DocMan

Electronic Document Management System

What is Document Management

- Document Management is the process of arranging documents in a way that is easily managed by individuals.
- A Document Management System/Software helps you organize your digital documents and digitize your existing paper documents to eliminate the clutter and issues of a disordered or manual system.

Why You Need Document Management

- To Eliminate paper-based filing systems
- To make working from anywhere easy and efficient.
- To safe-guard files from theft/damage/espionage.
- It makes it easy to scale your business with the changing times.
- To reduce space consumed by Manual Filing Systems
- Retrieve Documents Faster and more efficiently.
- To have more secure document access restrictions
- Improve work collaboration within your organization
- To improve document audit trails
- Eliminate duplicate Files/Folders

DocMan

- DocMan is a premiere document management solution that specializes in intelligent organization and automation of essential business documents and processes. It is a dynamic platform that operates both online and locally.
- More than simple storage of digital files, DocMan leverages a superior interface and quality of life features to make businesses more profitable by saving time and money.

A Central Location For All Your Documents

A System Where Documents File Themselves

A Secure File-Sharing Platform

Utilizing DocMan Workflows and Zonal OCR you're able to automate your processes

DocMan helps you intuitively upload, edit, and find your documents seamlessly, not just store them in folders online.

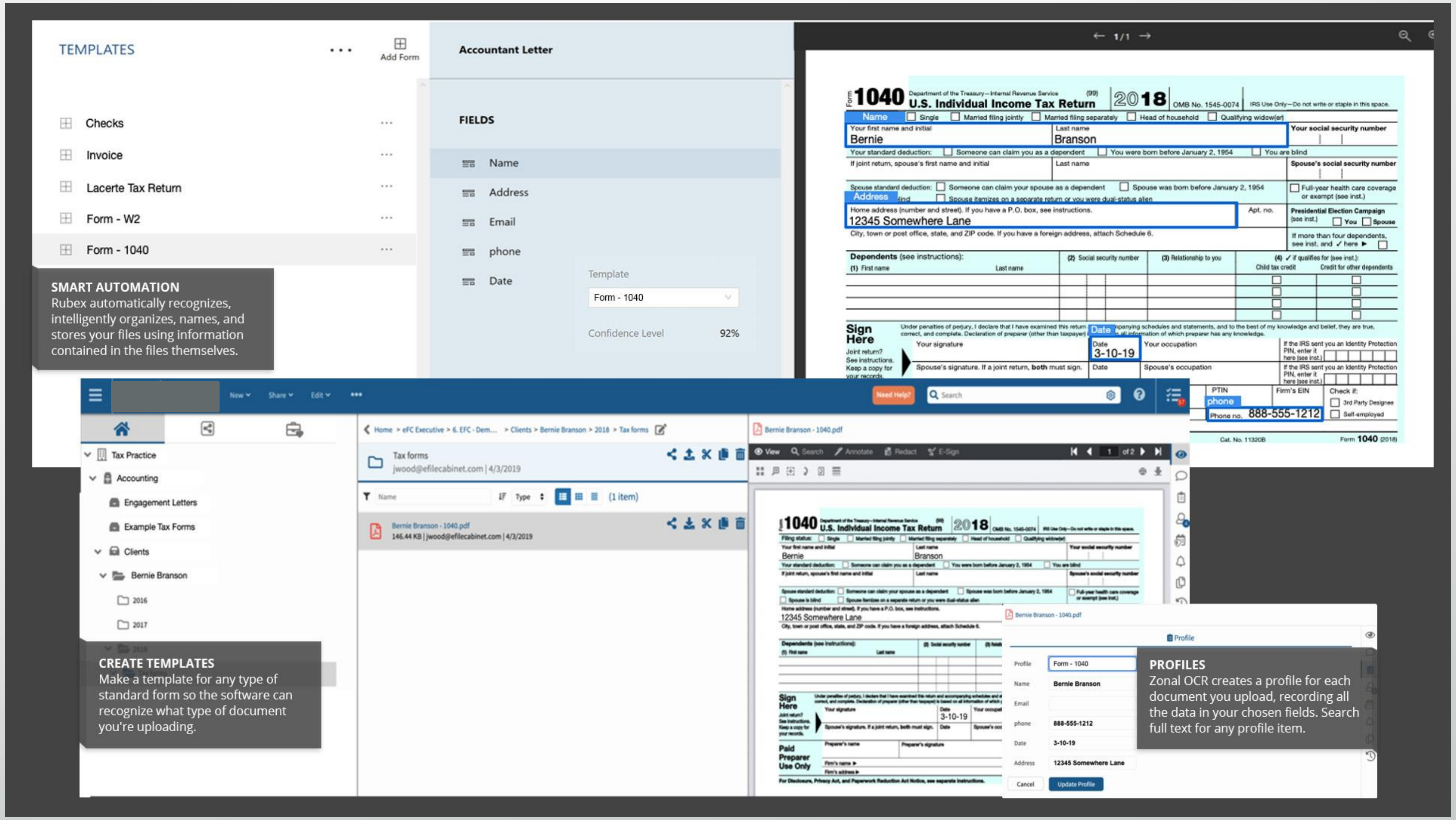
With military encryption, governance and permission tools, your documents have never been more secure

DocMan Features

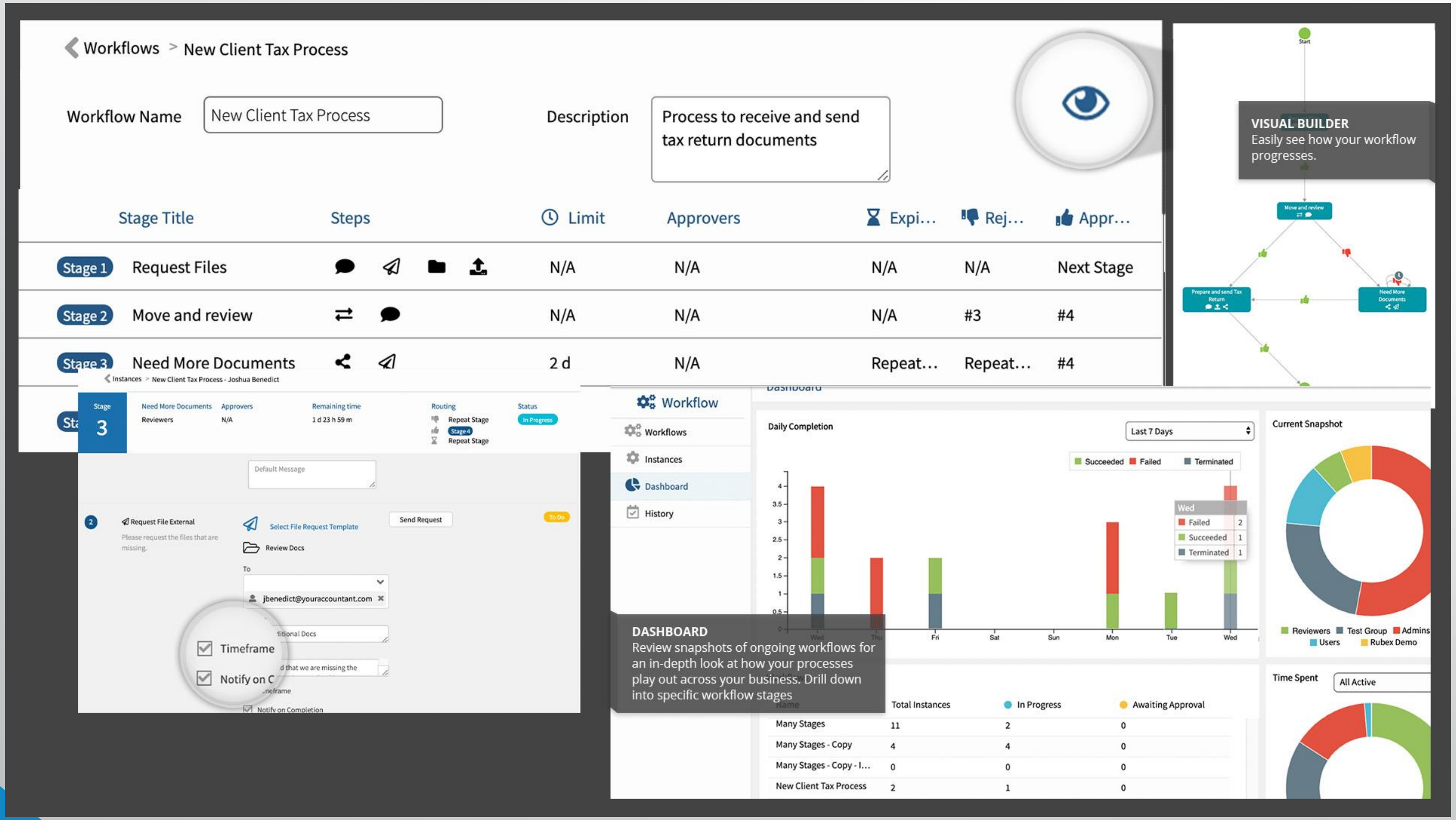
- Smart Automation
- Workflow
- Secure Sharing
- File Request
- eSignature with KBA/OTP
- Dual Screen Previewing
- Faster Searching
- Advanced Version Control
- Form Creation
- Email Imports
- Access Links & Instant Sign-in
- File Search/Retrieval
- Desktop/Mobile App
- OCR
- Enhanced Security

SMART AUTOMATION

DocMan automatically recognizes, intelligently organizes, names, and stores your files using information contained in the files themselves.



