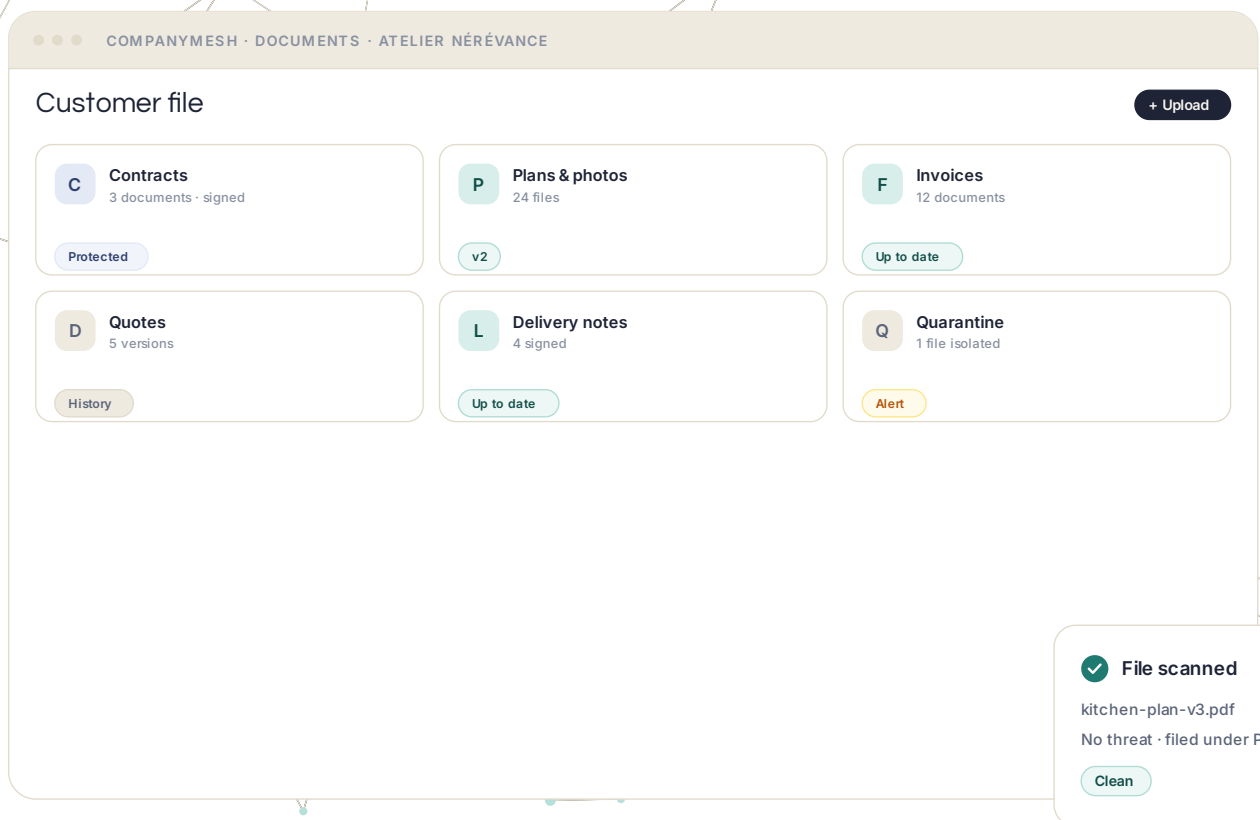


DOCUMENTS

DMS & media library

Every document found in seconds, and properly protected.



Every document found in seconds, and properly protected.

A DMS (document management system) files, shares and protects your documents in the same place as your records. Contracts, plans, photos, invoices, templates: everything is filed, searchable, shared with the right people and scanned before it enters your system.

Everything in one place

Documents linked to customers, projects and orders.

Instant search

By name, customer, type or content.

