

Wholesale, Distribution & Retail Solutions

Products documents
delivery, and other
processes in OnBase.

OnBase
by Hyland

Empower your Retail Business with OnBase

- Core: One-Step Paperless

Retail-Specific Solutions

- Warranties & Conformity Documentation
- Order & Delivery Documentation
- Change Management
- Supplier & Delivery Portal

General Backoffice Solutions

- Contracts Management
- HR Management & Flows
- Acquisitions Management with Budgeting
- Vendor Review, Fleet & Property Management
- Project Management



● Core: One-Step Paperless

**One Solution:
All Documents, All
Processes, All Tasks.**

The Nucleus: **Tasks**

Tasks are the core of 1-Step Paperless. They are anything that needs to get done in the company. They can be contracts with additional documents, they can be simple internal requests for acquisitions. They can even be just an employee asking another employee for advice on a certain project.



The Process

- 1** Any employee can generate a Task. They fill in the name of the task, all the information, upload any necessary documents and select its type.
- 2** The solicitor can then select the appropriate department or specific person the Task needs to go to. They can add a specific message for that person and make a list of subtasks that must be completed by that person before sending it to the next person.
- 3** The person is notified and can see that Task in their tasklist, alongside all the other Tasks they are working on. They can see all relevant information and act upon it. They can comment or modify the document (with track changes), give formal approval or simply reply with their own comments and opinion on it. Then they can send it back to the Solicitor or to another employee for assistance. All from the application interface.
- 4** The Solicitor can always see the Tasks they have created and are therefore responsible for. They can see who is currently working on them to be able to follow-up. Once the work is complete, the Solicitor can either close the task by marking it Done, or send the resulting work (a finalised document, for instance) for approval on preset flows. The Solicitor can change the responsible person for the Task if that is required.

Core: One-Step Paperless

No more email threads, no more lost attachments, no more document searching.



Documents

- Are digitally stored, easy to find.
- Have full change history, comments and even digital sticky notes.



Processes

- Have full history and decision traceability.
- Gain transparency, providing you with an overview of what is happening now.



Employees

- Know what to do with a clear list of tasks.
- Don't waste time searching for documents and doing administrative tasks.



Use Cases

Creating a Contract: A sale is made, and the company must create a new contract. The account manager creates a task called "Contract Customer x", filling in all the information. They send it to the legal department from the app. Employees from the legal department see the request as a task. Based on the details, they compose the contract, upload it and send it back. The account manager sees the task, verifies the contract and sends it to be signed by their superior via the app. The superior sees the task, signs it, and sends it back to the account manager. The account manager uses the 'send-to-mail' button, and sends the contract to the customer. The customer sends it back with changes, and the account manager adds it back to the task with the add-from-mail function. OnBase automatically identifies the customer's changes and displays them. The account manager checks it, approves them, and sends it back to be signed. They receive it back signed from the customer, and can now mark the task as done. The contract is archived intelligently with expiration date to be easily retrievable.

Managing a Customer Request: The customer service representative receives a customer request for a certain document relating to their account. The customer service representative cannot access that document. They create a Task in OnBase, fill in the details, and send it to the person who has access to the specific document in the loan management department. An employee in the department sees the task, accesses it, uploads the required document, and sends it back to the customer service rep. The latter receives the request, sends the document to the customer and marks the task as done.

Acquisition Request: The radiologist in the hospital needs to buy medical equipment. They create an acquisition request Task in OnBase, and send it to the Hospital Manager. The latter sees the task, checks the budget, and approves it. If the price would have been higher, they would have sent it to the financial department for approval in the same way the radiologist did. The radiologist can then place the order and add the invoice to the acquisition request.

● Retail-Specific Solutions

All products, suppliers, partners & customers in one solution.

360° view over every batch & every delivery.

Connect suppliers, contracts, invoices and ERP orders in with one system.



Product Documentation

Each batch or individual product can have tens of related documents regarding **warranties, conformity certification, expiration dates**, and other information about their production. All of these documents can be managed by OnBase. Through **direct integration with the company's ERP system**, OnBase will intelligently **attach all documentation to the orders and batches** within that system. Employees can, thus, **access all OnBase documents directly from the ERP system**. The documents can be found easily by **searching invoices, barcodes, suppliers, orders or customers**. This reduces the time employees spend archiving and retrieving these documents.

