



Docupile

# *Essential Features to Look for in a DMS*

*Like Docupile and Hubdoc*



# Features to Look for in a Document Management Solution

Feature	Docupile	Hubdoc
<b>Cloud-Based Document Storage</b>	✔ Full cloud storage with encryption	✔ Cloud storage for financial documents
<b>Full-Text Search Capabilities</b>	✔ Advanced search with keywords, metadata, and file content	✘ No comprehensive full-text search; focuses on data extraction
<b>Security &amp; Compliance</b>	✔ 256-bit encryption, SOC 2, HIPAA, FINRA, GDPR compliance	✔ 256-bit encryption; focuses on financial data security
<b>AI-Powered Auto Sorting</b>	✔ Uses AI for automatic file categorization and sorting	✘ No AI-based sorting; designed primarily for document capture
<b>E-Signature Integration</b>	✔ Integrated e-signature capabilities with HelloSign	✘ No built-in e-signature functionality
<b>Customizable Folder Templates</b>	✔ Offers custom folder creation for various industries	✘ Limited to organizing financial documents only
<b>File Sharing</b>	✔ Secure file sharing via links, email, and fax	✔ Allows sharing of financial documents

**Backup & Disaster Recovery**

✔ Includes automatic cloud backups with recovery options

✘ No specific backup or disaster recovery features

**Document Scanning**

✔ Built-in OCR scanning for documents

✔ Captures and extracts data from receipts and bills

**Metadata & Tagging**

✔ Allows use of metadata templates for document classification

✘ Lacks comprehensive metadata tagging; focuses on data extraction

**IP Restriction**

✔ Restrict access based on IP addresses for enhanced security

✘ Not available

**Bot Recognition & CAPTCHA**

✔ Integrated CAPTCHA to prevent unauthorized bot access

✘ Not available

**Access Logs & Monitoring**

✔ Detailed access logs and monitoring for user activities

✘ No advanced monitoring or access log features

**Industry Focus**

✔ Multi-industry, including education, healthcare, finance

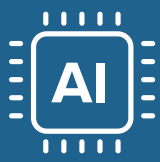
✔ Primarily designed for accounting and bookkeeping

**Support**

✔ 24/7 technical support available

✔ Support mainly for accountants and bookkeepers

# *Why Choose a Document Management Solution Like Docupile?*



## ***AI-Driven Efficiency:***

Docupile offers AI-powered sorting for various document types, whereas Hubdoc focuses primarily on financial document capture.



## ***Secure File Sharing:***

Facilitates secure document sharing through encrypted links and emails.



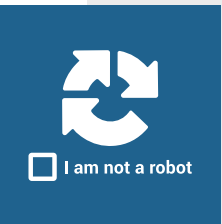
## ***Backup & Recovery:***

Ensures documents are backed up automatically and easily recoverable.



## ***IP Restriction:***

Enhances security by restricting access to certain IP addresses.



### ***Bot Recognition & CAPTCHA:***

Prevents unauthorized access from bots through CAPTCHA integration.



### ***Access Logs & Monitoring:***

Provides detailed activity logs for user activities, ensuring compliance and security.

Docupile

## ***The Challenge***

Businesses today generate massive amounts of documents that require efficient management. While some solutions cater to specific sectors like accounting, comprehensive tools are needed to handle diverse documents with enhanced security and compliance.

## ***Our Solution***

Docupile provides an AI-driven, secure document management system that handles diverse documentation needs. Features like automated sorting, full-text search, e-signature integration, IP restriction, and 24/7 support make Docupile versatile and robust for multiple industries.

## ***The Impact***

Implementing Docupile streamlines document management across industries, offering enhanced organization, compliance, and workflow efficiency. It provides secure, accessible document storage to meet the evolving needs of businesses.

# Testimonial



## **Strategic Financial Group**

*Implementing Docupile has been a key factor in enhancing our document management processes at Strategic Financial Group. The centralized system not only made it easier to manage and retrieve client documents but also ensured that we were always compliant with industry regulations. The robust security features give us peace of mind that our clients' sensitive information is well-protected. Docupile has truly streamlined our operations, allowing us to focus on what we do best—providing top-notch financial advice and services.*

**Vikesh Amin, Financial Professional**



***Ready to explore how a document management system can benefit your business?***

## **Book a Demo**

today to see how Docupile can transform your document workflows.

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