

# 10 Game-changing digital tools you need for true efficiency

Save time and get more done like these 15,000 professionals

With the right automation tools in place, you can save countless hours by not having to dig through papers and disconnected applications for information anymore. You can focus your newly saved time on growth-oriented work that addresses your company's goals.

You might be thinking: "We already use a file share solution or a basic document module in my ERP... why would we need a document management (DM) solution?" or "I'm used to working this way. Why should I change now?"

## Don't fall behind your competition!

Based on feedback from 15,000 document management users from 100+ countries, here are the top 10 benefits that you gain when you go all in on using a document management workflow software.

### 1 Automated document capture and archiving

You don't need to manually scan paper and upload it to a file share anymore; that's wasting time. Instead, a DM solution can monitor a folder or inbox and automatically index and store emails and any documents to where you need it.

### 2 Permissioned access

No more losing sleep wondering who can access your documents. Easily control who can view, access, and edit them by user, group or department - make documents only accessible to authorized users.

### 3 Ease of use

Minimal clicking, clean interface, and browser compatible - any user, from a newbie to a seasoned tech expert, can use modern cloud DM. Updates happen automatically, so features and interfaces are continuously being made easier for you to use.

### 4 Workflow automation

After documents are stored, the system can automatically route them to the department or individuals you need in order to kick off an important process, like AP or employee onboarding. There is no limit to what kind of process can be automated!

### 5 Integration

Give your IT team a break and let the DM solution easily talk to all your other solutions for consistent document and data across your entire company. Integration technology has advanced so much that this isn't as hard to accomplish as in the past. Also, there is no need to maintain hardware as all cloud solution updates are done automatically.

### 6 Email management

If you have a team working from one inbox, such as customer service, a DM solution makes it seamless for team members to pick up where others left off as emails and documents can be effortlessly stored and retrieved. When a customer calls in, any team member can quickly pull up info as needed.

### 7 Mobile app

Mobile capabilities are no longer a "nice to have." Mobile document management lets users store and access documents, and stay involved in workflows - anytime, anywhere. Employees also receive alerts of new tasks to review and documents to approve. They can collaborate with other staff members in real-time to keep business moving forward.

### 8 Electronic signature

In this day and age, we hope you aren't mailing contracts back and forth. However, if you are, a DM solution with an integrated e-signature feature can make this process faster and more secure. By integrating external signature providers such as Validated ID or DocuSign seamlessly into a workflow, documents are automatically transferred between the DM solution and the Trust Provider. The signer is notified when documents are ready for signing and the completed contracts are safely stored.

### 9 Scalable architecture

Start with a few users in a single department and gradually expand the system into other departments. Maybe you want to try out one document-heavy process first and then slowly add more processes, until eventually you have one whole department using it successfully. From there, you can expand to more departments, gaining even more productivity and efficiency.

### 10 Security

Have peace of mind as the DM solution ensures security through strong user authentication, data transfer using HTTPS, document encryption with 256-bit (U.S. military standard), multi-level access control for documents and settings, tracking actions and redundant data storage to offer robust protection against malware and other attacks.

You won't enjoy these benefits with a run-of-the-mill file share solution or by sticking with paper processes. Let's continue the conversation about how document control software can help you!

**Contact us today for a no-obligation demo; simply reply to the email you received this checklist in or use the contact info located at the bottom of the email.**