

File Templates

File Templates is an essential productivity tool in document management software that allows you to quickly regenerate repetitive documents. If your organization deals with creating contracts, agreements, communication letters, etc. frequently, the File Templates feature can be a very valuable time saving feature. You can save multiple drafts of such documents in file templates and can easily recreate them in the system as necessary. For instance you can use a File Template to create a sales contract using a ready draft format. With just a few clicks your users can choose the appropriate file template from a list and be on their way finishing up the document without wasting any time looking for older documents to use as drafts.

Highlights

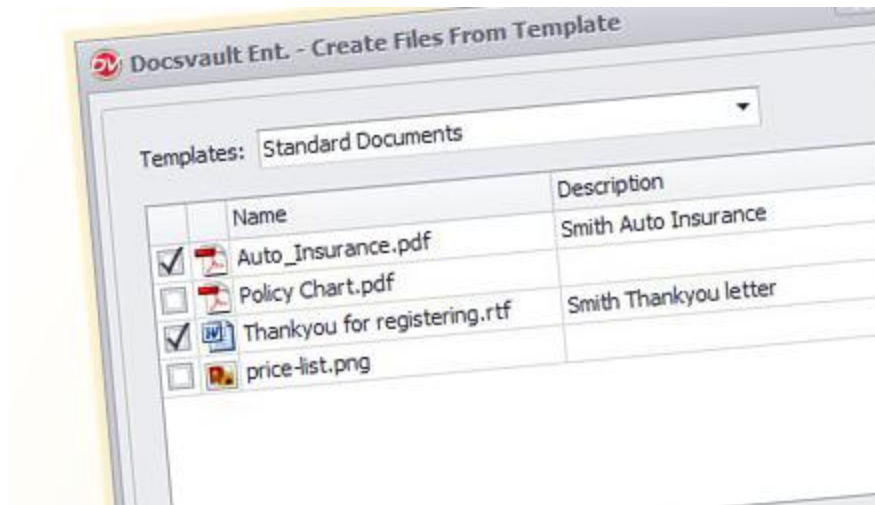
- ✓ Create several file templates and use them when creating new documents
- ✓ Select a file template and start work instantly on any standard document format
- ✓ Set a uniform file and communication policy and ensure smooth file management
- ✓ Save time on mundane activities like recreating standard documents

What It Means For You?

File template is a very crucial document management feature that allows your users to create repetitive documents in a few clicks. Apart from that you can also ensure a standard communication policy as all your outgoing response would follow a specific template. Moreover, when your documents are consistent, the time spent on searching documents is reduced significantly. This practice not only helps save time but also ensures that all your files meet the standard documentation procedure in your organization.

Solutions

- **Uniform Filing Policy**
It has become crucial for all companies to have a uniform filing policy so that their documents are well organized and can be easily retrieved.
- **Fast Retrieval**
When your documents are neatly organized and quickly retrievable, the time spent on searching documents during e-Discovery significantly reduces



Create files from Template

Fast Facts

1. Besides helping you save time, file templates are a great communication tool as it allows you to create a standard format for letters, proposals and other communications
2. You can create as many templates you want and even delete them later without affecting the previously created documents through those templates
3. A File Template can consist of multiple files and users can select files to be created at the time of use

Other Productivity Tools

- **Document Profiling**
Set custom index fields and enter index values when creating a folder or importing a document for easy categorization, search and retrieval.
- **Folder templates**
Create predefined folder and file structures in one click with folder properties like predefined security, profile, columns and audit trail settings.

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