



Make Your Payment Process **Stress-Free**

Paperwork done right, in less time with custom Doc Rules

Getting the right documents to the right people at the right time on all your jobs is complicated and time-consuming. Doc Rules give you the power to make sure your company's needs are met in less time. Create custom rules to prioritize tasks, send documents automatically to meet all your deadlines, and cut out the busywork.



Doc Rules helped my team meet our deadlines so we're protected, giving us time back to build our business and customer relationships. I highly recommend Doc Rules to any company seeking to be more efficient, effective, and productive.

John Deleon
Travis Roofing Supply

Use custom rules that match your business needs

Set and forget the documents that don't need review and prioritize the documents that do. Use Doc Rules to choose which documents should be handled automatically by Levelset and when. This creates a custom, prioritized "to-do" list for you to easily approve, cancel, or snooze documents - taking the guesswork out of managing jobs.

Your Document Queue			
Mechanics Lien	Project 1	Balance \$10,165.15	Expires today
Notice of Intent to Lien	Project 2	Balance \$7,504.00	Expires in 10 days
Preliminary Notice	Project 3	Balance \$14,204.28	Auto approves tomorrow
Preliminary Notice	Project 4	Balance \$7,562.30	Auto approves tomorrow

Automation based on your preferences

Stay in control while saving time as Doc Rules run in the background. There are three levels of processing:

- ✓ **Hands-Off:**
Documents are automatically prepared and sent based on your preferences.
- ✓ **Low-Touch:**
Your Queue will make suggestions and fulfill documents based on your preferences, but you can approve, snooze, or dismiss before a document is sent.
- ✓ **Hands-On:**
You receive suggestions and handle documents on a case-by-case basis.

The screenshot shows the 'Preliminary Notice Document Rules' configuration page in the Levelset system. The page is organized into several sections, each with an 'Edit' button:

- States:** California, Florida, and Texas
- Locations:** Main Office
- Project Types:** Public Jobs, Private Jobs
- Project Amounts:** Outstanding amount greater than \$0 and Contract amount greater than \$0
- Timing:** 14 Days before notice deadline, 0 Days after last unpaid invoice
- Review period:** 5 Days
- Processing:** Radio buttons for Automatic, Opt-In (selected), and Opt-Out

Customize your Doc Rules based on:

- Outstanding invoice amount
- AR data (how far past due)
- AP data
- State
- Branch
- Line of business
- Contract value
- Job type
- And more

Our whole team is [here to help you.](#)

Log in to your account and connect with your Payment Expert to learn more.

 [Levelset.com](https://levelset.com)

 [855-927-2737](tel:855-927-2737)