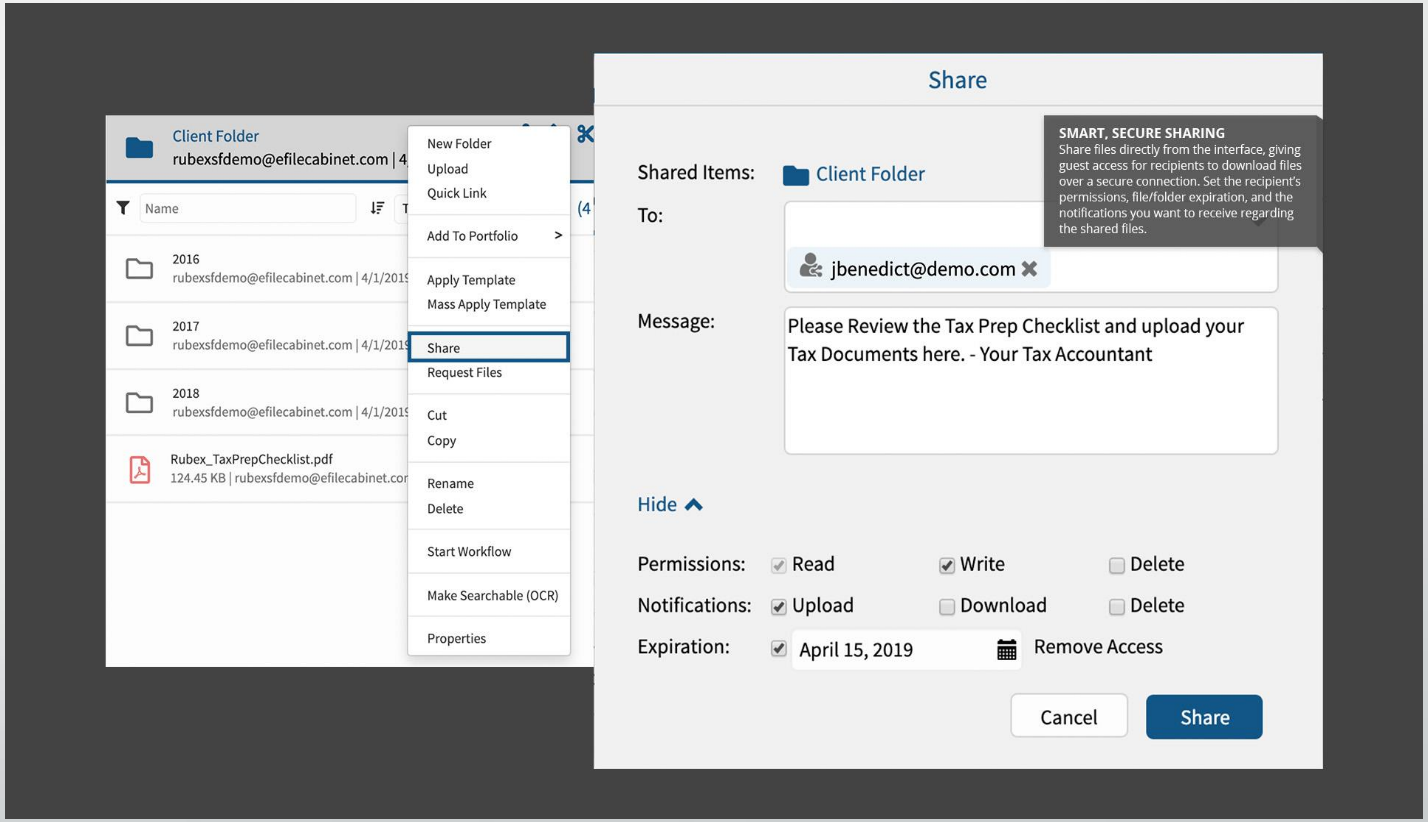
WORKFLOW



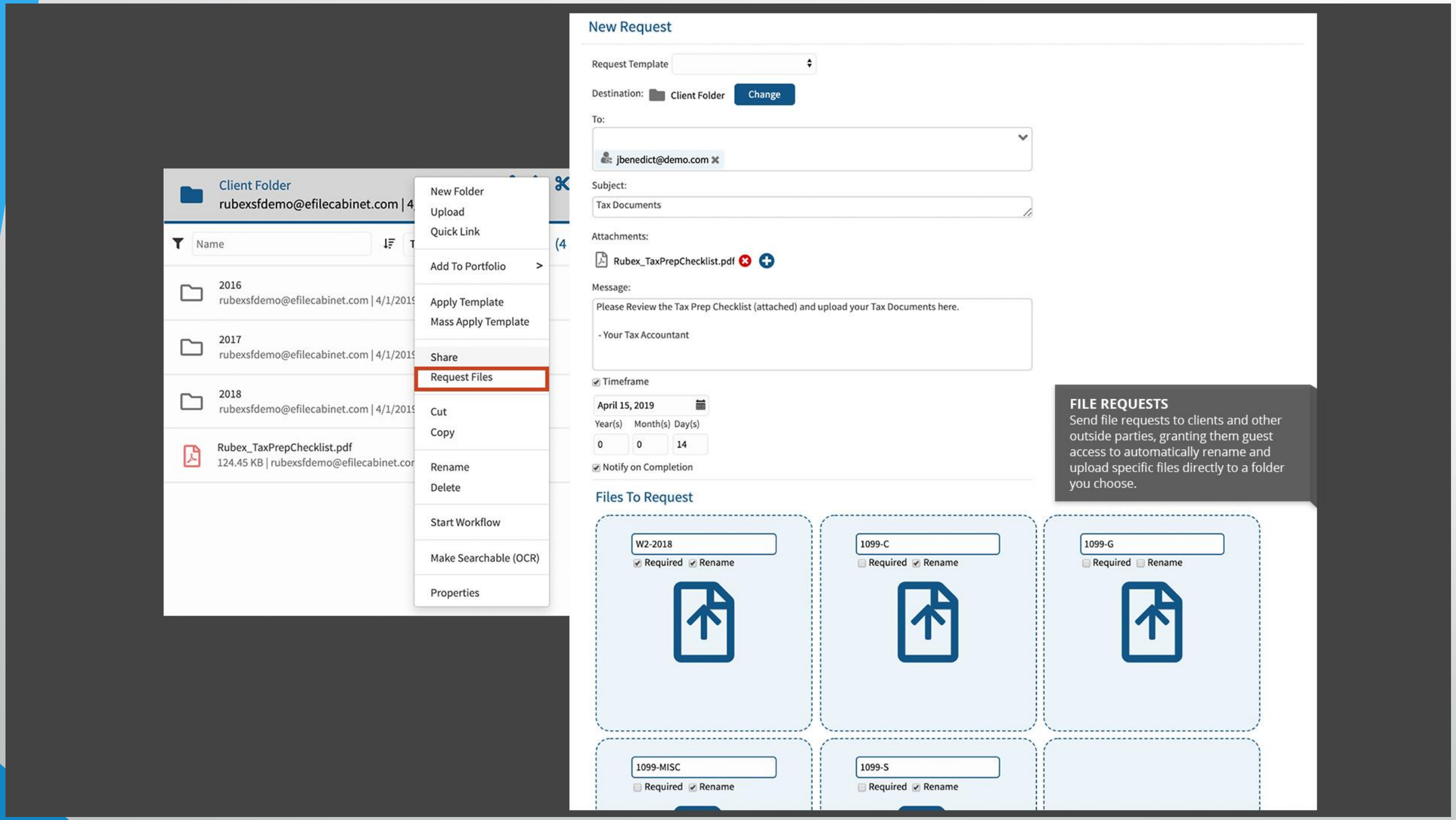
Review snapshots of ongoing workflows for an in-depth look at how your processes play out across your business. Drill down into specific workflow stages.

