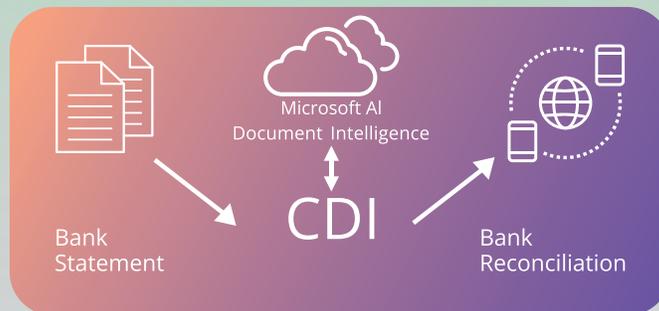
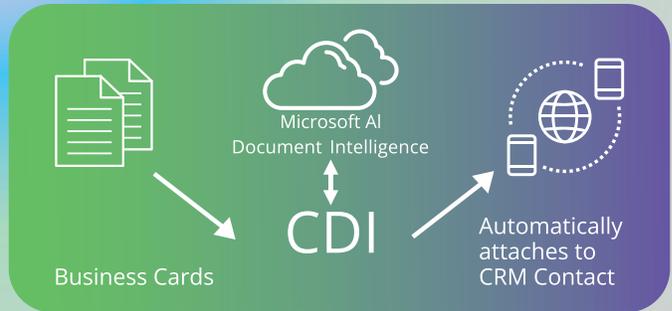
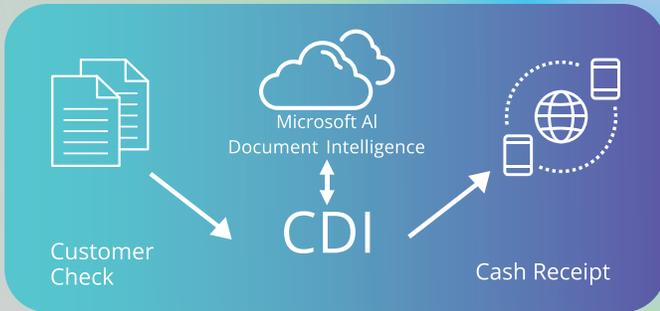
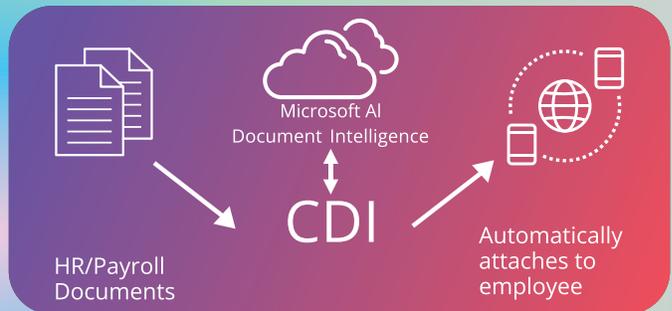
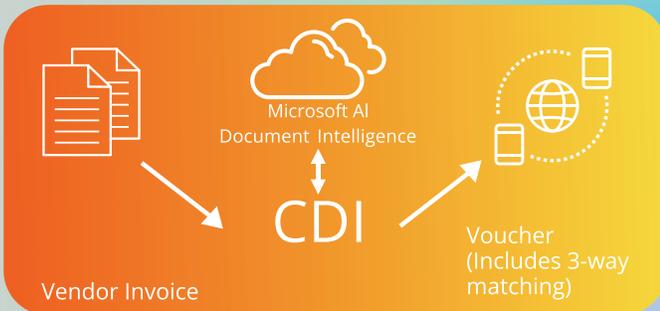
