

# iPortalDoc

## Document and Process Management

Connecting People to their **Documents**, **Processes** and **Communications**

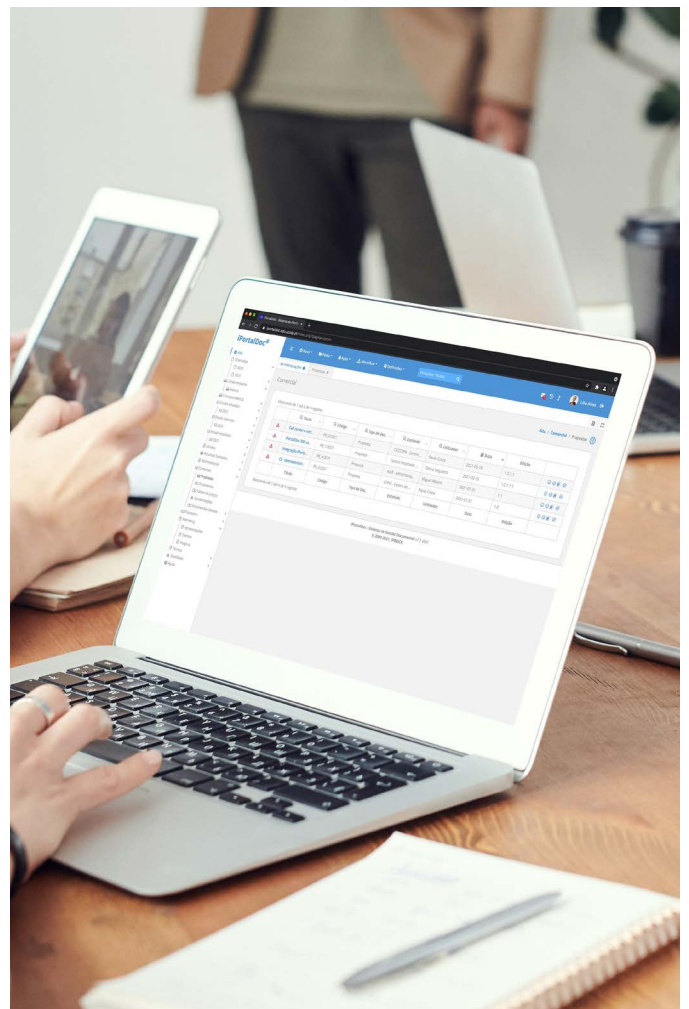
### Digital transformation

The circulation of external or internal documents, as well as the processing of information, is time consuming and subject to various errors. Most of the time, these errors result in the loss of the documents, and therefore in the processes's inefficiency.

The implementation of a Document and Process Management system, iPortalDoc, will eliminate these difficulties and bring enormous advantages for companies.

It allows to insert documents, or trigger workflows by sending an e-mail, associate documents with each other or emails, forward one or more documents simultaneously, with and without pending action, link documents in different folders or consult associated documents. Companies that invest in a Document and Process Management solution achieve a return on investment very quickly, not only by reducing the amount of paper used but also by productivity gains resulting from greater efficiency in the management of processes.

iPortalDoc app is available for ios and Android.



## Processos base



### Correspondence

Received  
Sent



### Legal

Business Contracts  
Legislation



### Management

Announcements



### Email Archive

Internal Emails  
Sent emails  
Emails Received



### Technician

Reporting



### Commercial

Budgets  
Proposals  
Pricing tables  
Customer orders



### Marketing

Presentations  
Events  
Images



### Financial

Supplier Orders  
Supplier Invoices  
Invoices Issued



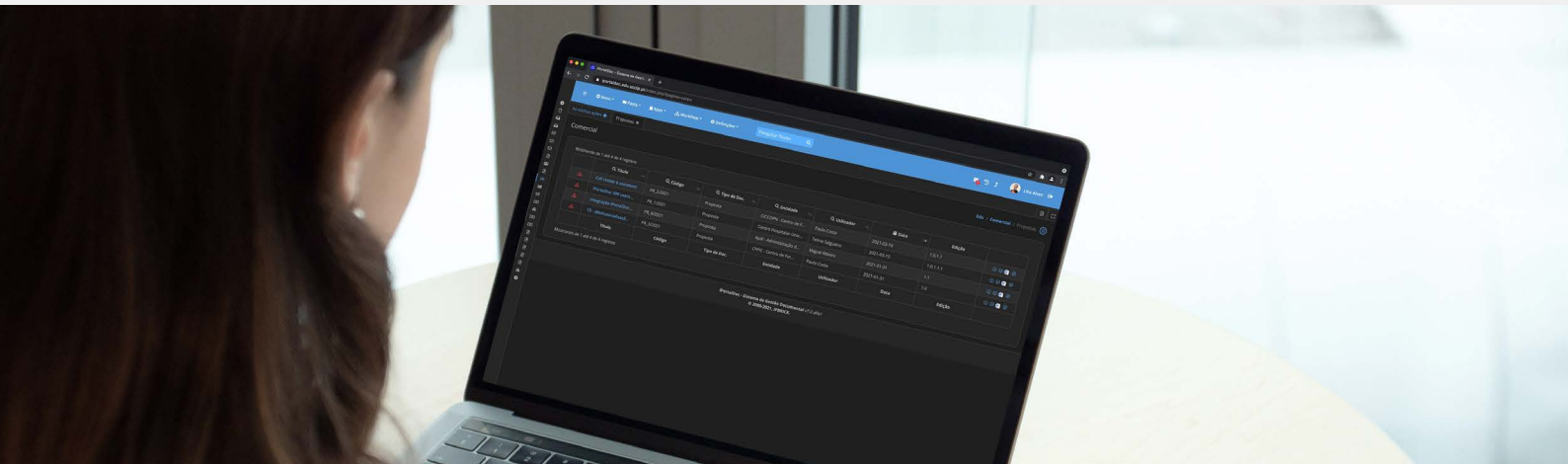
### Human Resources

Vacation  
Expenses  
Absences  
Contracts



### Quality

Audits  
Occurrence  
Claims  
Customer and  
employee evaluation  
Formation



## Functionalities

- Application logs
- Document scanning
- Classification of documents
- Editions management
- Standardization of documents
- Forms
- Email registration
- Process management with workflows
- Types of research
- Entity management
- Integration with OCR
- Qualified Digital Signature
- iPortalDoc Reporting
- iPortalDoc Mobile
- iPortalDoc Light
- Dark mode and Light mode
- Browsability by tab
- Permissions by Group
- Pending Actions and Research
- Integration with Weboffice
- Association of e-mails to documents / processes
- Association of documents
- Forwarding of documents
- Link documents
- Introduction of documents
- Digital Archive
- Integrated CRM

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