2025

INBOOKS

FEATURES AND BENEFITS

Features and Benefits

Quick, Powerful, and Easy to Use

INBOOKS was designed for professionals like yourselves that value your time and need quick and easy access to your documents. It is the perfect blend of usability, power, and productivity.

Accounting/ERP Integration

1. View documents with one click from most accounting/ERP system.
2. Auto-name and auto-file documents based on the transaction of focus.
3. Related document linking without manually keying or dragging documents between folders.
4. View transaction documents in your accounting system or independently from the browser or client software.
5. Create transactions in your accounting system from INBOOKS documents in most accounting systems.
6. Scan directly to INBOOKS while connected to your accounting system.
7. Drag documents related to a transaction in your ERP with auto-naming based on the accounting system.

A/P Automation

1. Scan support from desktop scanners, network scanners and digital copiers.
2. Auto-pull invoice attachments from a personal email account or an organizational email account such as payables@mycompany.com
3. Process hundreds of invoices per batch.
4. Recognize invoice content WITHOUT creating templates for each invoice.
5. Read line items and match lines with open purchase orders from your ERP system or from a 3rd party requisition system.
6. Create queues of invoices for review by department, location, etc. and assign users access to the queues for processing.
7. Select items that don't have referenceable content on the invoice from the PO item list or all items.
8. Review, edit and submit invoices to workflow in the queue or remotely from a browser.
9. Submit transactions to a workflow for routing and approval.
10. Clean up invoices before they make accounting entries requiring revisions.
11. Transfer invoice data directly into your accounting system eliminating data entry for most systems.
12. Process and recognize an unlimited number of invoices without any per-document fee.

Searching

1. Easy to understand.
2. Reducing valuable time looking for papers is guaranteed with our full text searching that lets you find any word in any document.
3. Searching by document date narrows your results and saves time by limiting the number of documents in your search results.
4. Searching through custom strings and notes help you find documents where valuable information has been added like a customer number or contact name.
5. Powerful!! Just as fast with 1,000,000 documents as it is with 100 documents.
6. Fuzzy Search capability helps you find documents and folders where a word was misspelled.
7. Ability to save your most commonly searched criteria which can be made public.
8. Powerful search functions like finding the word "apple" within 5 words of the word "red" gives a new meaning to being precise.
9. Print your search results for a reference of the documents returned.
10. Save your search results to a Window's folder with the option to combine the documents.
11. Ability to email directly from the search results window with the option to combine the documents.
12. Export search results to a CSV to further analyze findings.
13. Ability to click on individual thumbnails for easy navigation.
14. Refile search results to a different filing rule.

Organizer

1. Use a Windows Explorer like interface to find documents logically and instantly.
2. Gain freedom from dealing with cluttered files placed all over your hard drive with our behind-the-scenes virtual mapping.
3. Store one copy of a document in multiple storage locations without having to understand ever-changing server file systems.
4. Ability to Copy and Move folder structures.
5. Add multiple documents from a folder to the Document Action window which will provide access to print and email functions and more!
6. Choose what fields to display and categorize documents.

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Working with Documents
1. Make viewing a document on screen quick and painless with tools that will Pan, Rotate, and Magnify your documents.
2. Print or email the entire document or select a page range. Your customers will be amazed when the document you are discussing shows up in the middle of your conversation.
3. Use Barcode Cover pages to instantly file your documents.
4. Make your documents living documents by keeping notes when you discuss a document with a customer.
5. Copy, Cut, and Paste pages from one document to another.
6. Save specific pages or the whole document out to a file, either as a PDF or Tiff file.
7. Add Annotations to a Document – highlight text, add stamps, draw boxes and more.

Email Documents
1. Email Support for MAPI compliant email applications such as Outlook let you send any document through e-mail with the click of a button.
2. You can email your documents in PDF format from INBOOKS so that others can easily access your information.
3. Send emails directly to INBOOKS from your email program allowing you to log your emails with corresponding documents.

Distributing Your Documents
1. Add documents to your iPack by selecting folders or adding results of a search.
2. Export your documents from an iPack to a USB, or a non-INBOOKS folder.
3. Take your iPack documents with you for legal proceedings, on business trips, or while working from home.
4. Export images so that you may view them on another INBOOKS system or through an Internet browser such as Chrome or FireFox which makes the transporting of documents quick and easy!

Bates Stamping
1. Provides sequential page numbering and controlled document ID for documents.
2. Bates stamp by document or batch.
3. Place your stamp on the top, bottom, or corners of the document.
4. User definable stamping.
5. Auto-Scaling of your documents.