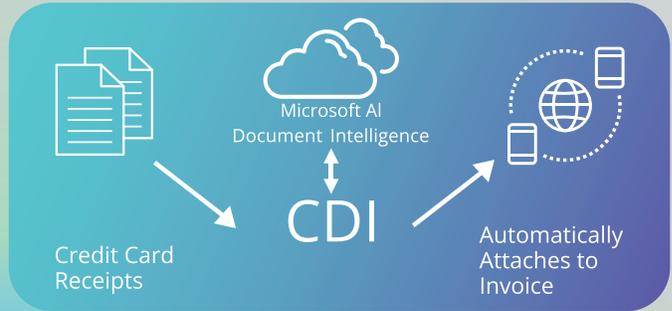
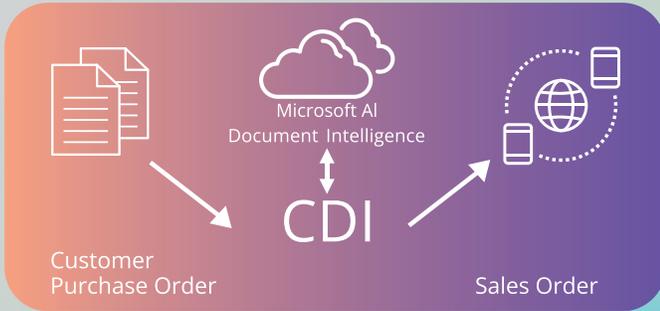
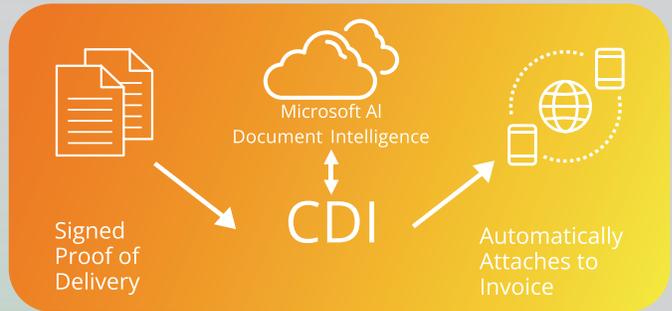
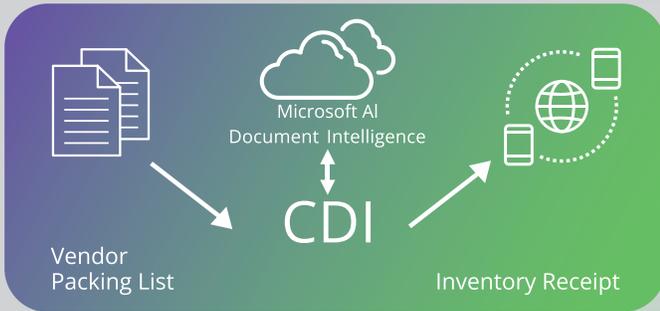


