

DIGITAL FILES/DOSSIERS

- ✓ Digital case management
- ✓ Pre-configured file and document types
- ✓ Manual and automated file creation (ERP/CRM integration)
- ✓ 360° navigation via tree view
- ✓ Configuration via form editor (no code)

DOCUMENT MANAGEMENT

- ✓ User-friendly interfaces
- ✓ Microsoft 365 Office integration (e.g. document collaboration)
- ✓ File and document versioning
- ✓ Restore previous versions
- ✓ Multi-format viewer (over 300 formats)
- ✓ Task and resubmission capability
- ✓ Linking of files and documents, files and files, documents and files, and documents
- ✓ Client separation possible
- ✓ Filing from Outlook, uploading and drag-and-drop
- ✓ Copy and move files and documents
- ✓ Combined metadata and full-text search
- ✓ Favourites storage and search filters
- ✓ Excel export of hit lists
- ✓ Document storage in customer's Microsoft 365 tenant

DMS SERVICES

- ✓ OCR and full text indexing
- ✓ Format conversion (e.g. Word to PDF)
- ✓ Splitting, merging, barcode processing
- ✓ Document generation using Office templates
- ✓ Scanning & recognition

INTEGRATIONS

- ✓ ERP integration (Dynamics 365, SAP, ...) for document storage/archiving
- ✓ Microsoft Teams / Power Platform / Syntex
- ✓ Reporting via Microsoft Power BI
- ✓ Web Services via REST/Microsoft Graph
- ✓ Azure Open AI (ChatGPT)
- ✓ Outlook
- ✓ Master data synchronisation with third-party systems
- ✓ Digital signatures (DocuSign, Adobe Sign)
- ✓ DMS search via Microsoft Bing

AI FEATURES

- ✓ Automatic summarisation of data
- ✓ Automated translation

ARCHIVING

- ✓ GoBD-compliant, audit-proof archiving
- ✓ Configuration via Microsoft Purview
- ✓ Process documentation possible

PROCESSES & WORKFLOWS

- ✓ Document-centric workflows
- ✓ Rules-based and ad-hoc workflows
- ✓ Approval processes
- ✓ Graphical workflow configuration
- ✓ Working with Power Automate

REPORTING

- ✓ Lists, groupings, totals
- ✓ Graphical views and charts
- ✓ Excel export
- ✓ Customisable