

The background of the page is a photograph of two people in an office setting. A man with a beard, wearing a dark blue long-sleeved shirt, is leaning over a desk and pointing at a large computer monitor. A woman with curly hair, wearing a green button-down shirt, is sitting at the desk and looking at the monitor. The scene is brightly lit, suggesting a window in the background. A teal semi-transparent overlay covers the bottom right portion of the image, containing the text.

Best Document Automation Software

How to Choose Guide

The Best Automation Software



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How to Choose Guide

Studies indicate an inefficient contract system for businesses can make them lose up to [40%](#) value while automating and managing them the right way can save over 80% time and improve their value. That sums up the need for choosing the best document automation software. Integrating the right one into your existing applications require expert guidance to help you make the right choice. Since you cannot hire an expert to choose for you, this guide will come in handy. First of all, know that not all software solutions are made the

same. You can't just pick the first tool you come across and expect to achieve the results you have heard automation can produce. Here's a systematic approach to choosing the best system.

First Evaluate Your Automation Needs

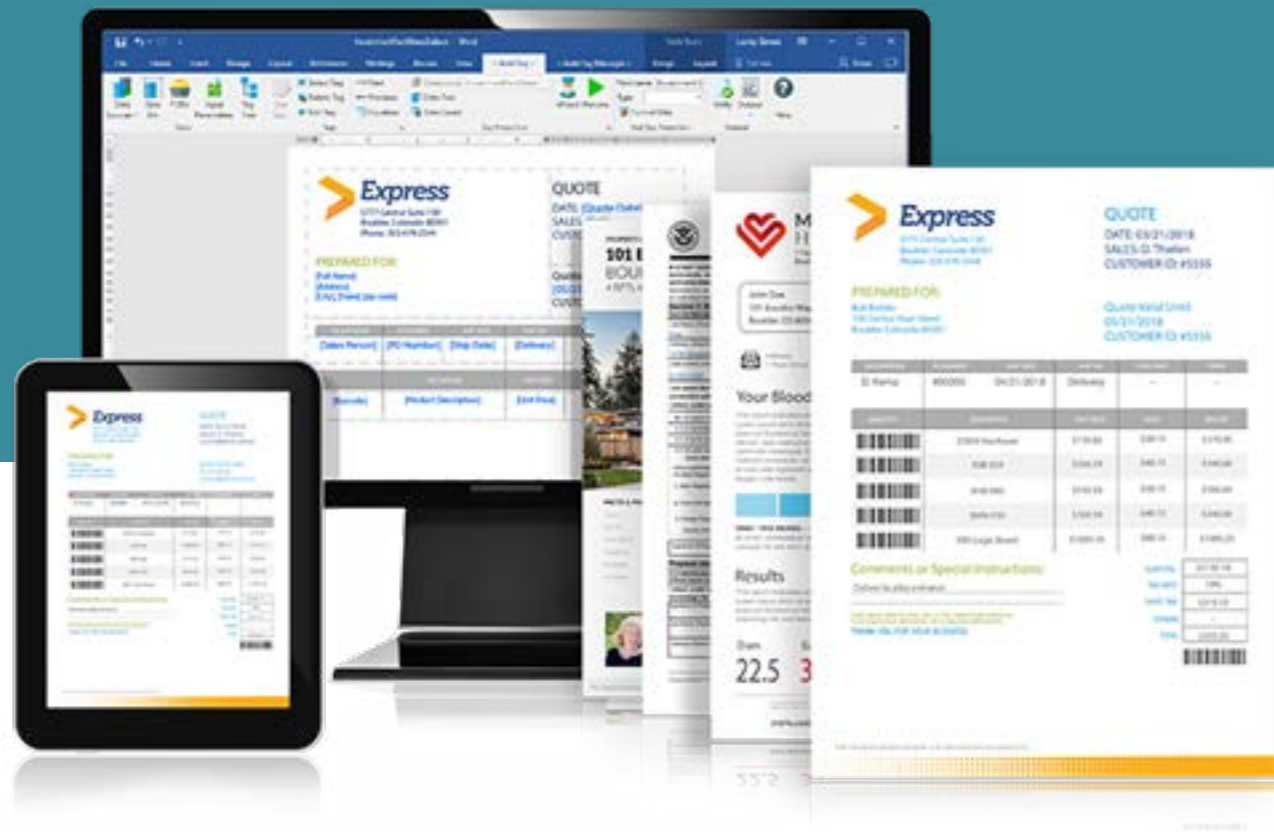


Common Documents

- Financial statements and reports
- Pharma clinical study reports
- Onboarding documents
- Insurance policies
- Contracts
- Invoices
- Customer profiles
- And more

It should be safe to assume that you're not going to automate all the documents your organization uses. That would become a very expensive project and yet there may be documents you only use once in a while. Make a list of important documents that you use repeatedly and that would make a big difference if they were automated. The kind of industry you are involved in will play a key role in determining your automation needs.

