DocFlow Creatio

Developed on Creatio platform, DocFlow Creatio application enables automatic workflow and offers management of production, registration, approval, execution and archiving of company's documents.

Use cases

Broad functionality of the application and its close interaction with the CRM and digital processes make it a unique addition to separate processes or software for a certain function (for example, recordkeeping or contract library management), as well as an independent ecosystem of full control of the document circulation and lifecycle. Flexible licensing policy makes it a perfect document automation tool for both small companies and big corporations processing thousands of documents every day.

Key features

- **Document digitalization**
  Register digital documents based on incoming emails. Convert incoming and created paper documents into a digital format using batch scanning and automated attaching of the scanned image to the document's card. Store on paper only the necessary original copies of the documents. Minimize the physical movement and storage of documents and attributable risks.

- **Document management**
  Register incoming and outgoing mail with an automated notification to the interested parties. Verify and use digital signature. Carry out digital voting and approval of documents. Manage versions of the documents you created. Use flexible system of granting access rights to documents. Enjoy the mechanism of control of use of the documents (reading, copying, printing). Manage the lifecycle of a digital document from its creation to automated deletion.

- **Library management**
  Create libraries of uniform digital documents for more comfortable management (e.g., library of contracts, etc.). Within the scope of access rights granted to them let users create their own virtual libraries of selected documents without duplicating them.

- **Register of document cases**
  Form groups of digital documents united by one topic or business process (document case). Create relations with other objects of the system (person, partner, client, employee, unit etc.), and relations with the register of paper cases in archive. Manage the lifecycle of the document case from the moment it was created till its full deletion after expiration of the storage term.

- **Management of archive of paper documents**
  Register archive documents and dossiers. Use relations to digital documents and digital dossier, register of issuing and accepting paper documents. Exercise control of documents "en route". Manage the storage lifecycle of paper documents, receive digital tasks and list of archive cases to be taken out and destroyed, as well as the related paper documents according to the set regulations of storage. Gain full control over compliance to GDPR requirements.

Both English and Russian software interfaces are available.

Confero Technologies is a Latvian IT company offering all-inclusive IT services for enterprises and financial institutions and developing its own software products. Our mission is to guarantee the consistency of clients' business processes. We are the official partner of FICO Tonbeller and Creatio. The high level of quality and information security of our operation is acknowledged by international certificates ISO 9001 and ISO/IEC 27001.

Creatio is an intellectual platform for business process management and CRM. It optimizes and accelerates sales, marketing and service processes, as well as operational processes in the organization. Creatio Marketplace features add-ons, software solutions, connectors and templates for improving user experience with Creatio platform and products and introducing automation into different business tasks.