

OfficeBase Feature List

ELECTRONIC EMAIL & DOCUMENT MANAGEMENT

PURPOSE

Structured Storage & Retrieval of all Documents are made under several criteria including Client, Company, Project, Matter, Subject and Category

MODULES

	Email	Standard	Professional
Contact Manager (CRM)	Yes	Yes	Yes
Document Manager	Yes	Yes	Yes
Email Management	Yes	Yes	Yes
TASK Manager (Workflow)	Yes	Yes	Yes
Security Module	Yes	Yes	Yes
Integrated Scanning Module	N/A	N/A	Yes
Integrated PDF Converter	N/A	N/A	Yes
Batch Scanning with defined templates for indexing	N/A	N/A	Optional
Integrated module for Publishing documents to WEB site	N/A	N/A	Optional

FEATURES

OfficeBase is integrated with most Microsoft Office Applications	email only	D & D	Integrated
Documents are associated with clients , Projects Matters & or Subjects	Limited	Yes	Yes
Documents are stored in their Native Application	Yes	Yes	Yes
Version Control	NO	Yes	Yes
Dependence on Windows Explorer	NO	NO	NO
Eliminates need for naming Convention	Yes	Yes	Yes
Folders & File Names created automatically	Yes	Yes	Yes
Automatic capture of emails from Outlook- optional	Yes	Yes	Yes
Assists with Corporate Compliance	Yes	Yes	Yes
Quick & Efficient Retrieval of Documents & Emails etc	Yes	Yes	Yes
Staple or Note function	Yes	Yes	Yes
Network Product	Yes	Yes	Yes
SQL Database	Yes	Yes	Yes
Attractive Cost Of Ownership	Yes	Yes	Yes

SECURITY

User security selectively limits access to documents	Optional	Optional	Yes
Security against accidental or Malicious deletion of Documents	Yes	Yes	Yes
Backups has copies of documents that manual systems do not have	Yes	Yes	Yes

BENEFITS

Reduces the Incidence of misplaced documents
 Substantially improves a users productivity
 Eliminates the need to allocate folder and file names
 Eliminates the need for a uniform naming convention
 Allows emails & records to be shared on a network
 Allows records to be created and executed in their native application