Document Management System

Challenge: Our customer provides consultancy to those who venture into new business. However, there are several cases in which government provides subsidy or gives loans at subsidized rates. Our customer has several clients almost up-to 150 of which few require continuous consultancy and few are contract based. Our customer has three different locations and several documents travel in between these locations. Moreover, there are approximately 6 different services our customer provides and approximately 40 different documents required for each service. Over and above this our customer has to know which client requires which document at what point of time and at which stage is his project. As one can observe the complexity our customer was dealing with was mind boggling.

Solution by Arun InfoTech: Arun Info Tech created a document management system for them, some modules of ERP and their website and finally integrated all three of them. Our customer need not have different consoles for different software's as all were integrated. As soon as one logs in he can see the clients name uploaded from inquiry form. He can choose a service from different services available and after choosing, all the corresponding forms become visible to him. He can again choose which forms the client has to submit. Submitted forms are scanned and then uploaded on the site itself so that he can see which are already submitted & which are yet to be submitted. Hence, a very complex task can now be handled by a very simple software based system. Apart from this facility, after logging in on the home tab one can see his reminders, daily tasks, news & events. He has an inquiry form on which inquiry can be filled in, searched and status can be seen. This filled inquiry comes in handy as mentioned above. Further, charges to be levied can also be controlled from this portal itself and then invoicing can be done, as well. Finally, tasks can be assigned to the team members by their team leader. These tasks can also be transferred between team members. A report can be generated and sent to the superior at the end of day which contains a comprehensive report on the work done throughout day. Below screen shot emulates partial document management system.

Enquiry Form:

Different forms according to service:

Reports generation page: