



Case Study

Success Story: Dean Rose

Sohodox Helps Dean Manage Personal Documents in a Professional Way

"Sohodox is the best document management software created for ease of use by providing a very powerful and flexible functionality. Highly recommended."

- Dean Rose

The advent of internet banking and online bill payments has simplified our personal financial lives to an extent. There is one catch, though. It does not eliminate the need to archive your bills and statements for future reference. The same goes for most other personal financial transactions and similar activities. Take the example of tax filing. Even though you file your income tax return every year, you still need to retain copies of all relevant documents as a personal record.

Managing hundreds of paper and electronic documents is a real challenge faced by not only businesses, but individuals too. So even if you simply love to pay your bills on time (!), you need a 'digital assistant' to manage your personal documents with ease. Dean Rose sensed this need while managing his online payments. Read on to find out how he got on top of all his documents...

The Challenge

"I'm very big on no physical, postal mail," says Dean. "So I save all my electricity, credit card and other bills and statements as PDF files on my computer's hard drive." Even though Dean was more organized than most people are, if he wanted to look for a particular expense item, he still had to navigate through the bill type, the year, the month and then open the bill and locate the item he was looking for - clearly a cumbersome process. "It was an antiquated way to find documents." The challenge was not for him - it was for the potential solution provider who could give him just what he needed.



The Solution

After searching for "document management software" on Google, Dean came up with a list from which he zeroed in on Sohodox document management software from ITAZ Technologies. He took a trial of Sohodox and viewed the demo videos and screenshots, and was soon convinced that Sohodox was what he needed. "The interaction in the videos showed how easy it was to use the product," says Dean. "I typically charge all my consumables to one credit card throughout the month. In fact, my credit card statement can run into 2-3 pages." Dean says the full text search feature enables him to find any item from any month - he can just type the vendor name in the search box and get a list. "Previously, I would have to search for the vendor in each PDF to find the particular purchase I was looking for."

"The informational videos showed Sohodox's functionality in real life scenarios."

The Outcome

What Sohodox has done for Dean Rose can be best described in one word: **Simplified**. When we asked him which 3 features he liked the most, Dean was quick to list them: "Search function; the ability to retain your folder structure while importing existing documents; and the folder monitor feature. I didn't think I would use it but now I use it a lot - to save email PDF attachments to a folder."

Well, Dean found Sohodox easy to buy and install. And given the fact that he has still not used some of the features Sohodox sports, you could expect him to derive even more from this indispensable document management software for small business that can be used even for managing your personal documents. So head over to the Sohodox **web site** and get started - **get your life simplified!**



More about Sohodox

Sohodox is a Windows based document management software for your small office. Using Sohodox you can quickly create a centralized, searchable database of all your documents. Add documents by dragging and dropping existing files and scanning paper documents. Sohodox works with any TWAIN compatible scanner. Save scanned documents as PDF, TIFF, JPEG, or PNG files. Re-arrange and add pages to PDF or TIFF files at any time. Sohodox features a modern MS Outlook style user interface that you are already familiar with.

Sohodox is a product of ITAZ Technologies Pvt. Ltd.

Let Dean Rose's success story replicate itself for your small office and you!

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About Dean Rose

Dean Rose works as Technical Project Manager at NICE Systems in the Dallas/Fort Worth area. Dean uses Sohodox to manage his personal documents.