PRODUCT INSIGHTS

eDOC EXECUTIVE

Tired of manually renaming hundreds of documents?

Quandri's eDoc Executive lets you quickly sort through thousands of attachments to find the right documents for an account by standardizing naming conventions.

WHAT WILL YOU GAIN?

Gain peace of mind when you send a customer revised documents using our eDoc Executive. The digital worker ensures the correct, accurate records are found by your team, and sent to your customer. As the account ages, you can easily find the correct documents and keep them organized.

The eDoc Executive re-labels documents contextually to improve the overall customer experience.

Plus, you can repurpose the hundreds of hours saved when you use the eDoc Executive. You gain more details in the document name through an expanded variable set.

QUANDRI'S FEATURES

Feature	Quandri	Basic BMS Functionality
Renaming documents	Yes, with 14 variables from PDFs and BMS.	Yes, with limited variables only from the BMS.
Separation of broker copy and insured copy	Yes	No
Close duplicate EDOC activities	Yes	No
Folder assignments	Yes	Sometimes
Reassign activities based on document activity types	Yes	No
Actions based on:	Document type	CSIO download codes

A customer repurposed 200 hours per month using our digital worker!

Want to see eDoc Executive in action?
Scan the QR code to book a demo!