

Service Management System



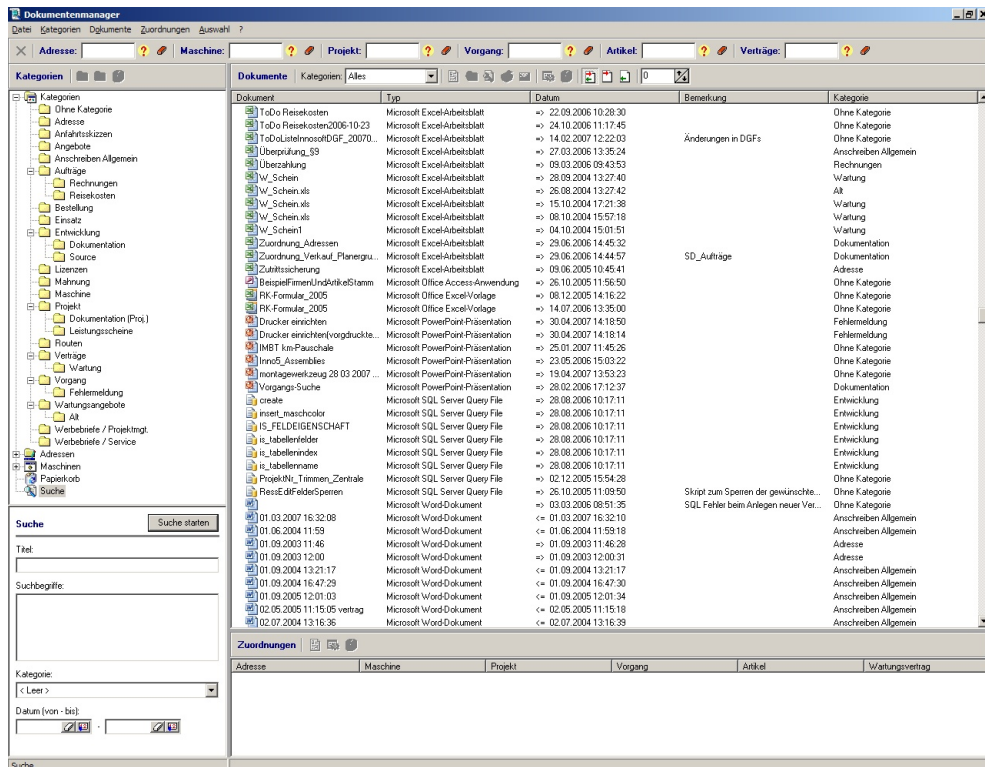
Document Management

Functions

- Management of all incoming and outgoing documents
- Purposeful filing of the documents with allocation, e.g. to customer
- Deposit of search keywords
- Deposit of categories
- Integrated into the INNOSOFT programs
- Support of various document formats (e.g. MS Word, MS Excel, etc.)

Benefits

- Central filing of documents and files
- Selection over diverse filters
- Document creation and filing during the work process
- Quick finding of all documents
- Display of all documents allocated to a customer or a product



Document Management

Documents are a substantial component of business processes; however, the filing and the quick finding of required documents sometimes can be a problem.

The **INNOSOFT Document Management** is a highly efficient tool, with which documents can be stored and provided in the desired form on demand and at short notice. It is of no significance whether documents are involved, which have been created with programs from Innosoft, or files from other directories.

The search for certain documents is not limited to one archive, versatile search functions support the finding of the desired files. There are no complicated inquiry instructions, the search works just as simply as in the other programs of the Service Management System.

In the monitor of the Customer Relationship Management system the documents are displayed in an overview, similar to the explorer, and are allocated – depending on the preselection – to a certain procedure or a machine.

Forms, which have been created in the individual programs, like e.g. quotations, do not have to be assigned separately. A quotation is assigned to a customer and – if available – to the product already in the stage of creation. The user can call up the quotation over the search functions and/or let it be displayed in the monitor of the Customer Relationship Management.

The related documents can be accessed from out of the Innosoft programs via a button. If you are e.g. working on a certain order in the Invoicing module, then you can view the documents belonging to this order at the touch of a button.

The screenshot displays the INNOSOFT Document Management interface. On the left, there is a header for 'INNOSOFT GmbH' with contact information: Semerteichstr. 47-49 • 44141 Dortmund. Below this, the company name 'Innosoft GmbH' and address are repeated. A salutation 'Sehr geehrter Herr Brieger, die Textbausteine funktionieren einwandfrei.' is followed by 'Angebot 4.02'. A table lists the offer details:

Pos.	Menge	Einheit	Beschreibung	Summe [EUR]
1	1,00		Allgemeins Angebot zur Demonstration	10,00
			Dienstleistungen	
	1,00	Tag	Normalstunden	
			Module	
	1,00	St	Der Artikel kann durch den Alternativartikel A23 ersetzt werden. Die Anlage besteht aus dem Antrieb 46 un der zugehörigen Antriebsachse A33 mit integriertem Ausgleichsensor.	

On the right, a 'Dokumentenliste' (Document List) sidebar shows a list of documents, with 'Angebot Nr. 0050021' selected. Other documents include 'Angebot Nr. 0050009', 'Dok1', 'fürh', 'innosoft', 'lfdige', 'MSWord-Dokument (neu)', 'neumünster', 'reimelt unter anderer adresse', and 'Wartungsdokument'.

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