DocMinder[®] **Simplifying Business Processes**

DocMinder is a versatile task management tool. You can manage projects with automated email follow-up and management oversight - All without technical assistance.

er									Hello, Chris	tina Thoma	as
	Home	New DocMinde	er Reports	Calendar	Dashboard	Procedures	Help				
			Your Pending	DocMind	ers (76)		Show Con	npleted			
	То		Subject			Due Date	Owner	ld#			
	🗸 Chris	stina Thomas	Document(s) - Chec	kliist		1/2/2018	Devin Hughey	68706			
	DM Chris	stina Thomas	Lease Agreement			1/2/2018	Mark Heaney	68707			
	DM Chris	stina Thomas	FINOP Examination			1/2/2018	Bruce Karlson	68708			
	DM Chris	stina Thomas	ABC Lease Agreem	ent		1/3/2018	Colby Craig	17484			
	🗸 Chris	stina Thomas	Document Request	Legal Hold		1/4/2018	Devin Hughey	68667			
	DM Chris	stina Thomas	Annual Review			2/28/2018	Colby Craig	20351			
	DM Chris	stina Thomas	ACME Corporation	of America		2/28/2018	Devin Hughey	20349			
	V Chris	stina Thomas	ACME M&A Transa	ction		3/1/2018	Mark Heaney	40251			
	V Chris	stina Thomas	Trial Preparation Fo	llow Up		3/8/2018	Bruce Karlson	49334			
	DM Chris	stina Thomas	ACME Agreement			3/16/2018	Colby Craig	44993			
	DM Chris	stina Thomas	CIP-003-3 R5.1.2			3/23/2018	Devin Hughey	14746			
	DM Chris	stina Thomas	Personnel Access			3/30/2018	Mark Heaney	14755			
	DM Chris	stina Thomas	FINRA (NYSE)			4/20/2018	Bruce Karlson	16173			
	DM Chris	stina Thomas	Personnel Authorize	d Access		4/25/2018	Colby Craig	20350			_
	DM Chris	stina Thomas	Follow Up America/	Johnson	1						
		121122 12 2									

Homepage

Homepage "To Do List" means less reliance on email. Includes both calendar and dashboard views.

AUDUST

Dashboard

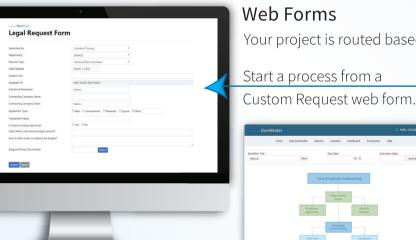
Dashboard shows your individual performance.

Create projects and view your team's progress within iManage Work10

	Documents Emails	Calendar		Ē		<∽		×			
ters Views ^	Word-Tech, Inc. (10)253) Word Tech Contracts	For This Client Show			⊖ All My Assig	O All My Assignments O Pe		Home Pending O Completed Soth		1 Folder Upload	
🕞 Latest Documents	Report 12 Calendar 12 Co	🚺 today 🔻	Oct, 2017				Day Week	Month Timeline			
🕞 Latest Emails	1 item	Sun 1 Oct	Mon 2	Tue 3	Wed 4	Thu 5	Fri	Sat 7		Pro	perties
	ACME Supply Agreement Manager and Alled, Inc. Real Estate Ca Deckfinder Upplaads Construction Construction FairPoint Real Estate Clor Construction State Clor Construction State Clor Construction State Clor Construction State Clor Construction State Clor	8 15 22 29	_	10 Non-Disclosure DevAgra Easmerit 17 Clent Notes 24 Non-Disclosure 31	18	12 19 ABC Company 26 Tech Contracts 2	13 Client Notes 20 27 3	14 21 28 4	P BK	ACME Supply A Location Expand to view lo Dwner BLK Bruce L. Ka Document Name Default Security Private	ocations ~
	1 - S of 5	Doc Minder ARC	>								Show Mor

Automatic Email Follow-Up Until Completion





Web Forms

Your project is routed based on your answers.

Management Tools

Reports Export to Excel for management or evidence for auditors.

		ld	То	Due Date	Subject	Message / Body	Completed By	Completed Date			
٥	M	31052	Bob Smith	8/3/2017	ABC Contract	Review contract	Bob Smith	8/3/2017			
	/	66377	Colby Criag	8/4/2017	Legal Request	Review new legal	Request	8/4/2017			
٥	M	38903	Colby Criag	8/31/2017	Compliance Request	Reporting complia	Jack Peters	8/31/2017			
٥	M	66578	Mark Heaney	8/31/2017	Leak Investigation	Test investigation	Mark Heaney	8/31/2017			
٥	M	66579	Mark Heaney	8/31/2017	Document Disposition	The document req	Bob Smith	8/31/2017			
٥	M	67894	Mark Heaney	10/31/2017	Lease Agreement	Please sign	Bob Smith	10/31/2017			
٥	M	66401	Bruce Karlson	12/6/2017	Compliance Request	Reporting complia					
	/	54414	Bruce Karlson	12/12/2017	Audit Findings	Please review					
٥	M	17484	Bob Smith	1/3/2018	Records Disposition	A new disposition					
B	1	61600	Bruce Karlson	1/24/2018	Legal Hold	Please confirm					
	H I 2 3 H Page size 10 21 items in 3 pages										

Calendar Filter calendar by topic (i.e., "All Legal Requests") to view more details.



Contract Search Form Search for existing contracts by client, type and more.

Contract S	earch Form		Us	er: Christ	tina Thoma
New Contract Reques					
Status:	Pending Completed Both				
Client:	100252 <acme america="" corporation="" of=""></acme>				
Type:	[Choose]	٣			
Assigned To:	Assigned User Name				
Territory:	Territory				
Department:	Department_				
	Effective Date Expiration Date				
After:					
Before:					
Search Reset					
Client	Description/Subject	Assigned To	Туре	Summary	Workflo
100252 <acme Corporation of Americ</acme 	ACME Real Estate Agreement	Mark Heaney	DOC	Summary	Workflo
100252 «ACME Corporation of Americ	Existing Contract Request for Allied Real Estate	Bruce Karlson	MEMO	Summary	
100252 <acme Corporation of Americ</acme 	Existing Contract ABC Company Contract Request	Colby Craig	MEMO	Summary	

Common DocMinder[®] Uses

- Contract, Governance-Risk-Compliance
- Legal Projects between Counter Parties
- Outside Counsel Cost Containment
- Fixed Fee Projects, Issue Tracking
- Document Mark Up and Approval
- Evidence Collection, Discovery
- Litigation, Docketing, Policy/Procedures
- Records Disposal Process Automation

• Legal Hold, Legal Request Management

Your process path automates email follow up.

- Onboarding New Clients/Vendors
- Audit Letter Management
- HR New Hire/Separation/Transfer
- Training Management
- State Mgmt., Audit Procedures
- Capital Expenditure Approval Process
- Recurring Operations, Accounting

Schedule your short web demo by calling our offices or email (216) 271-4800 www.BTOhio.com ecnno

COMMITMENT TO EXCELLENCE-EVERY DAY