CARILLON® ERP

Carillon Document Intelligence

SOME EXAMPLES:





The ERP Industry is undergoing revolutionary change. AI Document Intelligence is drastically reducing and even eliminating the effort required to enter transactions. Transactions will be generated automatically from emailed or scanned documents/images and then reviewed and approved by staff, to the extent deemed necessary. There won't be robots sitting at desks entering transactions like you might see in the movies. It will all be done automatically, behind the scenes.

CDI indexes and permanently saves documents electronically, in the cloud, eliminating the need for filing cabinets and the retention of paper documents. The need to find an old document in some storage unit or warehouse will never again be necessary. In addition, backups can be geographically disbursed so that even if one cloud facility is damaged or destroyed, your data will still be online, ready to be accessed. Again, this capability is not possible if you store your documents in filing cabinets.

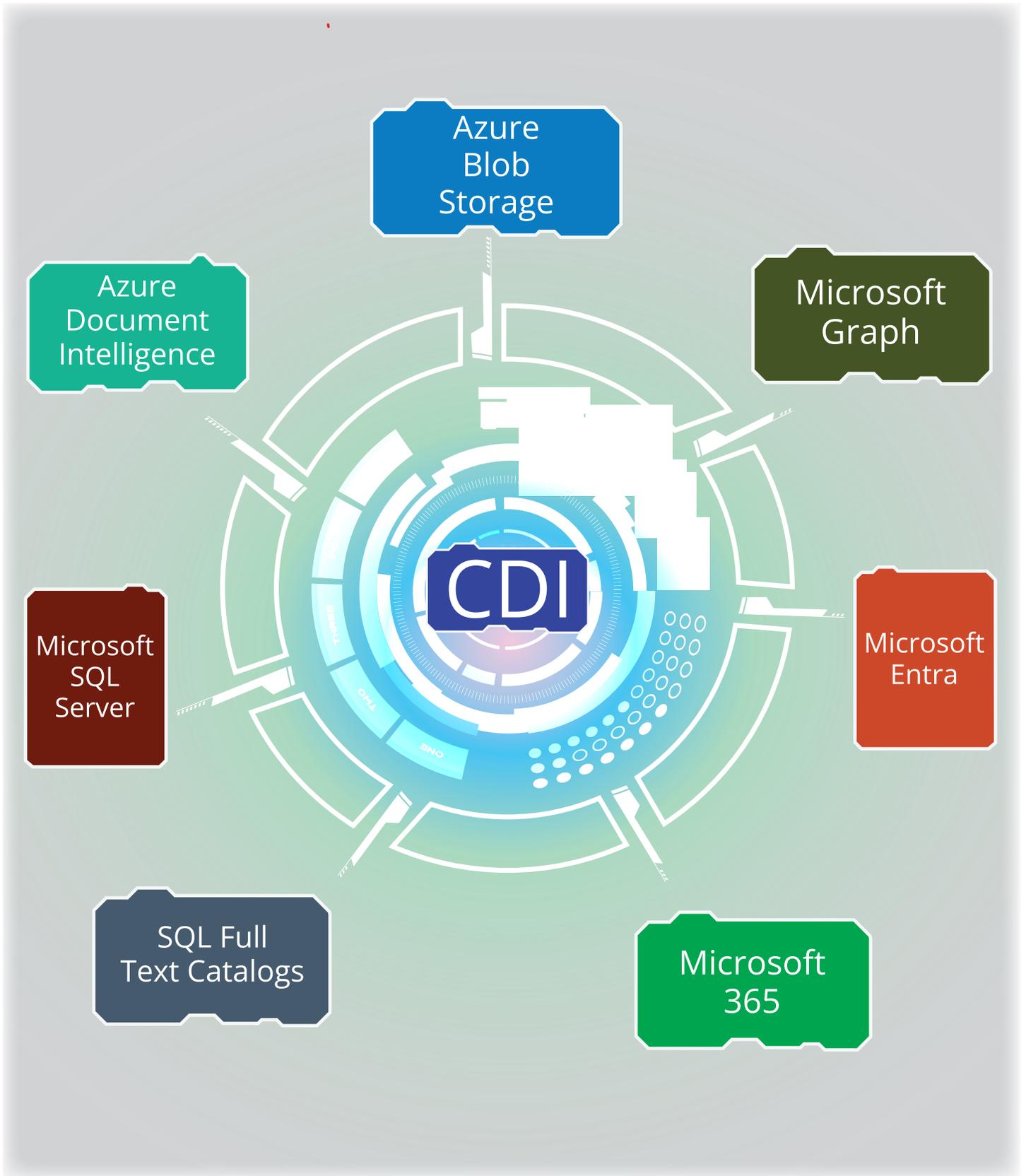
AI DOCUMENT INTELLIGENCE

Carillon Document Intelligence is leading the way by fully integrating these new capabilities throughout the whole Carillon ERP system. A few examples of this functionality:

