Smart Doc Hub TM

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

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

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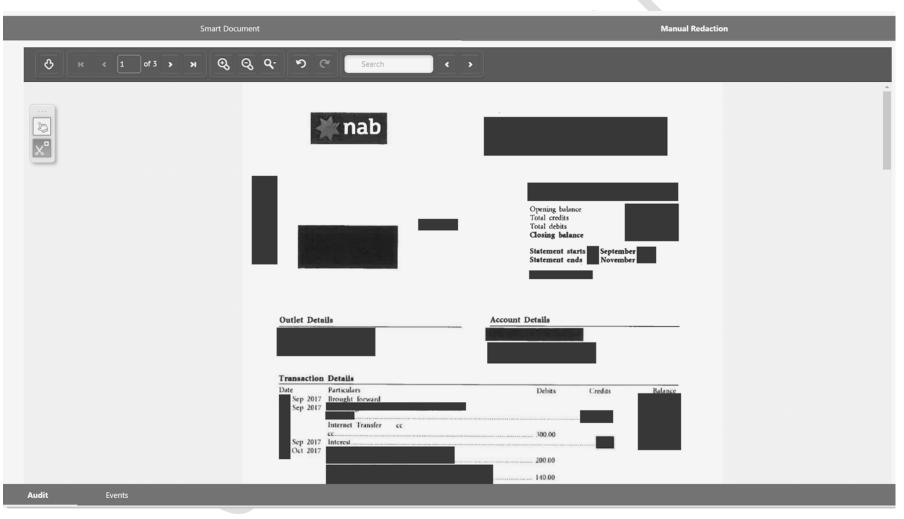
Versioning

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Document redaction



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