It is advisable to get your staff involved in this process. Ask what they consider the most urgent automation need. Every department will have particular documents they find that take up the most time and yet they are important. This process will help in defining what the best solution would be. You should understand there's no one size fits all, so define your needs, and then match it to the software.



Do Extensive Research and Get a Free Trial

To match your needs with the solution, you have to browse different vendors and see what they have to offer. Read reviews, get recommendations, and if possible, try out the best options. There are hundreds of vendors out there, but you cannot go through all those products. Limit yourself to the top-recommended options and then look for the ones that meet your needs. Other factors will determine if they are the best.

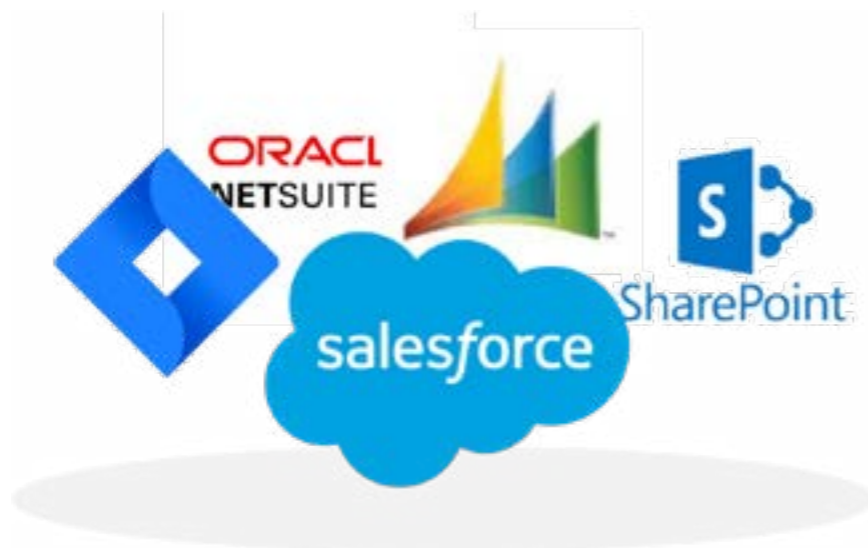
The Best Software Has a Simple User Interface

Think of the people who are going to use this software. What are their specialties and how proficient are they with technical stuff? Remember that the purpose of the document automation system is to make their work simpler and not complicated. One of the reasons new technology fails to fulfill its intended purpose is because it is too complicated. Employees will get frustrated and return to the old way of doing things if the new technology is complicated.

Choose one that is clear and easy to navigate through. Your staff should find it easy to get acquainted and go on to use the tool without having to frequently check a manual or IT person every time they try to use it. Some of the best solutions will have an interface that is not too different from common applications that everyday

employees use like MS Office. You can read customer reviews to find out what the user experience was like for other buyers. You also have the option of trial versions that most reputable document automation software vendors provide.

Choose a System with Extensive Integration Options



What tools, apps, and software do you already have within your organization?

What tools, apps, and software do you already have within your organization? Are you ready to abandon those and buy new ones just to be able to automate your documents? This is a big consideration to make. Some software will not integrate with many other systems. That can pose a big problem not just financially but even for the people who have to use them.

Imagine what it would be like if you had to purchase a new CRM because the document automation system you chose does not integrate with the one you're already using.

Best in class systems take integration seriously and they have come up with solutions that integrate with

the popular platforms that are used by most businesses. For instance, some will allow you to continue using programs like Microsoft Word, PowerPoint, and Excel. For sales departments, they should be happy with the software that integrates with Salesforce. Accountants will want to continue using Quickbooks, so consider such things. If you're a big business with many departments, you will need more integration options. Studies also show that [67% of workers](#) prefer to view all their tools in a single window. Such integration options should be taken into account.



Examine Collaboration Features

The success of a document automation system depends on its ability to enhance collaboration. Different people are likely to access the same document from different locations and you want this to be possible with the least amount of interruptions. It would be best if collaboration is seamless.

Find out how collaboration is made possible. Will someone have to log out for another to access the document? You can see how inconveniencing that would be. You also want to have changes made in real-time so that you do not end up with outdated information just because you did not log out and then login again to see changes made to a document.

