DynaFile
Your Documents. On Demand.

The Paperless Office Guide

A Quick Start Guide for Going Paperless

Welcome to the paperless office.

The management and storage of documents and information is critical to any business. A paperless filing system should house all documentation involved with daily operations as well as serve as a tool for prospecting, sales and compliance audits. In other words, don't just go paperless, but make your paperless office work for you. Your paperless office solution should do everything to fill the gaps and maximize resources in your business including:

+ Providing a centralized location to store critical files which is securely stored to
   prevent loss of data and disaster recovery.

+ Integrating with other software solutions to streamline the process of conducting daily business
   while automating the storage of documents.

+ Supporting internal and external real-time collaboration through document annotating, commenting,
   sharing and remote access.

+ Giving control over user accessibility by user type, group or time frame.

+ Providing means of customizing do cument organization and indexing through custom fields,
   filters and categories so that it meets or exceeds the current filing system.

+ Establish a standard document viewing portal that eliminates compatibility issues between
   users and guests.

+ Eliminate the need for additional hardware or resources to support and maintain the paperless system
   including technical departments or network administrators.

A paperless office reaches far beyond converting paper documents into digital assets. DynaFile's Paperless Office solution has improved business operations of businesses, departments and professionals in all industries.

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Who's going paperless?

Meet Dave.
Industrial Broker
Commercial Real Estate

Being on the road 90% of my workday meant less time in the office collaborating with my support team. I needed to find a way to centralize my listings, marketing sheets, due dilligence and contract forms so that my team and I could access them at the same time regarless of what site I was at. When it comes to selling multi-million dollar industrial bulidings, time is money and my clients appreciate efficiency. Since implementing a paperless office system, my team and I have secured more clients, improved collaboration and closed more deals.

Meet Kristen.
Mortgage Broker
Mortgage and Lending

Our curernt loan origination software was great for taking in applications and processing loan documents. But when it came to the applicant's information such as income statements and tax forms, we found that we were drowning in disorganized paper and the time it took to reconcile these documents was too long. We were able to integrate DynaFile with our current LOS so that a simple barcode placed on top of a stack of papers would automatically sort files into their respective cateogries. Now, we're ready for any regulatory or compliance audit that may come with our organized paperless filing system.

Meet Mark.
Attorney
Legal Services

The due diligence process for one legal case involves overflowing file boxes and heavy files. We needed a solution to eliminate the rigourous process of copying and sending due diligence to external parties. We chose to go paperless to resolve this inefficiency and we now have the capabilities to compress thousands of documents into one electronic file and send them out with a few keyboard clicks.

Should you go paperless?

The decision to go paperless is often made with cost savings and organizational benefits in mind. Yet, a paperless office can benefit more than a business's year end statement, especially when it comes to client communication and process efficiency.

Here are some reasons why going paperless may be the best decision for your company:

Problem

+ Storage Space
Document Management systems that store files on a hard drive or server can lag basic software functions, slow down computers or consume storage space too quickly.

+ Delayed Communication
Communication with prospects and clients is interfered with lost emails, delayed mail and unanswered phone calls. Failed delivery of contracts or sales documents can delay transactions for weeks.

+ Compatibility Issues
Many software programs used to run businesses have specialized file formats that make it difficult to collaborate with clients that don't have that program installed.

+ Quality control
The process of retrieving and compiling documents for sales, bookkeeping or regulatory auditing is hindered by unorganized or lost files.

DynaFile's Solution

+ DynaFile is web-based and houses all electronic documents on a cloud-based server, eliminating the risk of running out of storage space or lowering the performance of other software programs.

+ DynaFile offers several means of delivering documents to your clients or partners.
Electronic faxing is enabled directly from the DynaFile interface without printing or extra fees. Email documents to client inboxes or publish secure encrypted links that preserve security while eliminating attachments.

+ Multiple file types are converted into one common format.
DynaFile is unique in that it converts files on the fly into standard formats that can be easily viewed on a web browser while conserving the original file format in the paperless filing cabinet.

+ DynaFile enables documents to be stored in a centralized location and documents are accessible by multiple viewers at one time.
Organizing documents with custom fields allows search and filtering through files by client, date, document type, status, or any other custom filter created.

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Going paperless with DynaFile.

Many document management and paperless office solutions require a long list of software and hardware needed to execute all of the capabilities that DynaFile offers. The main benefit of using a web-based document management system is that bulky software installation with complicated configuration is avoided.

No software to download

With DynaFile, businesses do not need to install software to start paperless filing. The solution is 100% web-based and accessible with any internet connection and web browser. This enables your paperless office to go live faster and more efficiently.

Convenient modules for uploading

DynaFile offers optional modules at no additional cost to upload files into the paperless filing cabinet. This includes the Print-to DynaFile module that can take any web page or document on your computer and virtually print it directly into the system. The Save-To DynaFile module works just like saving a document on your local computer, except that it saves directly into DynaFile. The Barcode scanning module helps with automating scanning processes by using barcodes that tell DynaFile where to put a document.

Web-based file hosting

Each company chooses its own URL where all files will be hosted and accessed. This means that authorized users can access documents from the office, on the road or any place with an internet connection. Files are securely stored in multiple locations making a reliable disaster recovery solution. Additionally, all updates to the system are made by DynaFile network administrators.

Unlimited users and groups

With DynaFile, unlimited amounts of users can be assigned with custom permissions and controls at no additional cost. The security benefits of DynaFile include customized access permissions that can block certain users from one type of document or allow access for only a limited time.

Going paperless with DynaFile

Easy Integration
DynaFile's robust API can provide direct integration with internal or third party software programs, CRM and accounting management systems. This can allow files to be saved directly from the third party solution into DynaFile without having to upload or print and scan separately.

Multiple Documents Types
DynaFile can store any type of electronic document including Microsoft Office documents, PDFs, images, emails and all of your paper files in one central location.

### One-Click Document Retrieval
Unlike traditional document storage facilities that charge per document retrieved, DynaFile enables businesses to access and retrieve, print, download, or share files with a few clicks and without extra costs.

Customized Document Indexing
Documents can be organized or categorized using custom indexing fields that are easily filtered through in the DynaFile interface.

Simple Payment Methods
DynaFile is conveniently offered on a subscription basis starting at $350/month with extra storage space options available at $50/GB to meet specific business or departmental needs. See how much DynaFile can save you in the first year...
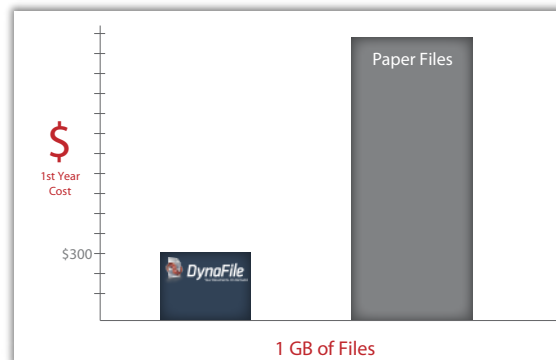
Every business has different document management needs. To get an quote for your documents, contact DynaFile for a free estimate.

www.dynafile.com/contact
1-888-510-FILE (3453)

Planning the Paperless Office

Picking the right solution

Finding the right filing solution doesn't have to be so overwhelming. Use the checklist below to see if a paperless solution might be right for your business.

Check all that apply.

	DynaFile	File Storage Facility	Filing Cabinets
☐ I need to store a large amount of files.	✔	✔	✔
☐ I need to retrieve files every day.	✔		✔
☐ I need to access files remotely.	✔		
☐ I need to collaborate on files with others.	✔		
☐ I need to track revisions as they occur.	✔		
☐ I need to know who created a file.	✔		
☐ I need to centralize files for multiple offices	✔	✔	
☐ I need to comment on files.	✔		✔
☐ I need to have files electronically signed.	✔		
☐ I need to easily archive files for an extended period of time	✔	✔	
☐ I need to control who views a file.	✔		
☐ I need to save money on shipping costs.	✔		
	DynaFile lets you accomplish all of these at an affordable cost.	File storage facilities are designed for large amounts of files that don't need to be accessed often.	An additional filing cabinet might suit your needs.

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Planning the Paperless Office

4 Key Questions to Ask

The first step in planning your paperless office is identifying your document needs. Start by answering these four questions:

+ How should paperless files be organized?
The answer to this question can frequently be adopted from your current filing system. For example, "documents are organized in file cabinets according to year, then client files, then sectioned by sale type.

+ What kind of documents are used?
Example: Sales documents, order forms, payment receipts, contracts

+ Who are the document users?
Example: Sales representatives are the authors, sales managers are collaborators

+ How are documents used?
Example: Internally, documents are reviewed by the Sales person, the Sales Manager, the Bookkeeper and faxed to the CPA.

+ Form a document management structure

Paperless File	Document Type	Sections	Authors	Collaborators	Use
__ Client	✓ Contract	__ Sale	✓ Sales	__ Accounts	__ Email
__ Vendor	__ Invoice	✓ Accounting	__ Manager	__ Clients	✓ Fax
✓ Date	✓ Order	__ Archive	__ Client	__ Vendors	__ Publish
__ Invoice #	__ RFP	__ Status	__ Assistant	__ Publisher	__ Archive
__ Location	__ Proposal	✓ Change	__ CXO	✓ Partner	__ Sign
					__ Annotate

Every business or department has its own document management needs.
Find out how DynaFile can help yours by calling 1-888-510-FILE (3453)