SHARE

Share files directly from the interface, giving guest access for recipients to download files over a secure connection. Set the recipient's permissions, file/folder expiration, and the notifications you want to receive regarding the shared files.



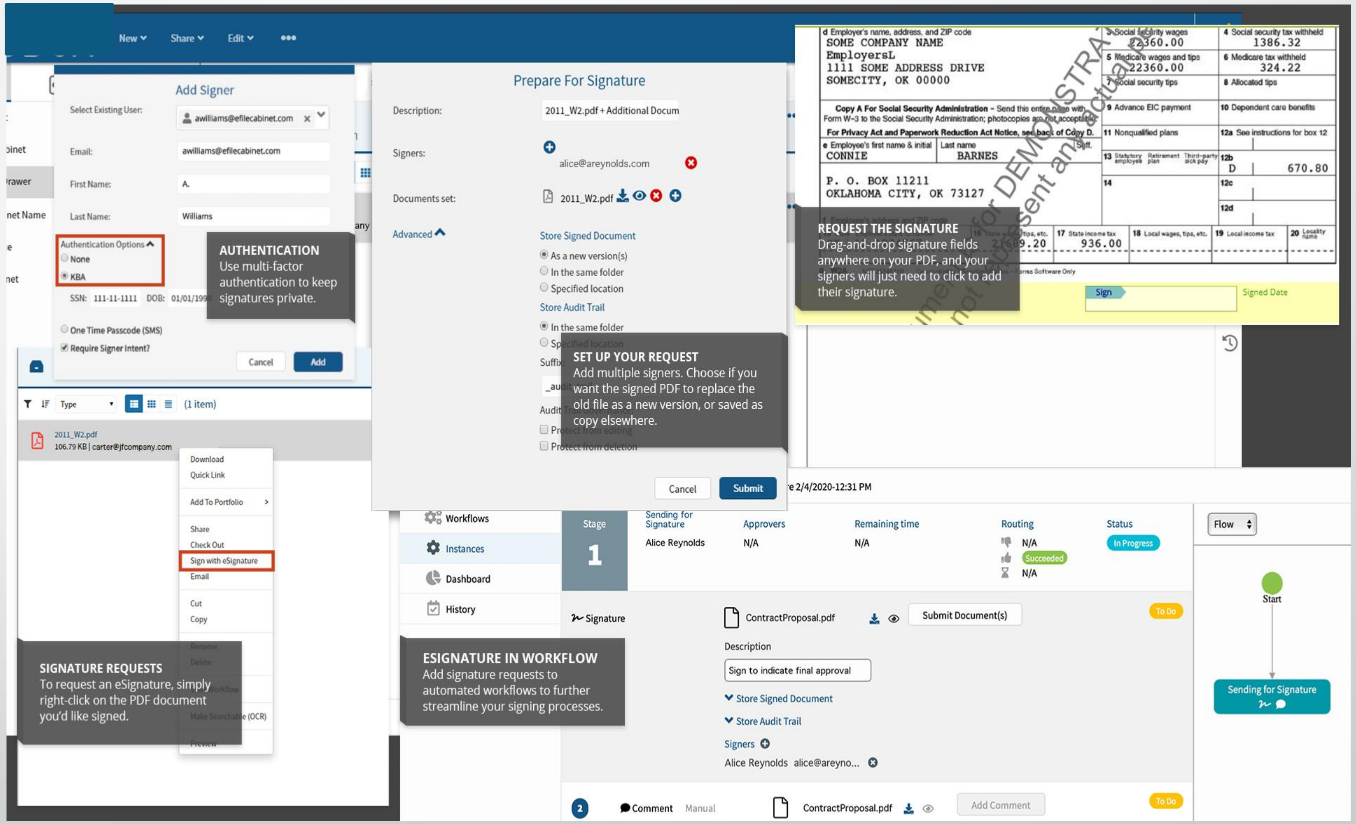
FILE REQUEST



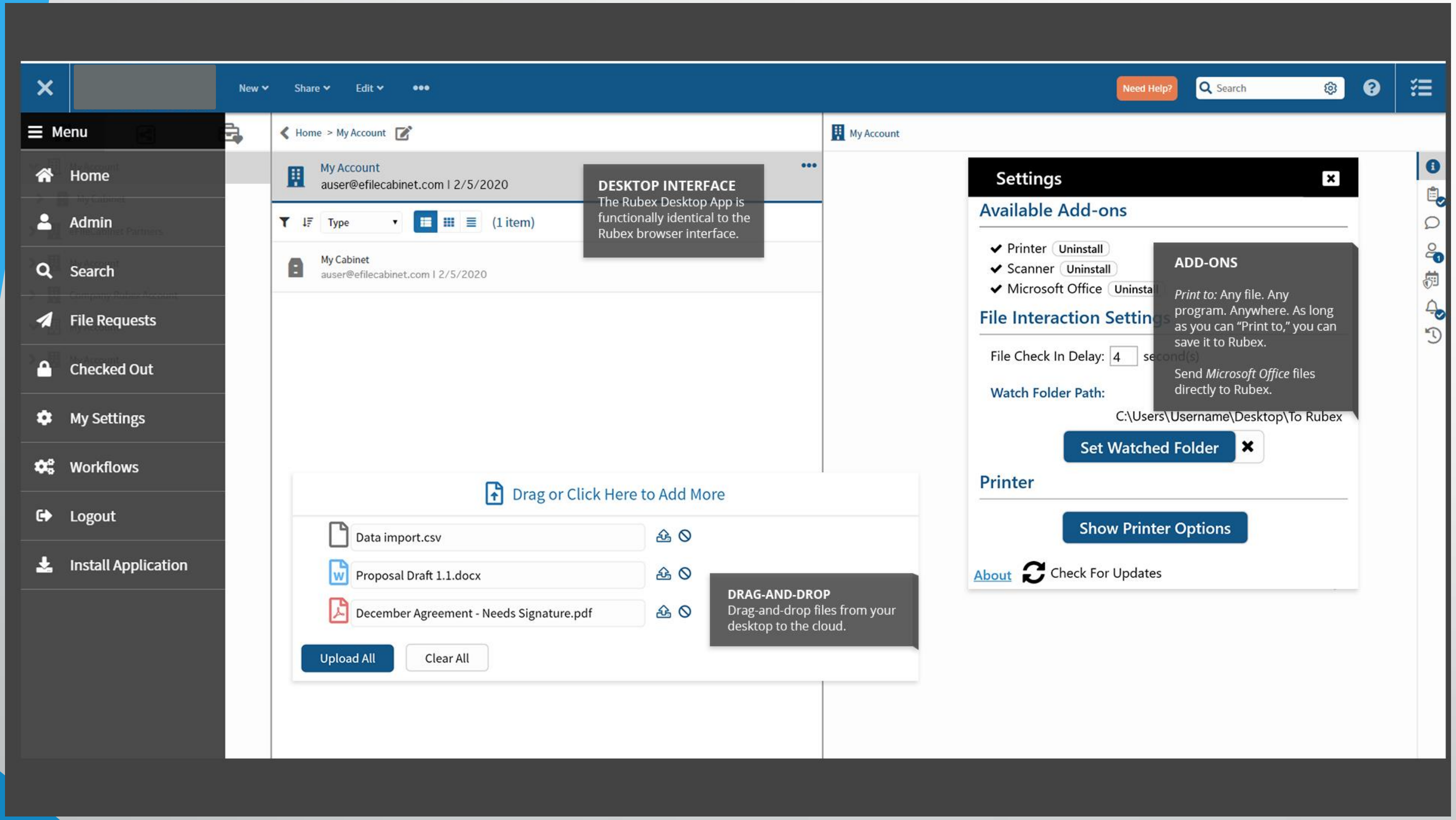
Send file requests to clients and other outside parties, granting them guest access to automatically rename and upload specific files directly to a folder you choose.

eSIGNATURE WITH KBA/OTP

Send secure signature requests to anyone for any document. Save and secure your signed documents anywhere in your system along with a separate audit trail document, making it one of the safe and compliant forms of electronic signature. Secure signature transactions with Knowledge-based Authentication (KBA) or One Time Passcodes (OTP).



