

Smart Doc Hub™

Overview

Smart Doc Hub is a cloud-based, enterprise-grade document management solution. By centralising the necessary data, Smart Doc Hub automates the creation of branded documents such as contracts, bills, statements, terms and conditions and more. Users can manage these documents centrally, with functionality to update templates, redact documents and action version control.

Features

- ✓ **Branded templates:** upload custom branded templates for any document; contracts, statements, bills, terms and conditions and more
- ✓ **Automatically generated:** automatically trigger document creation and population of customer specific data
- ✓ **Versioning:** detailed history and tracking of document versions including version numbers, active dates and version statuses
- ✓ **Document management:** centralised repository of all document versions, with filter options by customer, by version and more
- ✓ **Contracts:** automatically generate custom contracts populated with customer and account specific data
- ✓ **Statements:** automatically generate custom statements with customer and account specific data
- ✓ **Bills:** automatically generate custom bills with customer and account specific data
- ✓ **Document redaction:** redact sensitive information using redaction tools
- ✓ **Low code:** upload new document versions and publish in a web-based editor
- ✓ **Seamless integration:** connect to current core software or use in combination with other Clear Dynamics modules

Branded templates

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	↓ Id	Name	Created	Created User	Last Modified	Last Modified User	Tags	Customers
Admin	4	Bank Feed Terms Of Use	11/04/2019	adam.rapkins@cleardynamics.com.au	29/05/2019	kane.coulton@cleardynamics.com.au		
📄 User Preferences	3	DirectDebit	09/04/2019	adam.rapkins@cleardynamics.com.au	03/06/2019	kane.coulton@cleardynamics.com.au		
📄 Dashboards	2	LoanContract	01/02/2019	adam.rapkins@cleardynamics.com.au	26/06/2019	kane.coulton@cleardynamics.com.au		
📄 User Profiles	1	Statement	31/01/2019	adam.rapkins@cleardynamics.com.au	06/06/2019	kane.coulton@cleardynamics.com.au		
📄 Roles								
📄 Client Message Queues								
📄 Reports								
📄 Logs								
📄 Tags								
📄 Documents								
🕒 Scheduled Tasks								
Templates								
📄 Templates								
📄 Fragments								
🔗 Template Types								
📄 Template Requests								
📄 Tag Documentation								
Documents								
📄 Smart Documents								
📄 Customers								

Versioning

☰

- Admin
- User Preferences
- Dashboards
- User Profiles
- Roles
- Client Message Queues
- Reports
- Logs
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- Documents
- Scheduled Tasks
- Templates**
- Templates
- Fragments
- Template Types
- Template Requests
- Tag Documentation
- Documents
- Smart Documents
- Customers

Template

Template

File Name	Your Personal Loan Statement.docx	Tags	Select...
Name	Statement	Customers	Select...
Purge After (Days)	40	Comments	
Template Type	Statement		
	<input checked="" type="checkbox"/> Output As PDF		
Created	31/01/2019	Last Modified	06/06/2019
Created User	adam.rapkins@cleardynamics.com.	Last Modified User	kane.coulton@cleardynamics.com.i

Versions

+	Id	Version	Status	Uploaded Date	File Name
	44	1	New	09/08/2019, 5:16 pm	Visualisation.png
	1	0	Published	11/04/2019, 7:43 am	Your Personal Loan Statement.docx

Testing

Test Payload

```


1  {
2    "accountName": "Melody Gardot",
3    "startDate": "2019-01-22T04:59:13.6411765Z",
4    "endDate": "2019-01-22T04:59:13.6411765Z",
5    "StatementForCustomerId": 1301,
6    "AccountNumber": "2760497138",
7    "OpeningBalance": 0,
8    "ClosingBalance": 20000,

```

Document redaction

Smart Document Manual Redaction

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Opening balance
Total credits
Total debits
Closing balance

Statement starts September
Statement ends November

Outlet Details

Account Details

Transaction Details

Date	Particulars	Debits	Credits	Balance
Sep 2017	Brought forward			
Sep 2017	Internet Transfer cc	300.00		
Sep 2017	Interest			
Oct 2017		200.00		
		140.00		

Audit Events