

$$1 + 1 = 2$$

# Partner <sup>XE</sup>

## Partner XE™ DOCBox™

*Your Data, Your Business: Our Number One Priority*

**Moving to a paperless environment is a goal for many agencies, but a reality for very few.**

With Partner XE's DOCBox, an internal transactional filing system designed to be compliant with existing E&O standards, effectively managing storage and storing all your system files and activities, you never have to worry about losing physical copies of papers or misplacing information in the wrong file.

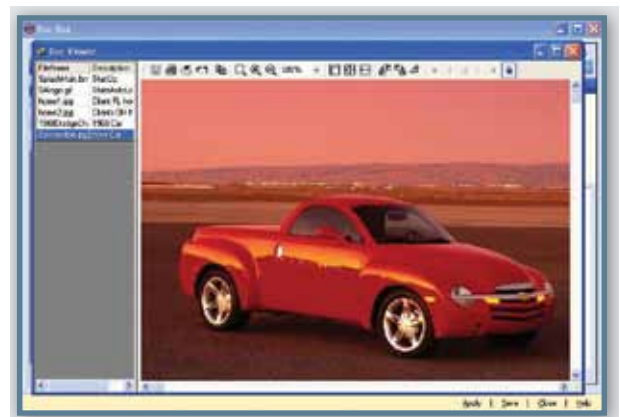
The ability to store a variety of information — from Word documents to scanned images or digital photographs — and gather them into one place in your agency management system is a great step toward achieving a paperless environment.

Partner XE's improved design and technology makes the handling of documents — storage and retrieval — quicker and easier than ever before.

## DOCBox makes it easy:

Take advantage of:

- Acquisition and importation of documents
- Workflow management of document
- Assignment to different types of profiles
- Storage of documents in a centralized location
- Permission-based security mechanism
- Image preview, print and email
- Supports most file formats (e.g. PDF, TIFF, JPEG and BMP)
- Drag and drop file transfer
- Supports simultaneous multiple users' access



**Go Paperless**

Contact SIS Today!

1-800-747-9273

[sales@sisware.com](mailto:sales@sisware.com)



simple.innovative.secure

### How it works:

- 1 Each user has their own document working area or “Inbox,” which represents a pending and temporary storage area
- 2 External images may be added to the system directly from a TWAIN compliant device such as a scanner or digital camera.
- 3 Internal Users have the ability to import documents from a network folder or local hard drive.
- 4 Working images can be previewed before attaching them to specific clients, individuals, contacts, policies or claims (profile).
- 5 A group feature that allows the user to link multiple images to a single profile.
- 6 Images reside in the Inbox until you assign them to the appropriate profile, giving you the luxury of bringing in multiple images and then assigning them to the appropriate profiles at a later time.
- 7 Each user has the ability to promote documents to a separate folder or “Common Objects” folder that will allow the document to reside within Doc Box indefinitely.
- 8 Users are able to assign a document to multiple profiles without removing the file from Doc Box.

**The storage and retrieval of documents is quicker, easier and more secure than ever with Partner XE’s Document Storage System. Ultimately, Doc Box helps you save money in time, paper and storage costs and brings you one step closer to achieving the paperless environment goal.**

### What Our Clients Say:

*“I can’t imagine how many hours I have saved because the Doc Box feature is so easy to use. ...You can always find the document you’re looking for. It’s always where it’s supposed to be in the system. And there’s never a time when someone is working on something and I have a document that they need on my desk, because it’s scanned, so we both can access it at the same time.”*

*Leslie Huesman,  
Agency Owner, Cincinnati Ohio*

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