izidocs

DMS Flows CRM

Nicosia Bar Association

Special Offer for Members

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Contents

1. Executive summary

izidocs DMS Flows CRM is a fully integrated productivity solution that includes:
- Document Management
- Workflow Management
- Customer Relationship Management

izidocs Document Management Solution helps companies to manage and protect scanned documents, email and all other electronic document formats.

izidocs Flows helps companies to manage their workflows. Users can easily create, assign and monitor tasks to completion.

izidocs CRM helps companies to manage their contacts, including court cases, companies under management, directors, secretaries, lawyers, leads, prospects, clients, client officers, suppliers, etc.,

2. Main features

izidocs Document Management Solution

1. **Paper import:** Compatible with all network scanners. Automatic import from scanner and automatic barcode and OCR *(optional)* processing.

2. **Editing/versions:** Editing of all electronic documents *(Word, Excel, etc.)* directly from the browser using native applications installed on PC. All changes to documents are automatically tracked and saved as new document versions. Easy view and access to all previous versions.

3. **Templates:** Document creation from templates. Automatic merging of data such as client name and address during document creation. Addition of barcode allows automated scanning and filing of a signed document as a version of the original word document.

4. **Email:** Outlook integration (drag and drop) to file emails directly from Outlook. Automatic archiving to client folders by using a unique client code in the email's subject, or the email addresses included in the email. This auto filing functionality minimises time spent on archiving emails to company folders. Easy access of all emails sent/received by any email address for CRM purposes.

5. **Search:** Intelligent, simple keyword search, across all document properties. Detailed search using from, to, subject, filename, folder *(combinations)*, text in document has/does not have word(s), has attachment *(for email)*, date(s), size, number of pages, file type, creator, last editor.

6. **Compliance:** Keeps a permanent copy of all email and documents. Email is stored independently of user actions *(e.g. delete)* in Outlook. All user actions on documents are recorded. All documents are recoverable even if they are deleted.

7. **Integration:** Integration with other solutions, e.g. Active Directory, banking, ERP, CRM, legal, company administration, etc. *(optional)*

8. **Client folder structure:** automatic creation of client or case subfolders such as Agreements, Compliance - KYC, Statements, etc., with appropriate access rights for the various user groups *(optional)*

9. **PDF tools:** Extract pages, remove pages, split document, merge multiple documents to single pdf, convert to B/W, add/replace pages, without the cost of purchasing additional software.

10. **Protect:** Granular security policies with separate create, edit, view, move, delete rights per folder/subfolder. Access rights based on user location can also be defined. Recording of all user actions, encryption of documents in transit, and at rest with multiple keys *(optional)*.

11. **Mobile interface:** search and view folders and documents. Download documents.

12. **Share documents:** share with outside collaborators, including secure exchange of documents

izidocs Flows

13. **Simple setup**

14. **Create and assign tasks** for others with priority and due date

15. **Monitor the status of all tasks** you created for others

16. **View and act on all tasks assigned to you**

17. Related **information and documents accessible directly from task**

18. Possibility to set up **formal workflows**

izidocs CRM

19. **Simple to use**

20. **Manage all types of contacts**, depending on your business, e.g.
    a.   Court case
    b.   Company under management
    c.   Sales lead
    d.   Prospect
    e.   Client
    f.   Supplier

21. **Access rights defined per contact**

3. Services

1. Installation, configuration and training
   a. Install the Solution
   b. Set up user groups and users, and define access rights
   c. Configure the solution according to client's needs
   d. Provide up to 6 hours of training to users

2. Support
   a. Response to the client's support requests through telephone, email or remote access, during the client's normal days and hours of business operation within 1 hour of such request. Such support shall include consultation on the operation and utilization of the solution

3. Optional
   a. Integration with client's other solutions, e.g law office management, company management, etc.
   b. Integration with client's email server to import all emails
   c. Upload existing documents from file server

4. Timeline

Activity	Week
Installation and setup	1-2
Integration	2-4
Training	4
Solution goes live	5

