documents stored using the Document Attachment feature of Microsoft Dynamics GP, SL, and the widely utilized third-party field service platform, Wennsoft (formerly Key2Act).

Surprisingly, the supporting document doesn't even need to exist at the time of printing. With the PLUS add-on, Liaison Messenger EDD can generate supporting documents just-in-time by calling a separate SSRS/Crystal Report, passing arguments, and attaching them. This dynamic capability empowers you to create rules-based criteria based on the form's data and generate the supporting document on demand and only if needed.

Additionally, another remarkable feature of Liaison Messenger EDD's merging capabilities is its ability to dynamically create **Adobe PDF "bookmarks."** This feature seamlessly merges the retrieved documents into the primary documents, generating bookmarks that function as a table of contents. In the example of AR Statements, each past-due invoice is listed in a side panel, allowing readers to navigate swiftly and view each respective invoice. This enhances document accessibility and streamlines the navigation process.

In essence, Liaison Messenger EDD operates at a strategic level, allowing organizations to automate and optimize their document workflows with precision. It reduces manual tasks, minimizes errors, and ensures a more streamlined process. With the ability to create rules based on data criteria, Liaison Messenger empowers organizations to take control of their document management, bringing a new level of efficiency to their operations delivering a superior user experience.

In conclusion, Liaison Messenger EDD is not merely a document management tool; it's a strategic partner that unlocks the potential for automation and precision in document workflows. To explore the transformative possibilities of this high-level document management solution, connect with us today. Elevate your efficiency, reduce manual efforts, and usher in a new era of document management excellence with Liaison Messenger EDD.



Excerpt from Attachment Example Video



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