DESKTOP/MOBILE APPLICATION

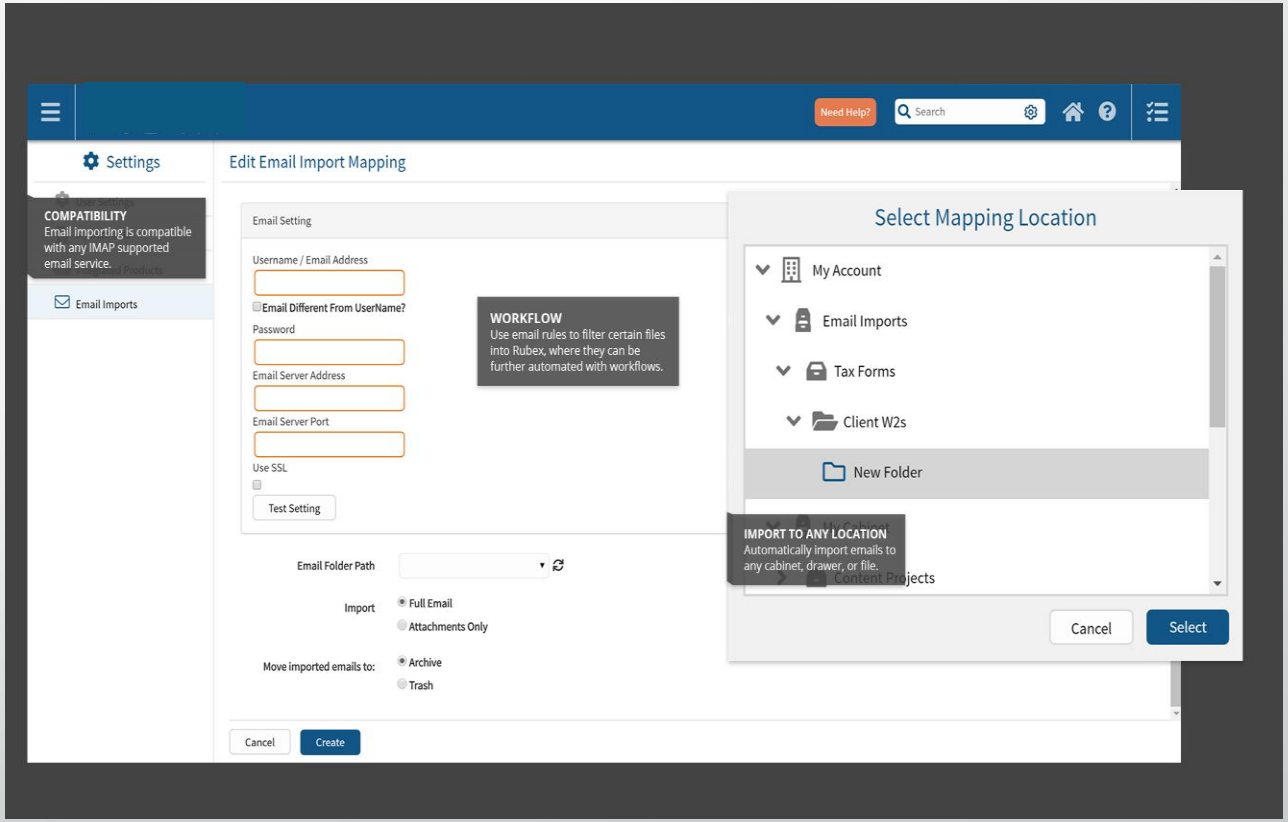


DocMan is accessible from both your web browser and a unique desktop application, so you can control your document management the way you prefer. Our Mobile App makes it easy to access files from anywhere, making work seamless and easy.