Controlled sharing

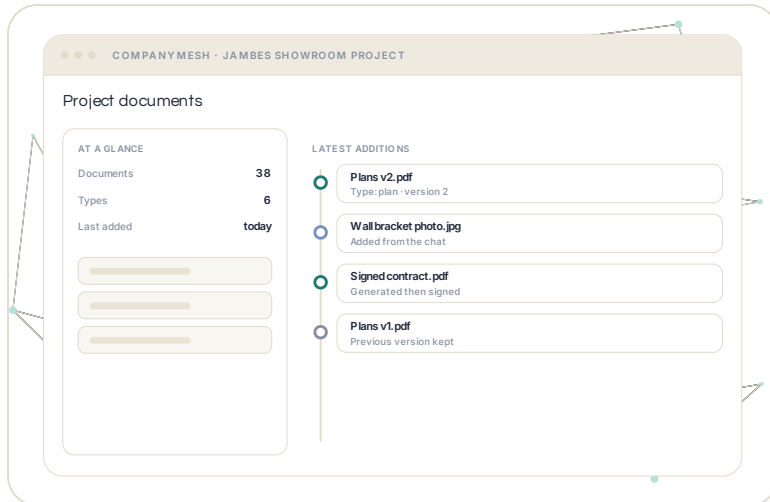
Secure links, precise permissions, tracked access.

Stronger security

Virus scanning and quarantine for uploaded files.

In this module

- 1 Automatic filing
- 2 Powerful search
- 3 Sharing and upload links
- 4 Precise access rights
- 5 Scanning and quarantine
- 6 Document generation



1 Automatic filing

Every document in the right place.

Documents you generate or receive are filed automatically in the right customer, project or order folder. Document types and tags make sorting easy.

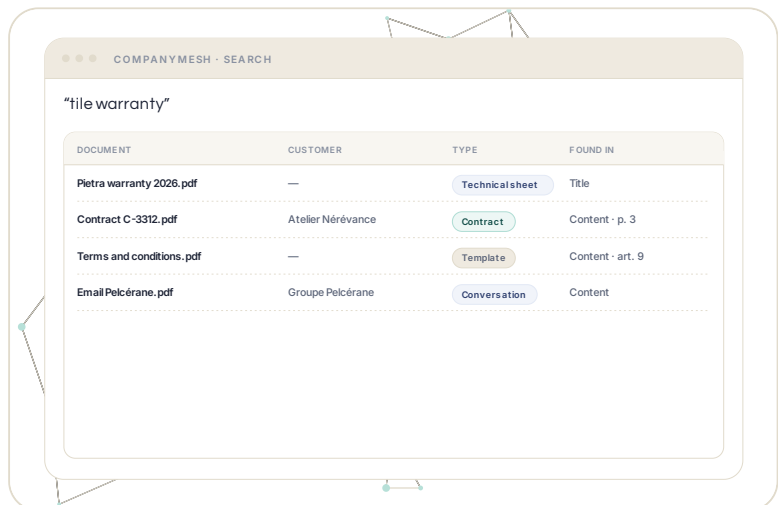
What it enables

- Linked to customers, projects and orders
- Document types and tags
- Every version kept
- Central media library (images, logos, videos)

2 Powerful search

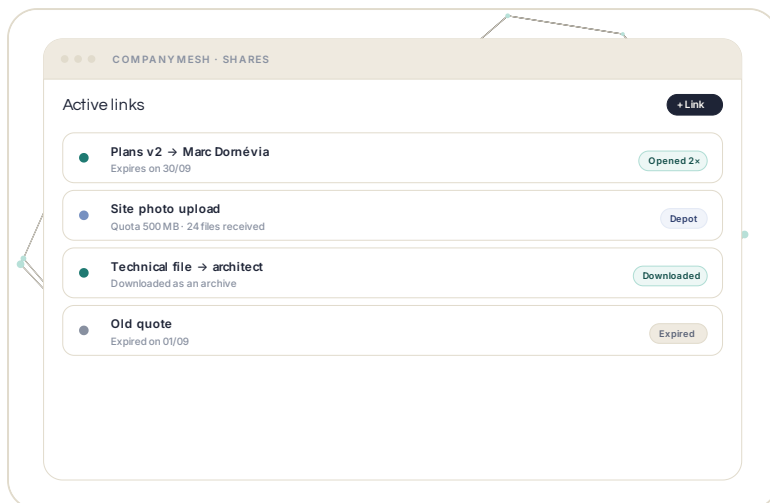
Find a document without remembering where it is.

Search covers names, metadata and, as an option, the content of the documents themselves thanks to text recognition.



What it enables

- Search by name, customer, type, date
- Full-text search in content (OCR)
- Combined filters
- Preview without downloading



3 Sharing and upload links

Exchange files, no attachments needed.

Share a document or folder through a secure link with an expiry date. Receive files from your customers through an upload link, with a quota.