The collaboration features should make it possible to get work done much faster than it would have been if you had to walk from one office to the next with a physical file. According to statistics, advanced cloud-based [software improves revenue by 15%](#).

A simple feature like notifications can make a world of difference because if you need a document signed, the moment it is sent to the signatory, they will get a notification, this prevents a scenario where you're waiting for the signature or [information](#) and the other person has no idea until you give them a call.



Language Options

As you examine the options for collaboration, you would also need to consider what language options are available. We live in a global community but we speak different languages. If you wish to collaborate with someone in a different country, it would be great if they did not have to struggle to translate the document to a language they understand.

The best software considers this and comes with automatic translation. The person on the other side will receive a document and it will appear in the language they have set their computer in. Sometimes they will need to choose the translate option just like Google offers.



Security Should be Paramount

Data theft is a common concern for many businesses that are adopting new technology. Not every software vendor will provide the kind of security you need for your business documents. Also, many businesses may not know what would be the best security options for them. Research data safety within your industry. Some industries need much more security than others especially if you are going to have collaboration between people in different locations.

Access control should be possible at different levels, this means certain documents will only be accessed by people with a particular clearance level. The security however should not become an inconvenience. Multilevel security at times can become a burden if every time you want to access a document, you have to undergo the same tedious process.

Some security features you should consider include:

- End to end encryption
- Password protection
- Automated password protect prompt
- Automated encryption

The best solution will integrate seamlessly with your existing security infrastructure and relies on it, so you don't have to worry about upgrading or adjusting the environment.



Administrative Control Will Provide Extra Security

Administrative control is a feature that allows you to determine what kind of access different people within the organization have. Some people may only be able to read certain documents while others can have access to edit documents and others can do everything.

Some software also allows for temporary access to certain documents. This is a great feature when collaborating with an outsider. For example, if you hire a legal expert to help create a contract template, you can grant them access for the period that they are doing this work and when they are done, the access will expire.

Administrative control can also be used when an employee leaves the business. You can simply deactivate their access to documents and not have to worry about them leaving with important information.



Flexible Customer Support

Most software vendors have customer support, but you need to consider how effective it is. Flexibility in communication is important. A vendor that provides only one way to contact customer support may not be as efficient as one with several channels. Some of the common ways to contact support are email, live chat, phone, social media among others. Consider what would be most convenient for you.

Reading reviews can give you insight into how efficient their customer support communication is in the first place. This is one of the most common things users comment about. You can also try contacting support even before making the purchase (while you're trying their product). You will be able to see the kind of reception you get and decide if it is impressive enough.

At the same time, do not use customer support as a make or break condition when choosing the best vendor. Some vendors with average support are still able to deliver great products.



Connecting to Datasources Matters

Document automation depends greatly on the ability to capture information from different datasources. Not every software can do this efficiently. You need to verify what sources the software can retrieve data from. The best system can capture data from several sources.

Using advanced features, the software extracts information and validates it before entering it into a template. This data can then be retrieved easily when you need to use it to generate a document. It is a good idea to test the system before you commit to the software because some vendors may make the claim but fail to deliver on that promise. There can be cases where the system fails to interpret the data either because of the format or some other incompatibility issues.



Consider Scalability

At what level is your business? Are you still looking at further exemption? This can play a part in determining how appropriate particular software is. Sometimes you might stumble upon what seems like the best solution for your business, but as your business grows, you realize the software can no longer handle the growing demands that you have.

You can also look at the possibility of updating software. Find out what is involved. At times what seems like an affordable system, has a hidden cost in the upgrade. This is a common practice so you need to know if it is something you can afford. For example, if your business is growing, you may need to upgrade to enjoy certain features like having more users.



Compare Prices

Although prices may vary, you will notice that the variation is not that much for what would be considered the best automation system. If the price is unbelievably low but with a lot of promises being made, you might have to do more research on that software since most "too good to be true" deals have a catch somewhere. And, check if the price is much higher than the rest with very little justification, it may be better to try a different option.

You will also find some free software. These can serve as entry-level solutions or if you do not have huge document demands. For most businesses, free or open-source software will not meet your expectations since they provide basic document generation.

Conclusion

Remember, there is no one size fits all. The success you will have in selecting the best automation software for your documents will depend on understanding your needs and then doing research to find one that meets the demands. Of course, there are some reputable names in the industry that you could try out, but make sure it is not an overkill since some of them may have features your business may never utilize. By explaining what you're searching for, the support team can help you decide whether they are the right choice for you.