5. Fees

1. **Software as a Service (SaaS)**

   a. Initial services fees
      i. Installation, configuration and training: ~~EUR 2,000~~, discounted to EUR 1,000, payable in advance
      ii. Optional: integration and upload services will be quoted separately

   b. License, hosting with backups (EU cloud, currently Oracle), maintenance and unlimited remote support fee, payable annually in advance

Item	EUR	
Users 1 - 20	~~235~~. 175	per user, per year, based on the average number of users in the year
Users 21 - 50	~~155~~. 95	
Users 51 - 100	~~135~~. 75	
Users 101 -	~~105~~. 45	
Storage	1.50	per GB, per year, based on the average number of GBs in the year

   c. Optional disaster recovery (2nd EU cloud, currently Google)

Item	EUR	
Users	5.00	per user, per year, based on the average number of users in the year
Storage	0.75	per GB, per year, based on the average number of GBs in the year

   d. Minimum number of users: 5

   e. Disclaimer: if the cost of the clouds we use to provide these services changes significantly, the above prices will be adjusted accordingly

2. Money back guarantee, if during acceptance testing the solution does not perform according to specifications
3. VAT is not included in the above prices and will be added at the time of invoicing
4. Invoices are payable at the time of issuing
5. This proposal is valid until 31/12/2022

Appendix A: Functionality

izidocs Document Management Solution

1. General
    a. Interface: Browser based, supports all latest browser versions, including tablets
    b. Mobile interface to search and view folders and documents. Download documents
    c. Customisable: User settings remembered across devices
    d. Filters: Drop down filters enable easy field completion, e.g. folder/subfolder discovery for filing

2. Capture
    a. Folders: One action uploading of entire folder/subfolder/file structures
    b. Electronic files: Easy (drag and drop) uploading of all types of files including MS Office, OpenOffice, PDF, text, image, audio, video, archive
    c. Email: Outlook integration to file (drag and drop) emails directly from Outlook. Capture and retain all emails *(optional or mandatory folder allocation)*. Auto file functionality minimises folder allocation effort
    d. Paper: Compatible with all network scanners, automatic import from scanner, multiple users per scanner
    e. Recognition: Empty page, barcode, and optional Optical Character Recognition *(OCR)* for scanned document and fax separation, processing and indexing. OCR cost is not included in this proposal
    f. Indexing: Indexes text in all electronic files, including MS Office, OpenOffice, PDF, text, emails *(including attachments)*

3. Manage
    a. File: Easy document filing using searchable folder filters. Multiple folders per document. Option to impose filing discipline by specifying minimum acceptable folder/subfolder levels
    b. Document data: Automatically adds known document data such as email from, to, date and subject. Allows user to add/edit document data such as from, to, date, keywords, description, notes. Custom data fields
    c. Editing/Versioning: Editing of documents directly from browser. All changes to documents automatically tracked and saved. Users can upload additional document versions, even of different file type. Easy view and access to all previous versions
    d. Templates: Document creation from templates. Addition of barcode for scanning / processing automation
    e. PDF tools: Extract pages, remove pages, split document, merge multiple documents to single pdf, convert to B/W, add/replace pages, without the cost of purchasing additional software
    f. Search: Intelligent, simple keyword search, across all document properties. Detailed search using from, to, subject, file name, folder *(combinations)*, text in document has/does not have word(s), has attachment *(for email)*, date(s), size, number of pages, file type, creator, last editor, custom data fields

g. Intranet/portal: Small groups of users can administer content that is made available to large groups of viewers. Custom made portal to display specific documents and information can be created at an additional cost

4. Retain
   a. Protect: Granular security policies with separate create, edit, view, move, delete rights per folder/subfolder
   b. Destroy: Different retention policies can be implemented in accordance with client legal requirements
   c. Compliance: Keeps a permanent copy of all email sent/received and all documents uploaded. Records all user actions
   d. Encrypt: encrypts all documents in transit, and at rest with multiple keys *(optional)*
   e. Disaster recovery: mirror remote site *(optional)*

