

Introduction

Record details of documents such as Wills, Titles and Powers of Attorney, with review dates and electronic versions. Intelligent Document Storage provides a comprehensive system for keeping track of all documents held on behalf of clients. The Intelligent Document Storage links to all other modules within Intelligent Accounts and effectively forms part of the Client Database.

Key Features

Intelligent Document Storage includes the following key features:

- Document indexing providing a comprehensive record of all Wills, Powers of Attorney, Titles, Insurance Policies Equities, Securities, Archived Files or any other important document held for Clients or the Firm.
- Stores any electronic document / file type from any location on the network.
- Retrieves electronic documents in native format..
- Opens electronic documents using their associated applications.
- Easy navigation to find accounts and documents.
- Powerful advanced searching features.
- Save and retrieve advanced searches.
- Favourites list of accounts and documents.
- Unlimited accounts and documents.
- Hierarchical document locations tree.
- Hierarchical document categories tree.
- Embedded Corporate images.
- Microsoft Outlook look and feel.

For further information about Intelligent Document Storage and other products and services available from DENOVO Business Intelligence, please do not hesitate to contact us and we will endeavour to respond to your enquiry as soon as possible.