What it enables

- Share links with expiry
- Upload links with quota
- Opens and downloads tracked
- Bulk download as an archive

4 Precise access rights

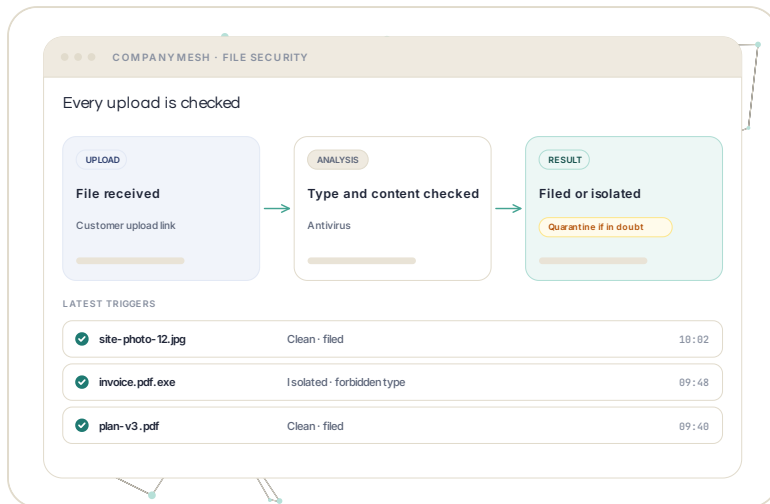
Everyone sees what they need to see.

Permissions are set by folder, by document type or by profile. Sensitive documents (payroll, contracts) stay restricted to authorised people.

TYPE	SALES REP	ACCOUNTING	WORKSHOP	CUSTOMER
Quotes & contracts	Edit	Read	None	Read
Invoices	Read	Edit	None	Read
Plans	Edit	None	Read	Read
HR documents	None	Vault	None	None

What it enables

- Permissions by folder and type
- Document vault for sensitive files
- Access log
- Limited access for customers and suppliers



5 Scanning and quarantine

No suspicious file gets in.

Every uploaded file is scanned. A suspicious file is isolated in quarantine and flagged, and never made available.

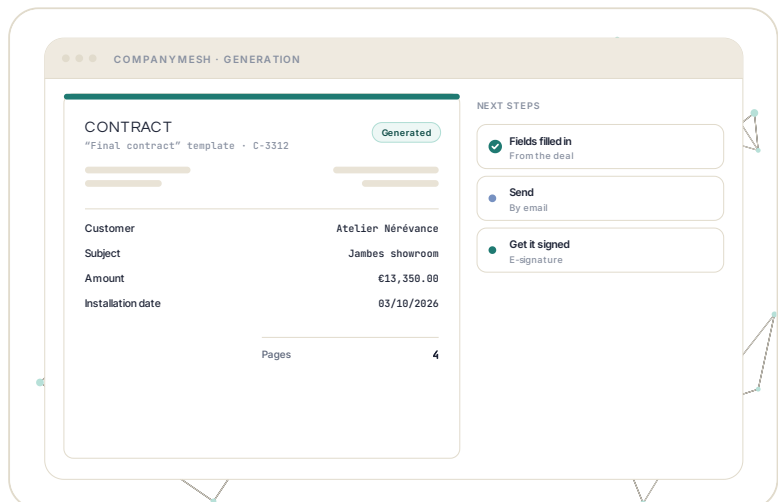
What it enables

- Virus scan on upload
- Automatic quarantine
- File type control
- Security alerts

6 Document generation

Your templates, filled in automatically.

Contracts, order forms, certificates and letters are generated as PDFs from templates and the record's data, ready to send or sign.



What it enables

- Document templates
- Fields filled in automatically
- PDFs in your house style
- Send or sign in one click

TAILORED

Adapted to your business

Folder structure, document types, permissions by profile, retention periods, automatically generated templates (contracts, order forms, certificates): we organise the DMS around **your** ways of working and **your** archiving obligations.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Storage

Google Drive

OneDrive / SharePoint

Dropbox

Documents

PDF

Word

Excel

Images

Document reading (OCR)

Apache Tika

OpenAI

Mistral

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

dms.sign E-signature

crm.portal Client portal

crm.contacts Customers & contacts

dms.compliance Verification & compliance

auto.ai Built-in AI

Let's talk about your future tool

Tailored demo, by appointment.

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