

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.

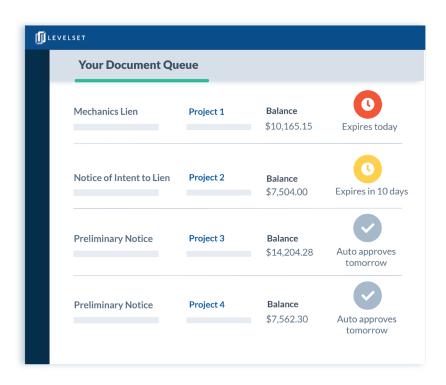
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Doc Rules helped my team meet our deadlines so we're protected, giving us time back to build our business and customer relationships. I highly recommend Doc Rules to any company seeking to be more efficient, effective, and productive.

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.



Automation based on your preferences

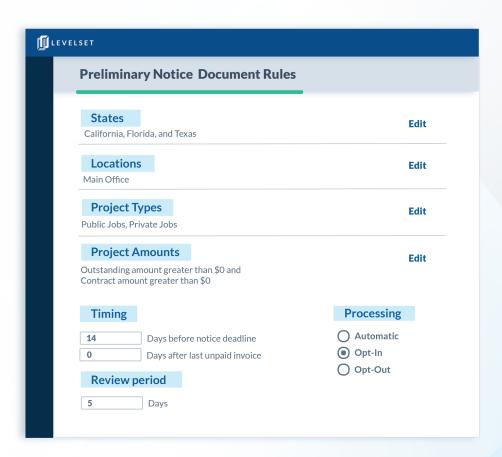
Stay in control while saving time as Doc Rules run in the background. There are three levels of processing:

- 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.



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