5. Integration
   a. WebDAV
   b. CMIS 1.0 (Content Management Interoperability Services)
   c. Web services
   d. HTTP calls
   e. Izidocs API, which can be used to upload documents, view documents, open specific folders, etc.

izidocs Flows

6. Simple setup

7. Flexibility and ease of use
   a. Create and assign tasks for others with priority and due date
   b. Monitor the status of all tasks you created for others
   c. View and act on all tasks assigned to you
   d. Related information and documents accessible directly from task

8. Secretariat
   a. Log incoming and outgoing correspondence
   b. Log intra organisation correspondence
   c. Manager assigns correspondence to appropriate user with directions and deadline as task, and monitors progress
   d. Users can assign the task to others
   e. All users can enter notes
      i. Permanently recorded for compliance.
      ii. Text can be
         1. predefined such as "approved", "denied", "forward for payment"
         2. free
   f. Users get email alerts and reminders for outstanding tasks they have
   g. Users can monitor the progress of all tasks they have assigned to others
   h. Search functionality on all tasks

9. Possibility to set up formal workflows (optional, requires development fee)

      a. Specific types of tasks/documents follow predefined routes with approvals
      b. User groups with different approval rights

izidocs CRM

Subject to change, currently under development and testing

10. Manage contacts
      a. Records all necessary contact information
      b. Produces appropriate reports

11. Contact information
      a. Type specific details
         i. Individual
            1. Name
               a. First Name
               b. Surname
            2. Date of birth
            3. ID (multiple)
               a. Type
               b. Number
               c. Country of issue
               d. Date of issue
               e. Date of expiry
         ii. Legal entity
            1. Name
            2. Registration number
            3. Country of registration
            4. Date of registration
            5. Tax number
            6. VAT number
      b. General details
         i. Telephone (multiple)
         ii. Email (multiple)
         iii. Address (multiple)
      c. Notes
      d. Category (customisable)
         i. Court case
         ii. Company under management
         iii. Sales lead
         iv. Prospect
         v. Client
         vi. Supplier
      e. Contact's officers (customisable, links to other contacts)
         i. Decision maker
         ii. UBO
         iii. Director
         iv. Secretary
         v. Counterparty lawyer
         vi. Accounting

       vii.   Technical

      viii.   Director

       ix.   Secretary

        x.   CEO

f. Our officers (customisable, links to solution's users)

        i.   Partner

       ii.   Manager

      iii.   Lawyer

      iv.   Sales manager

       v.   Sales person

g. Attachments (upload/DMS/link)

h. Flows (link to izidocs Flows)

        i.   Start new workflow

       ii.   View all workflows

i. DMS (link to DMS)

        i.   Automatic creation of contact's folders and subfolders

       ii.   View contact's folders and subfolders

j. Activities

        i.   User

       ii.   Date

      iii.   Time

      iv.   Notes

       v.   Attachments

      vi.   Access (links to solution's users)

      vii.   Type (customisable)

            1. Phone call

            2. Email

            3. Meeting

            4. Chat

            5. SMS

            6. Events

                 a. Name

                 b. Description

                 c. Type

                 d. Date

                      i.   Single

                     ii.   Multiple

                   iii.   Repeated

                 e. Status

                      i.   Empty

                     ii.   Started

                   iii.   Completed

k. Reminders

l. Billing (time and expenses)

m. Opportunities

        i.   Name

       ii.   Status (customisable)

            1. New

            2. Qualified

            3. Meeting

            4. Proposal

                5.   Won/lost
- iii.   Source
- iv.   Scope (products / services to be sold)
- v.   Size (monetary terms)
- vi.   Probability to win
- vii.   Expected revenue
- viii.   Notes
- ix.   Attachments

12. Search
    a. Search contacts using multiple criteria

13. Reports
    a. View/export all events associated with a user combined
    b. View/export all contacts associated with a user combined
    c. View/export all contacts of certain type and category

14. Access rights
    a. Defined per contact