DOCUMENT INTAKE

From client mailbox to bookkeeping

THE MOMENT

Monday morning. The shared mailbox is full of client documents. Someone has to open every one.

Client documents reach the right client, folder and accounting software by themselves; the team handles only the exceptions.

THE FLOW

1. **Receive and recognise**
   Automatic
2. **Title and file**
   Automatic
3. **Check and split**
   Colleague
4. **Send back to the client**
   Automatic

Blueprint BP-01	
SECTOR	Accountancy
PROCESS	Document intake
STARTS WITH	Client mailbox
RESULT	Bookkeeping
BUILDING BLOCKS	M-Files · Mail Importer · PowerPack

Retention

Recognise this moment?

Tell us about your own process. We look at it with you, without obligation.

DISCUSS THIS PROCESS
softadvice.eu
/plan-a-call

READ THE FULL BLUEPRINT
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