Portfolio Manager
1. Used to automate cover page generation, storage location structuring, document indexing, retention criteria, and security with minimal data entry.
2. Saving time is easy when you can enter data once to create many documents.
3. Track missing documents.
4. Use data lookups from another database to automatically retrieve valuable information without having to re-key.

INBOOKS Printer
1. Easily send your digital documents directly into INBOOKS!
2. Can be accessed from any type of document.

Scanning
1. Supports TWAIN and ISIS scanners for universal compatibility.
2. Supports Color and Black & White documents or photos, which increases your document options.

Batch Scan
1. Templates can be assigned for batches to make scanning of large quantities of documents easy and user friendly.
2. Saving time is easy when using Portfolio Manager generated cover pages for your documents. Place on top of your pages and automatically have it matched up when the document is processed.
3. Scan documents directly into INBOOKS!

Using Digital Copiers
1. Works with virtually all Digital Copiers that have either a hard drive or ability to save images to a network drive.
2. Supports Single and Multi-Page TIFFs or PDFs
3. Allows you to set a unique collector path per user.
4. Works with cover pages to automatically file your documents.

Batch Review
1. Review scanned documents before filing.
2. Security based reviewing options by roles or users.
3. Documents may be "Quick Saved" with the click of a button.
4. Keep your information organized and together by adding, deleting, or re-arranging pages in a document.
5. Audit your scans by reviewing page counts and document content.

Features and Benefits

inZone
1. Zonal OCR/Barcode Recognition/Print-to-File.
2. Automatic data lookup from captured index value.
3. Complete document creation and automation.
4. Ability to configure fields to separate and combine pages as required.
5. Scan documents as a batch, no need to spend extra time at the copier separating files!
6. Configure as many documents as needed!

Hot Folders
1. Use a one-touch key on your MFP or digital scanner to auto-route a document.
2. Define a directory that is polled and assigned a document template for auto-document creation.
3. Use individual files or divider pages.
4. Index your document from the MFP.

Key from Image
1. Split screen allows for efficient attribution of documents.
2. Navigate from document to document for quick on-screen entry.
3. Enter data from on-the-fly database lookups.
4. Add notes directly in the Key from Image window.

Document Types
1. Use different index fields for each document type (resumes, invoices, etc.)
2. Use an unlimited number of index fields per document type and an unlimited number of document types.

Document Definitions
1. Customizable, automated storage and document title creation
2. Easily re-organize and refile any or all of your documents in seconds!
3. Ability to copy Definitions for similar document filing.

Security
1. Role based security keeps information secure for all users.
2. Permissions can be assigned to different folders and can be set so documents are read only or editable giving you easy to manage document distribution.
3. Batch Review can be specific to a Person or a Role.
4. Audit a document to find out activity including who viewed, emailed, modified, printed, etc.

Indexing Service
1. Server-side indexing makes adding, saving, changing or deleting a document fast and efficient.
2. Get instant response when you save the document.

Databases
1. Support for SQL Server, MSDE, and Oracle give you complete scalability with a common and easy to use interface for all databases.

TagSMART
1. ERP integrated solution to invoice document management.
2. With a few clicks, analyze, attribute, and organize invoices.
3. Manage the intake of hundreds of invoices in seconds without templates!
4. Three-way matching function assures that the price, quantity, and amount received matches between the purchase order and the invoice.

BooksSMART
1. Easily view documents stored in INBOOKS while working in your ERP software!
2. Save documents using the data already entered into your ERP software!
3. Search for documents related to a custom value with Related Documents Search.

FormSMART
1. Ability to house fillable forms, and once a form is submitted through FormSMART, it is automatically saved and filed in INBOOKS.
2. Converts a purchase request into a purchase order quickly and efficiently!
3. No username or password required to access—so employees without access to INBOOKS can still fill out forms if needed!
4. Build and reform separate purchase orders from one purchase requisition.

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WorkSMART
1. Automate your document workflow processes.
2. Use automated data lookups to evaluate, attribute and modify documents.
3. Automatically assign document approvers, including the ability to set thresholds!
4. Configure automatic email notifications when a document is pending approval which ensures no document is left behind!
5. Automatically refile documents so you always know what step the document is currently in!
6. Over 20 workflow steps and options for powerful routing, approval, processing and filing.

WebSMART
1. WebSMART provides document access, entry, search and retrieval with INBOOKS through popular browsers.
2. Standard and advanced searching.
3. Document approval from your browser.
4. Upload documents and assign a definition.
5. Data queries for easy indexing.
6. Share document collections with links like popular picture sharing.
7. Secure document access and links.

There are so many more features in INBOOKS. Call us today or visit our website for more information.