- Scan a packing slip from a vendor and automatically create an inventory receipt, ready for verification and approval.
- Scan a purchase order from a customer and automatically create a sales order, ready for approval.
- Scan a vendor's invoice and automatically perform 3-way matching against the purchase order, inventory receipt, and vendor's invoice to automatically create a voucher, ready for approval and payment.
- Scan a customer's check and automatically create the cash receipt.
- Scan a bank statement and automatically flag deposits and checks as "cleared". It will even automatically create general ledger transactions for fees and interest.
- Scan signed credit card receipts and attach the scanned document to the invoice in the Carillon ERP system.
- Scan proof of delivery documents and automatically attach the documents to the appropriate transactions.
- Process HR/Payroll documents automatically, update the payroll system automatically, and electronically attach the documents to the employee.
- Scan business cards that update Carillon's CRM system automatically.
- Any incoming document (paper or email) can be run through an AI custom model that can be trained to create any transaction or workflow you can imagine.

Carillon Document Intelligence will be eliminating the need for almost all manual data entry.

TECHNOLOGY:



POWER SEARCH

Carillon CDI includes Power Search capabilities that allow you to search for any word(s) or phrase(s) in any document scanned into the system—even handwritten notes! With CDI Power Search, you can search through all documents for any word or multiple phrases ever saved in the system and quickly view all matching documents that contain those phrases. This functionality is not possible with traditional filing cabinets and is incredibly useful. Integrating with Microsoft AI Document Intelligence, every document scanned or emailed into the CDI is analyzed, enabling you to search, view, and process documents with unmatched speed and accuracy.

WIN65080 - CDI Power Search

Criteria Timestamp

Company ID: 01 To: zzzzzzzz
 Date: 01/01/50 00:00:00 To: 12/31/49 23:59:59
 Image Container: Vendor Invoice
 Image Type: All
 Search Phrase: polo

Company ID	Image Container	Image Type	Date Received	AI Vendor Name	Voucher Number	Voucher Company ID	Voucher Vendor ID	Voucher Vendor Name	Description	Original Filename	Original File Extension	Emailed	Processed	
01	VENDORINVOICE	Vendor Invoice	08/13/24 14:38:41	Bankers Advertising Company						2024-08-02 16-03.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/13/24 14:38:23	Bankers Advertising Company						2024-08-02 16-02 1.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/13/24 14:38:17	Bankers Advertising Company						2024-08-02 16-01.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:57:53		25161	01	6613	Bankers Advertising Con		NFR23111_998000108_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Statement	08/11/24 23:52:29		23797	01	6613	Bankers Advertising Con		NFR23111_220073189_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:48:59		25358	01	6613	Bankers Advertising Con		NFR23111_220072910_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:48:59		25357	01	6613	Bankers Advertising Con		NFR23111_220072909_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:48:57		25351	01	4259	Tru Art Color Graphics		NFR23111_220072905_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:46:11		25243	01	6613	Bankers Advertising Con		NFR23111_220072706_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Vendor Invoice	08/11/24 23:46:11		25241	01	6613	Bankers Advertising Con		NFR23111_220072704_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Statement	08/11/24 23:32:52		23712	01	6613	Bankers Advertising Con		NFR23111_220070996_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Statement	08/11/24 23:32:51		23710	01	6613	Bankers Advertising Con		NFR23111_220070994_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
01	VENDORINVOICE	Statement	08/11/24 23:30:45		23596	01	6613	Bankers Advertising Con		NFR23111_220070881_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch

Results Timestamp

WIN65080 - CDI Power Search

Criteria Timestamp

Company ID: 01 To: zzzzzzzz
 Date: 01/01/50 00:00:00 To: 12/31/49 23:59:59
 Image Container: Vendor Invoice
 Image Type: All
 Search Phrase: polo

Menu Home 473713D0-57DD-45F9-9... x + Create

All tools Edit Convert E-Sign Find text or tools Share

INVOICE

Remit Payment To:
Bankers Advertising Company
 2800 Highway 6 East/P.O. Box 2887
 Iowa City, IA 52244 Phone: 800-777-1896
 Phone: 319-354-1020 Fax: 319-438-0943

Invoice Number: 833570
 Invoice Date: 04/25/24

Bill To:
 CARILLON FINANCIALS CORP.
 7300 STATE HIGHWAY 121, STE 300
 MCKINNEY, TX 75070-1991

Ship To:
 CARILLON FINANCIALS CORP.
 7300 STATE HIGHWAY 121, STE 300
 MCKINNEY, TX 75070-1991

Order Date	Ship Date	Ship Via	Tracking Number	Due Date	Sales Contact / Phone Number
04/17/24	04/23/24	UPS GROUND		05/25/24	Beyond Your Brand... 800-777-1896

Our Order Number	Acct. No.	Terms Description	Your Purchase Order Number
636129	159071	Net 30	

Ordered	Shipped	Item Description	Unit Price	Extended Price
2	2	POLO LADIES MICRO TEXTURE BLACK - SMALL TRACKWEAR - SMALL	33.6500	67.30
2	2	POLO LADIES BROKEN STRIPE CAYENNE - SMALL	38.1500	76.30
1	1	JACKET LADIES OTTOMAN BLACK - SMALL	62.0000	62.00
5	5	EMBROIDERY RUN CHARGE-5,000 STITCHES EMBROIDER LEFT CHEST 1543 BLUE ON TRADEWIND WHITE THREAD ON BLACK CAYENNE LESS THAN MINIMUM CHARGE	8.6500	43.25
1	1		15.0000	15.00

Filename	Original File Extension	Emailed	Processed	
16-03.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
16-02 1.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
16-01.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Launch
98000108_		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20073189_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20072910_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20072909_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20072706_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20072704_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20070996_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20070994_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch
20070881_		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Launch

DOCUMENT IMAGING

Carillon Document Intelligence also provides all the functionality of a document imaging and retention system eliminating the need for filing cabinets.

- Subject to strong security, any user can launch any document immediately from the Carillon ERP system. There is no need to purge documents like you would have to do with file cabinets so clients can easily access documents no matter how old they are. A few examples:
 - Save and launch Excel spreadsheets as backup for journal entries.
 - Launch vendor invoices that the vendor has emailed directly to the Carillon Document Intelligence system.
 - Save artwork or drawings to a repository and maintain revision history. Attach them to sales orders, customers or items. Optionally require Check-Out and Check-In functionality for document containers.
 - Save contracts and associate them with customers and/or vendors.
 - Save all HR and Employee related documents such as applications, W-4s, I-9s, etc. and attach the documents to employees or applicants.
- Utilizing Microsoft AI Document Intelligence, even handwritten documents and signatures are able to be interpreted and saved to the ERP system.
- All documents are encrypted so a security breach still won't give anybody access to your documents that isn't supposed to have access to them.



Launch Button within a window in Carillon



What's evil about filing cabinets?

Filing cabinets may seem like an old-fashioned, reliable choice for document storage, but they pose significant challenges in today's fast-paced and security-conscious world. For starters, they offer minimal security-anyone with access can view or remove sensitive files, making confidential information vulnerable. In terms of disaster recovery, physical documents are at high risk, with fires, floods, or other calamities potentially leading to total loss, unlike digital backups that are easily recoverable. Sharing a single document among multiple people becomes a hassle; instead of immediate access, it requires physical handoff or copying, which is inefficient and increases the risk of errors or loss. Finally, the process of filing and printing every document takes up time, paper, and storage space, ultimately wasting resources and slowing down workflows. All things considered, filing cabinets are an outdated burden for modern organizations.



Visit:
www.CarillonERP.com
or call us at 800.739.9933
for more information today!

Carillon ERP

1.800.739.9933 | www.CarillonERP.com | Sales@CarillonERP.com

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