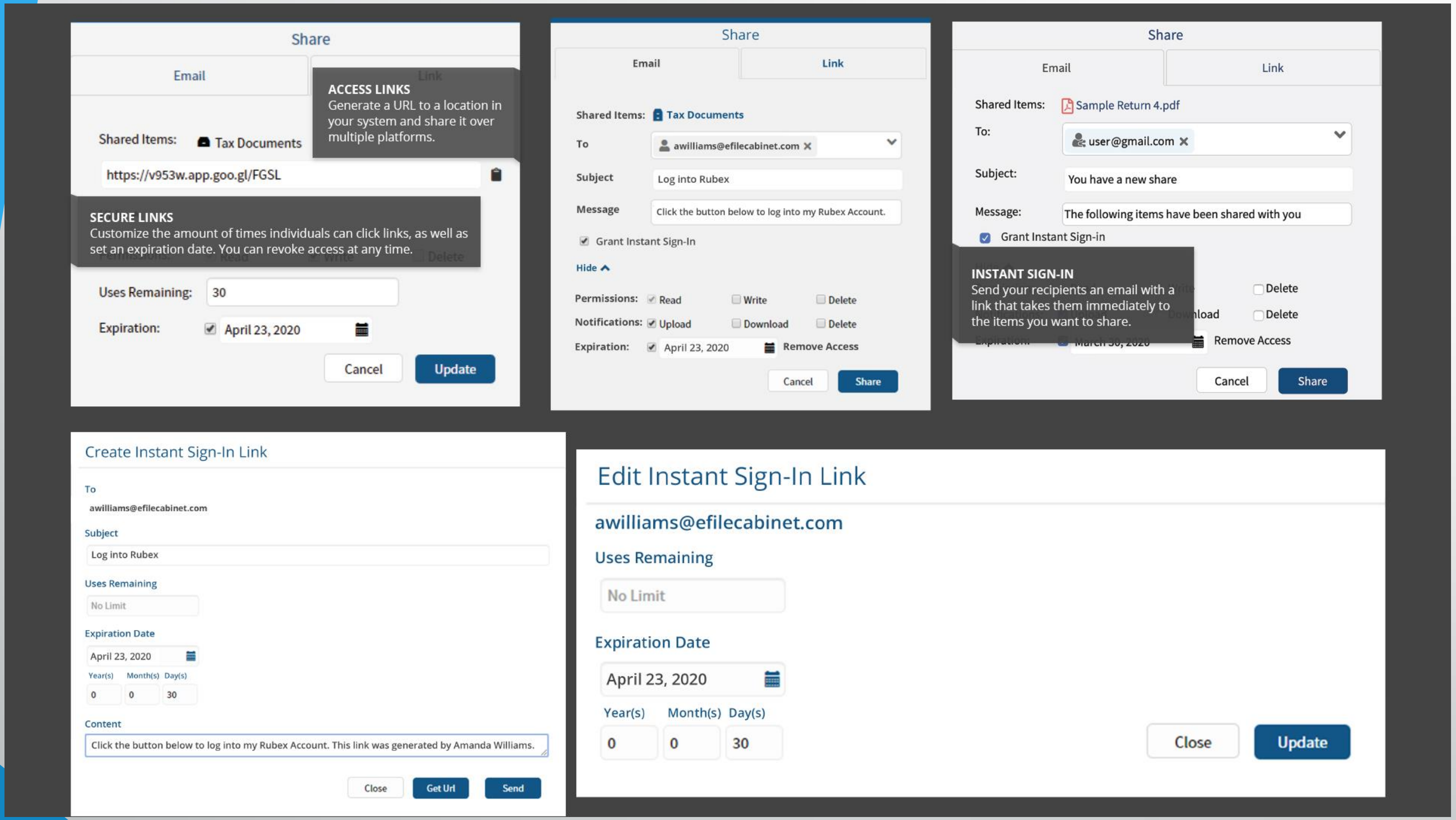
EMAIL IMPORTS

Map a location in your DocMan account to automatically import email messages and/or attachments from your email account inbox or the folder of your choosing.

DocMan also integrates with Google Drive and Microsoft OneDrive, to transfer files directly to your system.



