



CONSTRUCTION INDUSTRY SOLUTIONS  
FROM PEGASUS



## Pegasus CIS 5 Document Management

### Complete control of your Documents, in your desired filing structure

The aim of a Document Management system is to eliminate paper wherever that is practical, by storing documents electronically. Equally, a Document Management system is also about generating & delivering documents electronically and for capturing emails, attachments, electronic files and paper documents.

Designed specifically to integrate with Microsoft Outlook®, Word®, Excel® and PowerPoint® desktop products, Pegasus CIS 5 Document Management provides seamless integration with all key Contract Costing data, including Jobs, Customers, Suppliers, Subcontractors, Employees, Stock and Assets.

### Document Types

All types of documents can be stored within the Pegasus CIS 5 Document Management system, including those created within the system such as Sales Invoices, Contract Applications, Purchase Orders, Subcontractor Certificates, etc. This can include all job related documents such as spreadsheets, drawings, presentations, tenders, both inbound and outbound emails, email attachments and so on. These documents are immediately indexed and stored in preconfigured file locations and linked to all relevant Contract Costing entities so that they can be retrieved and reviewed as and when required.

**Document Management**

Store in Document Management | Send

Document Type: Contracts > Procurement > Purchase Invoice

Job Number: 90002

Keywords: 1: Joe Blogs, 2: Steel Beams

Supplier: ABC001

Invoice Number: 2764929

Invoice Date: 12/09/2018

Demo Company

### Automatic Email Monitoring

As part of the Document Management system, the inbound purchase Invoice (and Credit) emails from suppliers can be automatically imported into a pending purchase invoice table within Pegasus CIS 5. The system will extract the base information from that email to create an invoice header together with a link to the email and the invoice attachment. These can be approved and posted in the Pegasus CIS 5 system and the costs analysed against the contracts.

Monitored Document Types

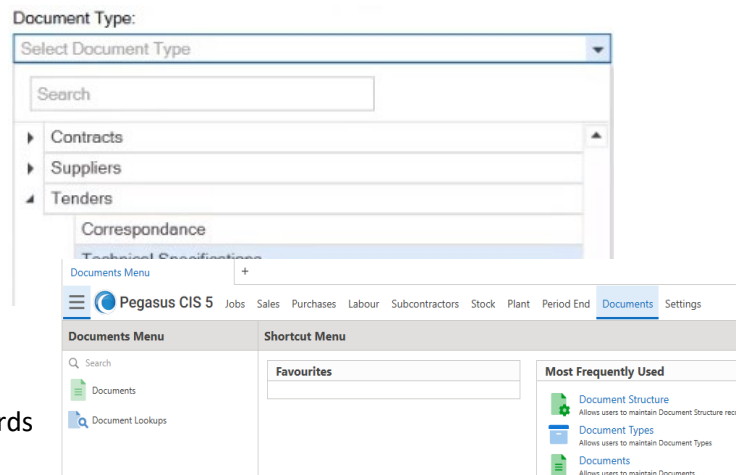
Pegasus CIS 5 | Jobs | Sales | Purchases | Labour | Subcontractors | Stock | Plant | Period End | Documents | Settings

Document Type	Document Type Description	Mailbox Monitoring Enabled	Mailbox Name
PURCHASE_CREDIT	Purchase Credit	<input type="checkbox"/>	
PURCHASE_INVOICE	Purchase Invoice	<input type="checkbox"/>	

## A new way of working

Implementing a Document Management system will have a huge beneficial impact on your business, especially if it is integrated into your back office systems. The benefits will include;

- Reduce costly business administration
- Documents are saved to different contracts within the Costing Systems
- Files kept securely in a central location
- Eliminate document loss
- Increase access to essential information
- Streamline the process with consistent and accurate filing procedures
- It is estimated that there should be a 50% reduction in your print volumes and costs
- Increase in customer satisfaction.



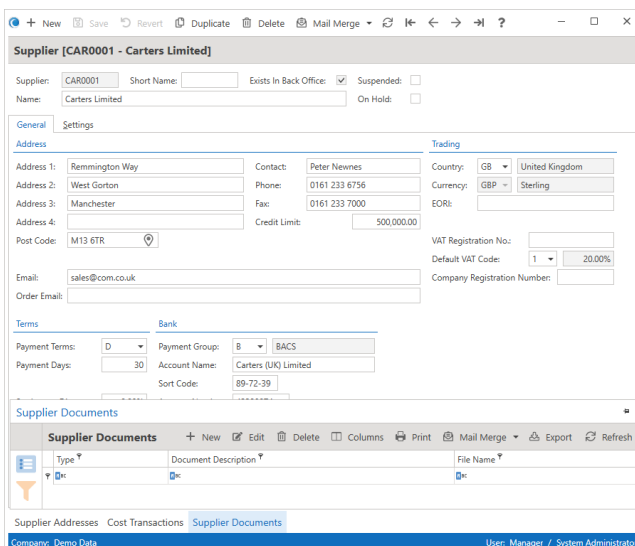
Employing workers and maintaining employee records extends beyond the Payroll and takes the employer into a host of activities that will require numerous documents to be created and maintained such as;

- Health & Safety Risk Assessments need to be performed, maintained and risks managed, this all needs to be documented
- Prove employee ID's by filing documents such as Passport, Driving License, EU Identity Card, etc. Assessment of the legal right for and employee to work in the country along with Employment Contracts
- Record and store Timesheet records.

### Email Management

Important business information is primarily stored in emails and attachments rather than on paper or shared filing systems;

- Time & Accessibility, retrieval times are almost instantaneous and fully accessible
- Emails can be saved to the relevant contract in the correct Pegasus CIS 5 company
- Emails are stored securely with pre-set permissions
- Importantly, emails are shared with those that need access to that information
- This becomes the central point for all email activity with a client.



### Purchasing

The whole of the purchasing processing system impacts contract costing, but this now becomes fully integrated within the Document Management system;

- Estimates, Supplier Quotes, Purchase Orders, Goods Received Notes and Purchase Invoices all fall into the remit of Document Management
- Quality Assessments, Vendor Rating and Terms & Conditions will be linked to the supplier's record
- Subcontractor documents such as Public Liability and Professional Indemnity Insurance all need to be current
- Subcontractor Applications, Certificates, Invoices, Payment Certificates and Payment Statements all need to be retained.



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