

M-FILES FOR PROFESSIONAL SERVICES DEMO VAULT DESCRIPTION



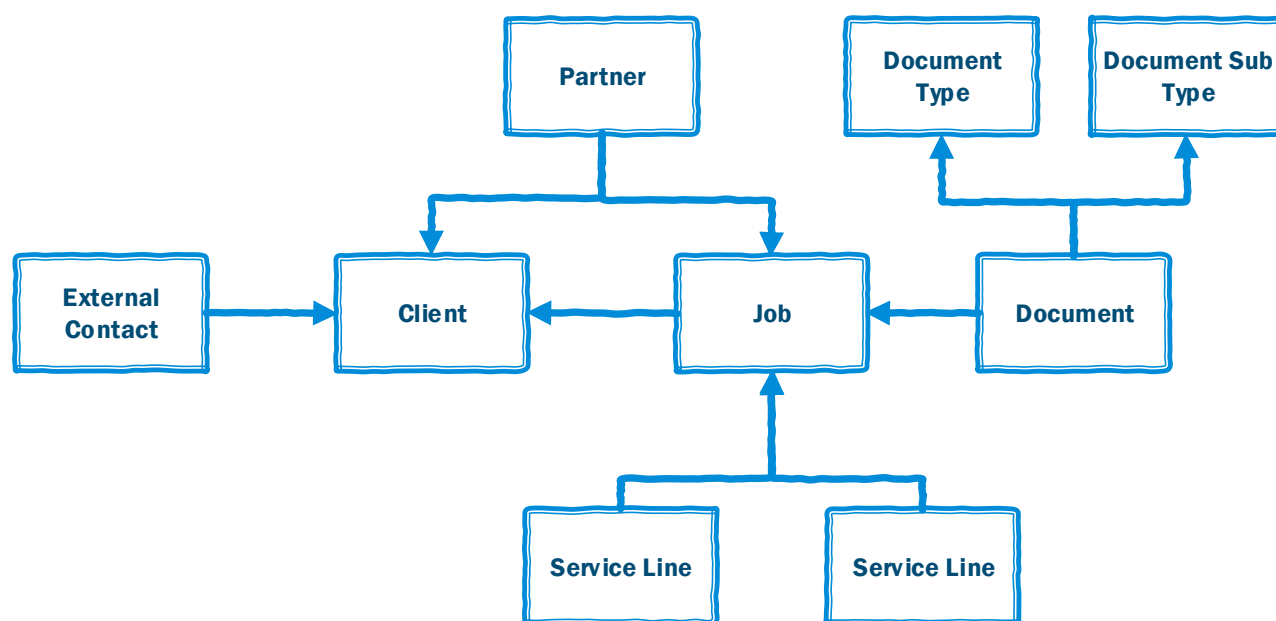
VERSION 1.1 | LAST UPDATED 7 JANUARY 2021

1. Description

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The Professional Services demo vault covers basic document management use cases that are relevant to manage Client and client Job related documents within companies that offer e.g. accounting, corporate professional services and advisory services.

Landscape for data flow is that Client, Job and related Partner information comes from CRM or as in many cases in this industry it is called, practice management system. Practice management system quite often also covers hour reporting and billing functionalities. When Client and Job information is transferred to M-Files, document management process starts in M-Files. Even though Job master data system is in practice management system, there is simple workflow in M-Files side to help keep track on documentation process.



Main vault structure elements

Instead of using document classes to categorize documents, there are Document Type and Document Sub Type objects to be used. Reason behind this is that it is common that companies have independent departments, service lines and locations that have their own document classification and needs. Even though it would be good to harmonize these, it is not necessarily possible or a priority among companies. Therefore, having more flexible way to classify documents is available in demo.

Professional service companies rely heavily on partners, their connections and reputations. Therefore, it is important that customer deliverables are reviewed and approved by partners. Client Document Sign-Off workflow is used to approve documents and by default Job Partner or Client Partner are set as Document Approver when document is created. Workflow has also Published statuses, but there is no functionality implemented to publish documents

anywhere. This use cases should be talked through to indicate that we can integrate to external services, but that is custom work.

1.1 Using Outlook Integration

Majority of people working in professional service area are Outlook heavy users, so demonstrating Advanced Outlook Add-In is quite common use case. Please see Advanced Outlook Add-In documentation for more details, below are short instructions how to setup Add-In to enable use case show in demo video.

2. Changes

07.01.2021:

- Compliance Kit updated to 20.10.911.3 (license updated too)
- Network Folder Connector updated to 20.8.9339.3
- Information Extractor updated to 20.8.9339.1

3. Links for more detailed info

More information in Partner Portal:

[M-Files for Professional Services - Business Case](#)

[M-Files for Professional Services - Messaging Summary](#)

[M-Files for Professional Services - Sales Presentation](#)

[M-Files for Professional Services - Flyer](#)

[M-Files for Professional Services - Sell Card](#)