



Correspondence Tracking System for SharePoint

Any organization that receives mail, email and/or fax correspondence knows how difficult it can be to efficiently distribute the correspondence to the correct person or department for handling. It's even more difficult to track whether a particular item is still in process or has been completed—let alone by whom. Further, what about the organization's communication history with the correspondent or the historical records of other items pertaining to the same topic?

Paper piles...overflowing email in-boxes...fax pages flying around...

There's a better way!

The **Correspondence Tracking System for SharePoint** combines the best tools from Microsoft and INDICIUM Software, Inc. to form a solution to alleviate the problems of correspondence processing.

Based on MS-SQL, MS-Office, and Microsoft Windows SharePoint Services, the **Correspondence Tracking System for SharePoint** is cost-effective, easy to maintain, and flexible to meet the unique needs of each organization. This web-based document management application enables electronic collaboration across desks, departments, or organizations, with seamless inclusion of document images, fax, and email in the repository.

By scanning all paper correspondence immediately upon receipt to create images, paper shuffling ends at the door. Images of paper and fax, along with email inquiries are stored within the Microsoft database for categorization, routing and archival. Customized and/or restricted views of the information can be created based on access and security levels.

The new workflow begins with a staff member scanning paper correspondence into the system, where a log number is automatically assigned as the image is stored in the SharePoint document repository. Incoming faxes from a fax server and email correspondence are similarly logged and stored.

A user reviewing the incoming correspondence queue within the system will search the database to determine if the correspondent is already there or if they must be added. After classifying the correspondence by type, they will determine if they will handle the matter themselves or forward the correspondence to another staff member or outside organization for follow-up.

www.INDICIUMSoftware.com

Benefits:

Improve operational efficiency



Process thousands of pieces of correspondence per day



Track and research millions of pieces of correspondence in a historical database



Eliminate ALL paper from both processing and storage



Improve response time to correspondents



Eliminate faxing/emailing documents between individuals/departments



Process all correspondence electronically

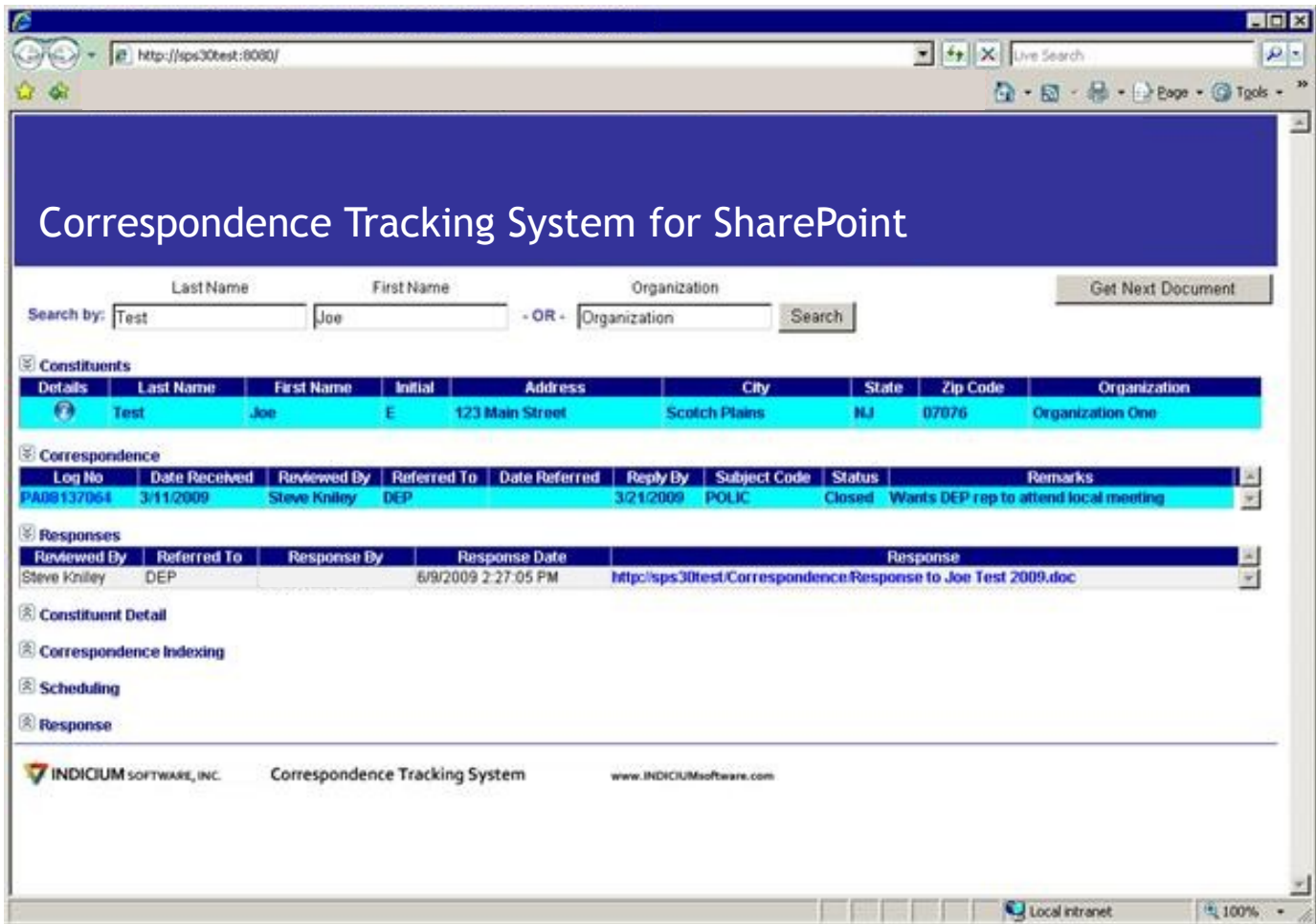
Correspondence Tracking System for SharePoint

When a user responds to an item in the queue, they use MS-Word to create and send a response letter to the correspondent. A copy is stored in the document repository, the status of the item is changed to “closed”, and it is removed from their work queue.

If the correspondence is reassigned to an outside organization for handling, the external user can simply access the item in their private work queue on the web to provide an appropriate response. Within the application, they can simply upload a copy of the response document and it is automatically added to the document repository; the item status is changed to “closed”, and it is removed from their work queue.

All responses created and uploaded are linked to the original incoming correspondence for quick and easy retrieval.

At any time, the staff can see the full history of correspondence with a correspondent or about a particular topic.



Correspondence Tracking System for SharePoint

Search by: Last Name: Test, First Name: Joe, Organization: Organization

Constituents								
Details	Last Name	First Name	Initial	Address	City	State	Zip Code	Organization
	Test	Joe	E	123 Main Street	Scotch Plains	NJ	07076	Organization One

Correspondence								
Log No	Date Received	Reviewed By	Referred To	Date Referred	Reply By	Subject Code	Status	Remarks
PAD8137064	3/11/2009	Steve Kniley	DEP		3/21/2009	POLIC	Closed	Wants DEP rep to attend local meeting

Responses				
Reviewed By	Referred To	Response By	Response Date	Response
Steve Kniley	DEP		6/9/2009 2:27:05 PM	http://sps30test/Correspondence/Response to Joe Test 2009.doc

INDICIUM SOFTWARE, INC. Correspondence Tracking System www.INDICIUMSoftware.com

About INDICIUM Software, Inc.

INDICIUM Software, Inc. is a leading provider of document capture, management, and workflow software products to manage documents electronically and automate business processes.

The INDICIUM product suite is distributed through a network of solution providers to clients in numerous industries. For more information, visit www.indiciumsoftware.com, or contact sales@indiciumsoftware.com or your INDICIUM reseller.

Your INDICIUM Reseller:

