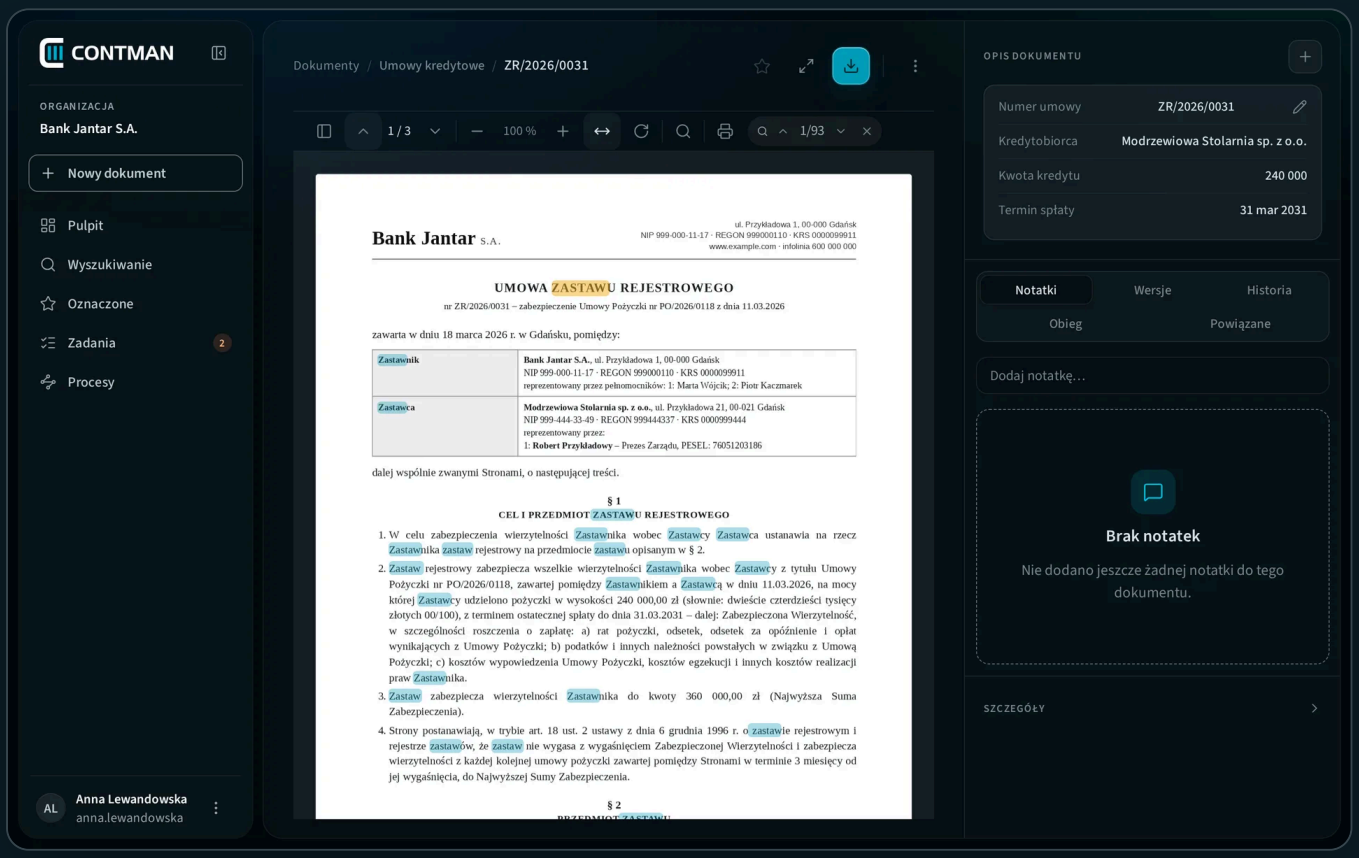
CONTMAN ARCHIVE · DOCUMENT ARCHIVE

An archive for leasing contracts.

Lease agreements, applications, legal attachments and settlement statements in one archive you open in your browser. Every document goes into its category with that category's description fields, so you find it by contract number, customer ID or tax number.



PRODUCT SCREEN · DESCRIBING AND FINDING A CONTRACT · SAMPLE DATA

CONTMAN ARCHIVE

One archive for all your leasing records

CONTMAN Archive is an electronic archive where your company stores and shares documents securely. Everything sits in one place instead of in paper folders, on drives and in mailboxes.

01

Categories that fit your company

Documents are kept in business categories such as contracts or invoices, and you shape the category structure yourself, for example separate categories for lease agreements, amendments and settlements.

02

One consistent description

Each category has defined description fields, and the person adding a document assigns it to a category and describes it. No more files labelled "Other".

03

Customer identifier

A document can carry a unique identifier, such as a customer ID or tax number, so you find all documents of one customer whatever their category.

04

Search

Search the archive by keywords, dates and description fields. Search ignores letter case and Polish diacritics and shows only documents from the categories the person may read.

05

Preview in the browser

PDF, Word, Excel or image files open right in the web application, with no need to download them, on a phone too.

06

Versions and history

Every change creates a new version of the file, and the history shows who accessed a document and when.

PAPER OR ARCHIVE

What changes when contracts are in the archive

AREA	PAPER, DRIVES, E-MAIL	CONTMAN ARCHIVE
Finding a contract	Binders, folders on drives and mailboxes.	Search by keywords, dates, description fields and customer identifier.
Access	Wherever the filing cabinet stands.	In the browser, from a computer, a tablet or a phone.
Who sees a document	Anyone with access to the cabinet or the folder.	Only authorised people, by roles and permissions; every change of permissions goes into a permanent audit log.
Changes to a document	Copies that are easy to mix up or overwrite.	Every change creates a new version, and the archive keeps every version of a file.
Teamwork	Copies, scans and post.	Sharing, notes and new versions in one place, with every change kept in the history.
Security	A lock on the cabinet.	An encrypted connection, files of chosen categories stored encrypted, backups on your administrator's schedule.
Space and cost	A physical archive and its upkeep.	No physical archive and none of the cost of keeping one.

Authenticity and integrity

Some documents, contracts among them, must be kept in a way that proves they are authentic and intact. CONTMAN Archive keeps every version of a file and checks the signatures and seals in documents.

EXISTING CONTRACTS

How to move your contracts into the archive

Moving your contracts takes a few steps, from setting up categories to the first search. The team works through them at its own pace, one category at a time.

01 **Set up categories and description fields**

For example contracts, amendments, payment schedules and customer documents, each with the fields your team searches by: contract number, customer ID, tax number, date.

02 **Grant roles and permissions**

Sales, customer service, finance and collections see only the categories they have access to.

03 **Scan or photograph the paper**

You add scans in the browser. With the CONTMAN Mobile app you photograph a document with your phone and it goes straight to the archive, to the right place.

04 **Add documents with their description**

Every file goes into the category chosen when it is added, and its description and content are indexed automatically. Larger collections can be moved through the API, because the archive offers every one of its functions through it.

05 **Recognise the text of scans**

CONTMAN DP reads scans and PDF files that have no text layer, in Polish and in English, so a scanned contract can be searched by its words.

06 **Check using real examples**

The team searches for a few known contracts by number and customer ID and checks that everyone sees what they should.

Checklist before you start

- Scale: how many contracts and customer documents, how many people will use the archive.
- The implementation team: IT, compliance and operations.
- The order and schedule for moving each category.
- Training for the people who add and describe documents.

NEW CONTRACTS

New documents, workflow and signature

01

CONTMAN ARCHIVE

Straight from your leasing system

Your business software connects to the archive through the API, with no changes on the archive's side. A new contract or amendment can reach the archive straight from the system that creates it.

02

CONTMAN WORKFLOW

Approval workflow

A workflow takes a document through approvals, branches, automatic steps and signatures. It starts automatically when the document reaches the archive, and everyone has their tasks in one inbox.

03

CONTMAN SIGN

Signature and seal

Your people sign PDF documents with their electronic signatures, advanced or qualified, and with the company seal, as a step of the workflow. The archive also supports integration with electronic signature systems.

04

CONTMAN ARCHIVE · CONTMAN MOBILE

In the field

The archive in the browser works on phone and tablet screens too, and photos of documents from the phone app go straight to the archive. Coming next in the app: search, document viewing, a task inbox and signing.

EXAMPLE · FICTIONAL DATA

A copy of an amendment in moments

A customer of Example Leasing asks for a copy of an amendment to their contract. The customer service agent enters the customer's tax number (NIP), sees all of that customer's contracts and amendments, opens the amendment in the preview without downloading it and shares it. The document's history records who accessed it and when.

CONTMAN

WHY CONTMAN

Business documents under control.

We work with banks, insurers, leasing companies, telecom operators, retail chains, logistics companies and public institutions.

Since 2000

in banking, leasing and insurance

7

products: Archive, Workflow, Sign, HR, AI, DP and Mobile

Book a demo. We'll show you how to describe, find and track contracts, using real examples.

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