

open attach[®]

Effective File Management

What is Open Attach?

Open Attach allows you to attach any files, including Open GI and Microsoft® family documents (Word, Excel, Publisher, etc.) to a Prospect, Client or Policy record within the Open GI Core Back-Office.

Open Attach provides read only storage of documents, locking them against editing and deletion within a secure electronic 'vault'.

The secure vault allows you to manage your files so that they can be used to meet regulatory requirements that call for non-amendable documents or original copies.

Open Attach provides an easy to use interface that allows you to quickly open related files and documents, with advanced filtering to make document searches easier.

BENEFITS

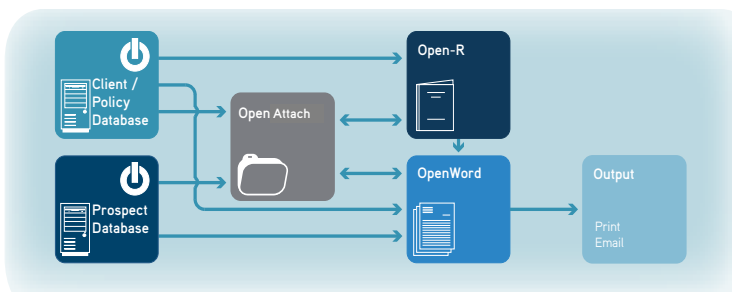
- 1 Easily handle client & prospect related documents
- 2 Reduce time spent searching through paper filing for hard copies
- 3 Documents & files are immediately stored against client or prospect records
- 4 Drastically reduce your business reliance on paper
- 5 Decrease stationery costs
- 6 Improve efficiency & service with desktop access to documents in client specific files
- 7 Eliminate the possibility of files being delayed in filing or lost
- 8 Enhance client / policy records with images & email
- 9 Improve audit trails with more risk detail on-hand in the event of any claim

How it all works?

Open Attach automatically links from the Prospect / Client record to electronic documents created outside of the Open GI Core Back-Office.

Templates can be set up to speed up file creation and these are selected on demand.

Secure storage in the Vault facility of Open Attach is managed through integration with Windows® security features.



What can it do for me?

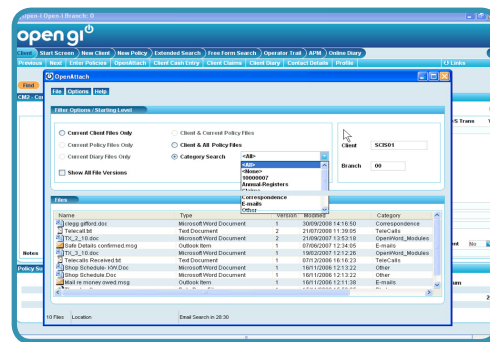
Open Attach provides you with complete control over your document production. The software securely stores, manages and organises documents, simplifying records, eliminating hard copy files and providing staff with easy access from their desktop.

Open Attach allows staff to refer to client / prospect files stored in the Core system whilst on the telephone and with integration Microsoft Outlook documents can be sent securely improving overall customer service.

By removing the business reliance on hard copy files, Open Attach removes the majority of stationery costs from the business whilst supporting your environmental policies.

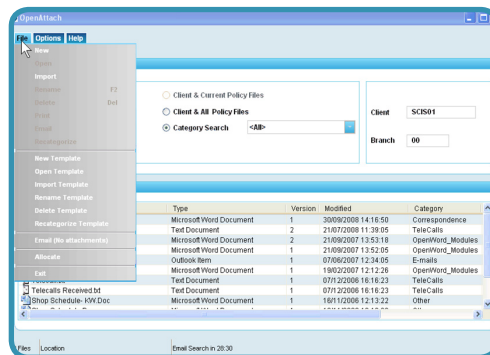
Open Attach main screen

The operator is able to display all documents along with versions, which have been stored within the Open Attach folder.



File menu

Import existing templates or create new templates. Launch e-mail facility from within this menu, select to e-mail client, or create an e-mail and attach a document.



For more information about Open Attach call

01905 857050

or email the sales team on

respond@opengi.co.uk