



Records Management

What electronic systems are dealerships using?

Compiled by: Elizabeth Marvel, Office Technology Magazine

Following is a question submitted by a dealer member as part of BTA's Dealers Helping Dealers resource and many of the answers received. These answers and others can be found in the members-only section of the BTA website. Visit www.bta.org/DealersHelpingDealers. You will need your username and password to access this member resource.



What electronic records management (ERM) system is recommended for a dealership and why?

"We use DocuWare. They are early to the market with intelligent indexing and intelligent document processing is going to be a game changer."

Luke Ubelhor, director

Donnellon McCarthy Enterprises, Cincinnati, Ohio

"e-automate."

Tyler Best, president

Abadan, Richland, Washington

"We use Microsoft Teams. The cost is included with our Microsoft 365 [subscription]."

Christina Morgan, president

TDSiT, Lowell, Arkansas

"We recommend [ECI's e-automate] as our electronic records management system because it provides seamless integration across our dealership operations, allowing our sales, service and accounting teams to securely store, organize and retrieve documents in one centralized platform. e-automate's built-in workflows, role-based permissions and retention policies support compliance requirements while improving efficiency. This integration streamlines processes, reduces administrative time and ensures our team can quickly access accurate records to deliver a better customer experience."

Tony Sanchez, president

C3 Tech, Santa Ana, California

"We're going to DXone."

Chip Miceli, CEO

Pulse Technology, Schaumburg, Illinois

"While I don't work in the office technology space, I can speak from the technology/MSP perspective. In this environment, I recommend adopting a layered approach with ConnectWise Manage at the core. ConnectWise functions as the central system of record, managing tickets, projects, contacts, companies, sales orders, purchase orders, inventory, history and the sales funnel. Around this, we layer in complementary tools such as RMM, SIEM, backup and documentation solutions, all of which integrate tightly with ConnectWise. ConnectWise can also integrate with common solutions in the copier space, such as e-automate, to help assist with uniformity among the admin team."

David Priestley, director of managed services

Donnellon McCarthy Enterprises, Cleveland, Ohio

"We utilize what we sell — Square 9. In addition, we fully utilize SalesChain."

Mike Boyle, president

Base Technologies, Bethel, Connecticut

"We use Digitech for all our lease files and our A/P, but we are a Digitech reseller."

Chap Breard, owner

MOEbiz, Monroe, Louisiana

"Ultimately it is one that works best for your dealership. e-automate is probably the best known and most used, but there are custom options available as well. It must work with your goals."

Brian Bence, executive director of sales

SVOE, Verona, Virginia

"We use Square 9 for document management and use Adobe solutions for electronic contracts, etc."

Ron Hulett, president

U.S. Business Systems Inc., Elkhart, Indiana

"e-automate."

Brian Olson, vice president

Kopy Kat Copier, Aurora, Illinois ■

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