

PARTNER TRAINING

MODULE 1. BASIC USER TRAINING

- Introduction
- Explorer and properties
- Notes and safety
- History, preview, and relationships
- Workflows and signatures
- Extensions, stamping and automation
- Templates, reports and search engine
- Task manager and OCR

MODULE 2. FEATURES

- Zonal OCR
- Relations
- Reports
- Stamps
- Templates
- Workflows
- Approval of workflows
- Audit
- Search engine
- Automations
- Email import
- Archive emails
- Task management
- Categories
- Comparación de versiones