filedoc

Document Management
and Workflow Automation

CONTROL YOUR INFORMATION BEFORE IT CONTROLS YOU!

Filedoc is a document management and process automation platform that enables organisations to centralise information, digitise and optimise processes, and improve operational efficiency.

In a single solution, it brings together document management, email, workflows, electronic forms, electronic signatures and artificial intelligence, making it easier to manage and access information from anywhere and on any device.

Designed for organisations of different sizes and across a wide range of industries, Filedoc ensures information control, security and traceability while simplifying tasks, speeding up decision-making and promoting collaboration across teams and departments.

With over 20 years of experience and more than 1,000 client organisations, Filedoc combines advanced technology, flexibility and ease of use to support digital transformation and the continuous improvement of processes.



BENEFITS FOR YOUR ORGANISATION

Increase productivity and reduce operating costs - Eliminate repetitive tasks, reduce errors and free up resources for higher-value work.

Automate processes and speed up decision-making - Streamline approval workflows, shorten response times and increase process efficiency and transparency.

Turn information into knowledge with artificial intelligence - Automate document processing, make search easier and provide relevant information to support decision-making.

Centralise information and simplify access - Bring documents, emails and processes together in a single repository, ensuring fast access to information and reducing document fragmentation.

Strengthen security and support compliance - Protect information through access controls, traceability, audit trails and mechanisms that help meet legal and regulatory requirements.

Integrate systems and eliminate duplicate work - Connect document management and processes with existing business systems, such as ERP and CRM, ensuring information flows smoothly while avoiding manual data entry and duplication.

Monitor and continuously improve processes - Track performance indicators, identify inefficiencies and drive continuous improvement based on up-to-date information.

WHY CHOOSE FILEDOC?

Implementing a document and process management system is a decisive step for any organisation. It enables information to be managed centrally, based on the following principles:



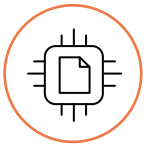
A COMPLETE, INTEGRATED AND MODULAR PLATFORM

Filedoc brings document management, email, process automation, electronic forms, electronic signatures and artificial intelligence together in a single platform. Its modular architecture allows new capabilities and specialised solutions to be added as the organisation's needs evolve, preventing information from becoming fragmented across multiple applications.



ADVANCED WORKFLOWS, NO CODING REQUIRED

Filedoc provides an advanced workflow engine that makes it possible to design, configure and automate processes using visual tools, with no need for custom development. This flexibility gives organisations greater autonomy to adapt their processes, implement changes and respond quickly to new requirements.



ARTIFICIAL INTELLIGENCE INTEGRATED INTO INFORMATION AND PROCESS MANAGEMENT

With Filedoc Vision, artificial intelligence becomes part of the organisation's information and process management. From document classification and data extraction to natural-language search and access to organisational knowledge, AI automates tasks and helps organisations make better use of the information they already hold.



FLEXIBILITY AND SCALABILITY FOR ORGANISATIONS OF ANY SIZE

Filedoc is designed to integrate seamlessly with an organisation's technology ecosystem. Through APIs, connectors and integrations with ERP, CRM, Microsoft 365 and other business applications, it automates the flow of information, eliminates duplicate tasks and maximises the value of existing technology investments.



DEPLOYMENT FREEDOM AND INFRASTRUCTURE CONTROL

Filedoc can be deployed in the cloud, on an organisation's own infrastructure (on-premises) or in hybrid environments. This flexibility allows organisations to choose the model that best fits their security policies, infrastructure requirements, operational needs and technology strategy.



PROPRIETARY TECHNOLOGY AND PROVEN EXPERIENCE

With over 20 years of experience and more than 1,000 client organisations, Filedoc is an established solution that is continuously developed using proprietary technology. Experience gained across different industries enables Filedoc to address real-world needs, from document management to the automation of complex business processes.

KEY FEATURES

Filedoc provides a comprehensive set of capabilities to manage information, digitise processes and automate operations. Its integrated architecture connects documents, people and systems in a single platform that adapts to each organisation's needs.

INFORMATION MANAGEMENT

DOCUMENT AND EMAIL MANAGEMENT

Centralise and organise documents, emails and other content, regardless of their source or format. Filedoc lets you capture, classify, archive and manage information throughout its lifecycle, including through integration with Microsoft Outlook.

DOCUMENT CREATION AND VERSION CONTROL

Create, edit and manage documents using standardised templates while maintaining a full history of changes and versions. Filedoc ensures control throughout the document lifecycle, from creation to archiving.

ARTIFICIAL INTELLIGENCE AND INTELLIGENT PROCESSING

Automate document classification, data extraction and content interpretation using artificial intelligence technologies. Filedoc also enables organisations to access and explore organisational knowledge through natural-language search and intelligent assistants.

INTELLIGENT SEARCH

Quickly find and access documents, emails and processes by searching attributes, content and full text. Artificial intelligence enhances traditional search methods with natural-language queries and contextual access to organisational knowledge.

DIGITISATION AND AUTOMATION

PROCESS AND WORKFLOW MANAGEMENT

Design, standardise and automate processes using an advanced workflow engine with visual configuration and no coding required. Define stages, rules, validations, approvals, notifications and deadlines, ensuring consistent procedures and adapting workflows to the organisation's needs.

TASK AND WORK QUEUE MANAGEMENT

Track all tasks and activities associated with processes in one central area. Organise work items by priority, deadline, owner or other criteria, with alerts and notifications that help teams meet deadlines.

ELECTRONIC FORMS

Create customised web forms with no coding required, available across different devices. Collect structured information, validate data and automatically trigger workflows, simplifying the digitisation of internal and external procedures.

ELECTRONIC SIGNATURES

Sign documents and collect electronic signatures, integrating them directly into approval processes. Simplify signing for employees, clients and suppliers by using different signature methods suited to the requirements of each process.

INTEGRATION AND COLLABORATION

INTEGRATION WITH OTHER SYSTEMS

Integrate Filedoc with ERP, CRM, email platforms, human resources systems and other business applications. Use APIs and connectors to automate the exchange of information between systems, avoiding duplicate records and manual tasks.

PORTALS AND EXTERNAL COLLABORATION

Make forms, documents and processes available to clients, suppliers and other parties through web portals. Simplify information collection, request submission and interaction with participants outside the organisation.

MULTI-COMPANY MANAGEMENT

Manage documents and processes across different companies within a group on a single platform, while ensuring information separation, access permissions and centralised management.

MOBILITY

Access documents, review processes, complete tasks and take part in approval workflows from mobile devices. Filedoc provides web access and mobile applications for Android and iOS.

CONTROL AND MANAGEMENT

SECURITY, PERMISSIONS AND TRACEABILITY

Protect information through authentication mechanisms, access profiles and granular permissions. Maintain a record of all operations performed on documents and processes, ensuring traceability and auditability.

REPORTING AND MANAGEMENT INDICATORS

Track document activity and process performance through reports and indicators. Analyse volumes, processing times, outstanding tasks and deadline compliance to identify opportunities for continuous improvement.

FILEDOC EDITIONS

Filedoc offers different editions tailored to the size, complexity and needs of each organisation, enabling it to evolve from a document management solution into an advanced automation and artificial intelligence platform.

FILEDOC ESSENTIALS SaaS

A preconfigured, cloud-based document management solution that is quick to deploy. It includes the essential capabilities needed to centralise documents, manage tasks and begin digitising processes, with a cost-effective entry point.

FILEDOC ADVANCE

A complete platform for document management, email and process automation, with advanced, customisable workflows.

FILEDOC VISION

The most advanced Filedoc edition, combining all the capabilities of Advance with integrated artificial intelligence and extensibility.

ADDITIONAL MODULES

Filedoc provides solutions and modules that extend the platform's capabilities, extend its use to external parties and automate specific processes

FILEDOC CLOUD SERVICES

Filedoc Cloud Services makes Filedoc capabilities available online, enabling interaction with users and external parties through several modules:

Service Portal: allows clients, suppliers and partners to submit documents and review processes.

Web Forms: allows organisations to publish web forms that automatically record information and can initiate workflows.

Filedoc Mobile App: provides access to documents, tasks and processes from iOS and Android devices.

FILEDOC SIGN

An electronic signature solution integrated with Filedoc that simplifies signature collection, speeds up document completion and centralises the management of signature processes.

INTELLIGENT DOCUMENT PROCESSING

Uses artificial intelligence to automatically identify and extract data from documents such as invoices, credit notes, delivery notes and receipts, feeding data into workflows and simplifying integration with ERP systems.



Alameda António Sérgio nº 22, 4º A
1495-132 Algés • Portugal

Phone: +351 214 201 600
E-mail: info@filedoc.com
www.filedoc.com