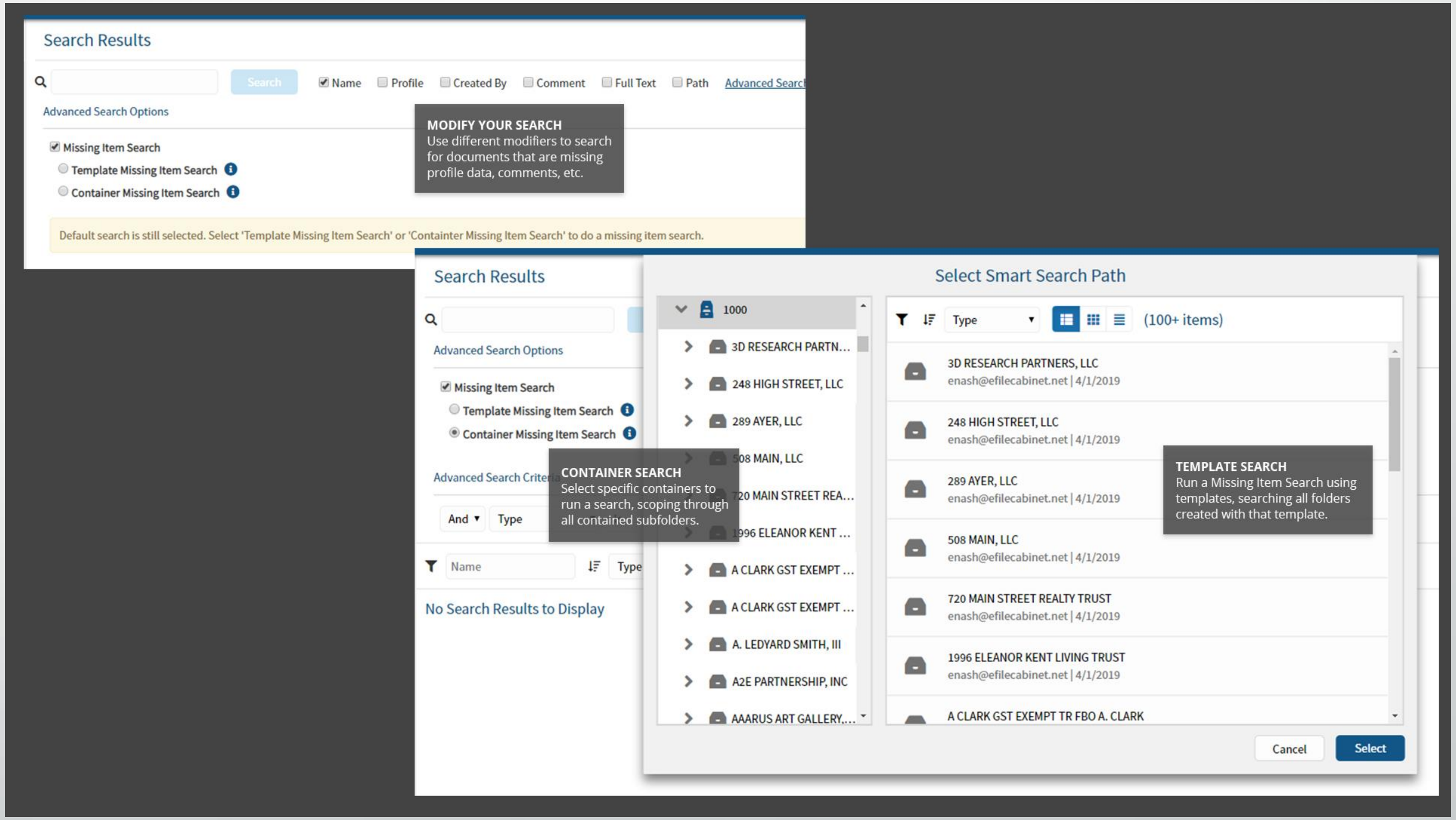
ACCESS LINKS/INSTANT SIGN-IN



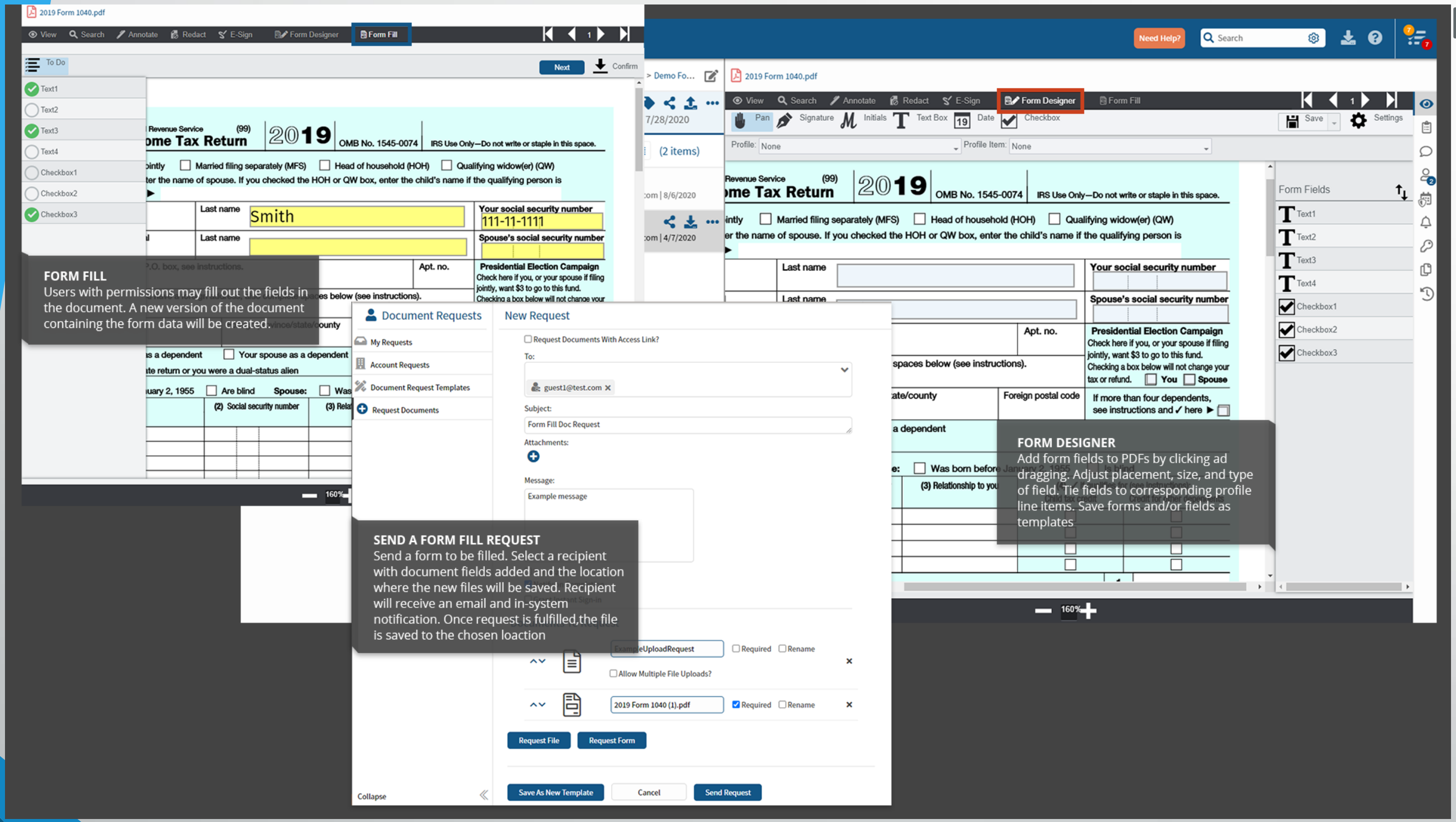
When you need to give faster and easier access to clients or coworkers, create direct links that will give them immediate access to files and folders. Either send a link directly to their email, or generate a URL to share over other text or instant messengers.

FILE SEARCH/RETRIEVAL

Easily check multiple folders or drawers for items that should be in them. Using your templates for your most common folder types, run a search on which folders are missing the searched item.



FORM CREATION



Design and create your own fillable forms with your PDFs, directly from DocMan. Send to clients and colleagues to fill, and you collect the information. No more manual data entry, and even better, use that data to automate the routing of documents for efficiency and compliance.

HERO PROGRAM

SALES PROCESS

AGREEMENT SIGNED

Implementation

- Welcome/Introduction call
- Goal/expectation alignment
- User setup
- Initial training
- Upload documents/Import data
- Sidekick installation
- Zonal installation and setup
- Initial workflow creation
- Template creation

Optimization

- Review current status
- Resolve usage concerns
- Discuss document (desired) flows
- Create, test, review, and go-live for workflows
- Additional user training
- Multiple touch points along the journey
- Additional use-case optimization of eFileCabinet

Support

- 1:30 phone response time / :10 chat response time
- Email/Phone/Chat support
- Ongoing training
- All system updates
- Release notes
- User guides
- Training videos online
- WalkMe-In software guide

Account Executive

Customer Success Manager

Support

365 Days of Success

CONTACT DETAILS

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