



Document Manager

A powerful, integrated electronic filing system

DOCUMENT MANAGER ENABLES YOU TO EASILY STORE AND RETRIEVE FILES SO YOUR PRACTICE IS *LESS PAPER DEPENDENT*.

Overview

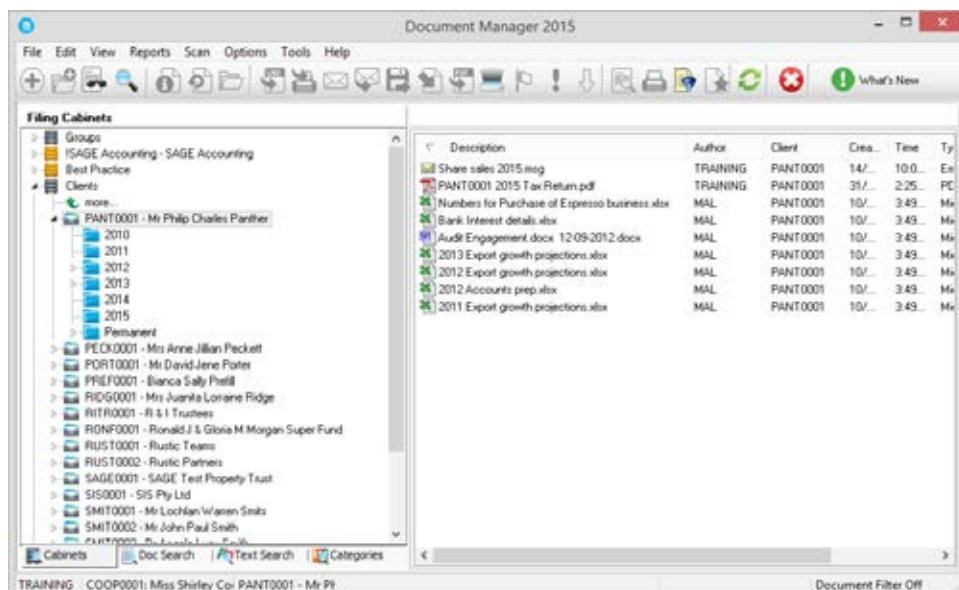
HandiSoft Document Manager is an easy-to-use and yet extremely powerful way to keep on top of the document mountain.

By linking documents to client records and including powerful search tools, Document Manager makes it easy to find any electronic document within seconds. No more wasted time for you or your clients – staff can respond to enquiries quickly and accurately with instant access to all client correspondence.

Key features and benefits

- Document Manager's intuitive "filing cabinet" interface is easy to use and fully integrated with all your existing HandiSoft products

- Use Security to allow or restrict access and protect sensitive files
- Maintains a record of who has made changes and when for version control
- More reliable and comprehensive backups, with all documents stored centrally
- Easy-to-use bulk email facility to communicate with selected clients, quickly.
- Enhanced mail merging include data from multiple HandiSoft modules
- Search metadata (keyword properties/attributes e.g. date, author, client, document type etc.)



Document Manager creates a drawer for each entry



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Manage documents and emails efficiently

Automatically file scanned documents to the relevant client's folder, based on the ABN, TFN or client reference code. Tight integration with MS Office allows users to click within Word, Excel and Outlook to save documents, worksheets, emails and attachments to a specified folder.

PDF collating feature

Combine multiple HandiSoft reports in a single PDF to attach to emails.

Categories

Allocate documents to a predefined category to reduce the need for multiple folders and speed up retrieval.

Version Control

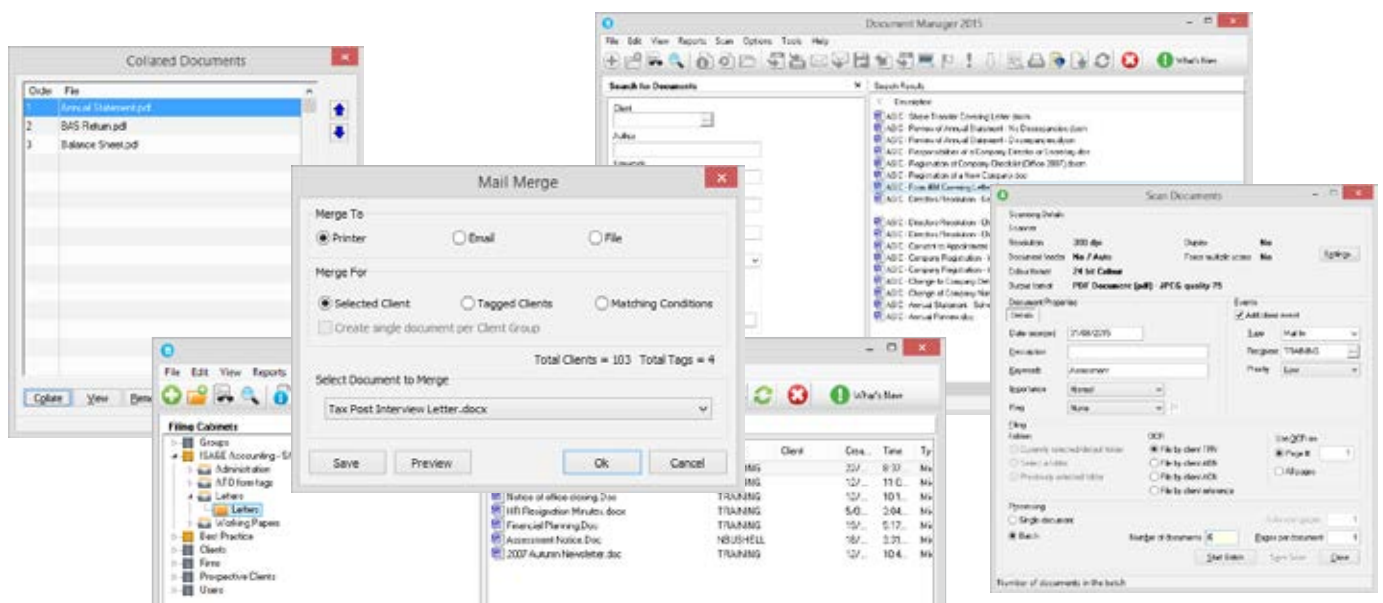
Assign documents for editing, track changes and restrict permanent deletion to authorised team members.

State-of-the-art search technologies

Rapid searching of all types of documents, e.g. Microsoft Word documents, spreadsheets, PDFs, scanned images, emails.

A powerful data resource at your fingertips

Based on the central HandiSoft database, Document Manager creates a drawer for each of your clients and prospective clients. Instantly access all documents relating to a particular client as well as your firm's standard letters, procedures and checklists.



ABOUT SAGE

Sage Australia, is a subsidiary of The Sage Group plc and has offices throughout Australia and New Zealand, and more than 25 years' experience in both local markets.

We provide small and medium sized organisations, and mid-market companies with a range of easy-to-use, secure and efficient business management software and services – from small business online accounting (Sage One), accounting practice management (Sage HandiSoft), payroll and HR (Sage MicrOpay), to enterprise resource planning and customer relationship management (Sage Business Solutions).

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience and technology to inspire our customers to fulfil their dreams.

We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.