Order & Delivery Documents

Keep a repository of all order and delivery-related documents, from **packing slips to import and travel documents**. **Transport partners** can access them through an **online portal**.

From Invoice to Product

With the **Invoicing, Supplier Management, Contracts and Acquisition** modules (see next page), OnBase can be the one place where all product-related information is found, from the order to the delivery confirmation, from warranty certificates to invoices.

Change Management

All **process changes in logistics and stores** can be managed through OnBase, which can become the single repository for **all procedure-related documents**. For any process change, OnBase can **automate the approval process, involving documents, data, approvals and electronic signatures**.

Online Partner Portal

Bring your **logistics partners and supplier** closer through an online portal where **documents and information can be shared**.

System Integration

OnBase seamlessly integrates with all solutions used, ranging from the **ERP platform to niche logistics systems**. Through robust APIs, it **exchanges information meaningfully across systems and interfaces**.

● General Backoffice Solutions

Starting from the 1-Step Paperless Core, pre-defined flows and functions can be added.

These can address a variety of additional specific process-related needs.

With one platform, you can manage every information-related process.



HR Management & Flows

Gain an **overview over all employees and their documents** from one dashboard. Manage **leave requests, vacation days, bonusing** and the company's employee structure. **Employee onboarding and offboarding** is performed from the system, gathering all the information and documents, and integrating with any existing **ID management software**. Use **online employee portals** to communicate processes and receive Leave Requests, **Performance Appraisals**, and any other desired interactions.

Contracts Management

Expand 1-Step Paperless with with functions such as **send-to-mail, digital signature, supplier and third-party portals** as well as **advanced-decision tracing and versioning**. All contracts and additional documents are in one place, connected, easy to find, empowering your company's Legal department.

Acquisitions & Budgeting

Extend the system to **set clear processes for Acquisitions Requests** and Management. **Set and approve budgets** that **guide the acquisition approval flows**. When employees make acquisition requests, the system places them on the appropriate approval flows depending on the acquisition's details.

Invoicing

All invoices entering the organisation are uploaded to OnBase which **understands them** and organises them accordingly. **Gain an overview over all invoices' status** and history all **integrated with accountants' software**.

Vendor Review

Automate the vendor evaluation process and keep **all vendor-related documents in one place**. Gain an **overview of all vendor interactions**.

Property Management

From one dashboard visualise and manage all of the company's property (**vehicle-fleet, machinery, buildings, software licenses**), with all documents in one place. Gain an overview of property-related tasks – insurance & license renewal, maintenance, conformity expiration dates...

Project Management

Manage projects through a **dashboard of tasks, stakeholders, documentation, calendars, and timelines**. Visualise all ongoing projects and their status.

One Platform, All Solutions

The OnBase Platform

OnBase
by Hyland

Robust & Secure: A Solution that You Can Use for Decades

Hyland, the maker of OnBase, updates the solution systematically in order to fix emerging issues and to improve existing functionalities.

Flexible to Your Changing Needs

Through intuitive point & click configuration and without requiring risky and lengthy coding and custom development. We will be there to make sure that it responds to each of your emerging needs, adapting to your organisation's growth.

Integrates with Your Software

OnBase integrates with any core business solutions ranging from Insurance-specific solutions to CRM, ERP and EMS. It can integrate natively or through robust APIs.

Ever-Expanding Capabilities and Functions

Hyland releases large suite updates twice per year, constantly expanding the product's capabilities range and adopting the newest technologies.

A Variety of Interfaces

Mobile, Web, Desktop, Portals or even directly from your ERP or Core application for absolute ease of use.

Extend & Improve



RPA: Hyland RPA

Leverage the power of RPA, training digital robots to perform repetitive tasks across multiple interfaces and applications with OnBase at the core.

Digital Signature

Any eIDAS certified e-Signature solution can be directly implemented in OnBase to embed no-friction qualified electronic signatures on digital documents within the company's processes.

Chatbots: DRUID AI

Use AI Chatbots to facilitate interactions between people and company, be it employees requesting leaves or asking compliance questions or customers asking for help or going through the onboarding process.

Customer Portals with eID

By using Electronic Identification (eID) solutions alongside chatbots and digital signature, the entire process of customer onboarding can be managed through a convenient online portal or mobile application, offering customers absolute convenience.

We are your loyal partners.

We are a team of Certified OnBase consultants with over 12 years of experience in implementing complex IT platforms in large companies.

We are your long-term partners. Your purpose is our purpose.

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