

Information material for partners

How to sell TriDoc?



1. “What tools support me in selling TriDoc?”

1.1. Information material for partners

This information material you hold in your hands serves to provide you all the information you need to sell TriDoc Easy document management. Please read it carefully and keep it, so you can use it also later if you just to need look up something.

<http://tridoc.eu/en/downloads/sales-materials>

1.2. Sample product – included in First sales pack

Each First Sales pack sent to partners contains a sample product for partners. (This is a complete product with 5 user and 10 000 document licences.) Partners can use this product after they installed it for studying the main functions of the system.

1.3. Product brochures, flyers

Each sales pack we send to our partners contains 50 TriDoc flyers with a brochure holder. There is also a high quality product brochure (A4 format), which we recommend for personal selling purposes. These brochures are available on request (in a limited number). The brochures and flyers can be downloaded in PDF format from our website.

<http://tridoc.eu/en/downloads/sales-materials>

1.4. TriDoc Easy document management Roll-Up

POS materials promoting our products are also available for our partners. For partners who have a showroom ore a store we plan to send a Roll-Up after the first product is sold. The graphic source of the Roll-Up can be downloaded from our website, if partners would like to prepare one for themselves.

<http://tridoc.eu/en/downloads/sales-materials>

1.5. TriDoc product website

The TriDoc.eu product website contains all information about the TriDoc Easy document management product. The website is constantly expanding, with new contents, features we try to provide more detailed information for visitors and partners.

<http://tridoc.eu/>

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1.6. On-line demo

Learn the main functions of TriDoc Easy document management through our free online demo products you can find on our website. The demo versions are available in all supported language versions. (If we prepare a new language version the list of demo products will also be expanded.)

We recommend to use these online demos also for presentations (the other option is to use the sent sample product in demo mode).

Keep in mind, that only sample data can be seen in the on-line demo; searching within the database or saving changes is not possible, as there is no server connection. New entries cannot be recorded into the demo system!
<http://tridoc.eu/en/demo>

1.7. Demo videos for partners

With our demo videos for partners we would like to help our partners in understanding the product, and preparing a persuasive presentation. In the videos you can find some tips and tricks how you should demonstrate TriDoc functions, the possibilities of the used technology.

<http://tridoc.eu/en/download/sales-materials>

1.8. Video Guide for users

Video guides prepared for users mainly serve as tutorials, so they include important information for the every day use. Besides learning about the basic functions users can learn small tricks and workarounds.

<http://tridoc.eu/en/support/online-help/video-guide>

1.9. Recommended sales price

For each of our partners, should they come from anywhere in the world, we recommend a fix retail price. The price used by the partner can differ from this in both directions according to the market situation in the given country/region.

1.10. TriDoc pricing structure

This material includes all information about the pricing of the different TriDoc licences (standard licence, extended licence, Oracle and MsSQL licences etc.).

1.11. Individual prices - marketing

For marketing campaigns (individual or regional), initiated by Partners, we provide a pre-agreed further discount, which is valid for the campaign period. This discount remains unchanged for the duration of the campaigns.

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2. Target customers of TriDoc

“Which type of companies shall I recommend TriDoc?”

TriDoc standard targets mainly small and medium sized businesses, but with licence extensions you can also build up system of 150-200 users. TriDoc does not focus on special business areas, by using the customisation options every company can modify the system according their needs.

For corporate clients we recommend TriDoc enterprise licence solutions that are custom tailored within individual projects. In such cases please always contact our sales managers so they can support you in gaining the project.

3. “How to give a brief description of TriDoc?”

3.1. TriDoc in 1 sentence

TriDoc standard is a high-class document management software for small and medium businesses.

3.2. TriDoc in 3 sentences

TriDoc standard is a fully web based document management server application for small and medium businesses. The wide range of functionality satisfies all documentation needs of your company and due the numerous customisation options the system is able to adapt flexibly to the requirements of your enterprise. You can use the TriDoc system in the 10 incorporated languages, or you can create your own language version with ease.

3.3. TriDoc in 5 sentences

TriDoc standard is a fully web based document management server application for small and medium businesses. With the introduction of TriDoc Easy document management your company’s document filing and managing procedures become standardized. Effectiveness of document handling increases by the automation of your processes, and as a result, the amount of work can significantly be decreased. You can use the TriDoc system in the 10 incorporated languages, or you can create your own language version with ease. With the help of the numerous in-built customisation options (custom fields, customisable access roles and approval processes etc.) the system can be tailored to the companies specific needs.

4. “What are the main product benefits I should highlight?”

1. Fully web based server application
2. 10 incorporated language versions – custom language options
3. Numerous customisation opportunities
4. Wide range of functionality for all documentation needs
5. Quick deployment, ease of use

For detailed business benefits visit the product website.

<http://tridoc.eu/en/about/business-benefits>

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5. TriDoc functionality

The detailed functionality of the TriDoc system can be discovered by examining the Functions list. This list summarizes the product functions along different dimensions.

List of functions

Workflow

- Advanced approval workflows with arbitrary approvers and approval levels
- Simple approval workflow to manage fundamental processes
- Automatically triggered approval processes
- Approval process definition for document types and projects
- Automatic (timed) e-mail notification of the arrival of approval tasks
- Automatic (timed) e-mail notification of late approval tasks (user and supervisor as well)
- Individual approval task list
- Current approval tasks list on the Dashboard

Archiving

- Secure, database-based document archiving
- Specify document retention periods

E-mail notification, e-mail sending

- Automatic e-mail notification of the arrival of document preparation tasks
- Automatic e-mail notification of the arrival of approval tasks
- Automatic (timed) e-mail notification of late approval tasks (user and supervisor as well)
- Sending attached files of document versions by e-mail

Search

- Search for all meta data of the registered document
- Quick search
- Search for custom fields
- Search based on barcodes
- Search documents of logically deleted status

Access control

- Access control based on roles
- Data-level access control based on document categories - customizable
- Data-level access control based on projects - customizable
- Functional access control - customizable

Document meta data

- Using tags
- Attach notes to documents, document versions
- Approval notes
- Individual identification of documents using registration numbers
- Barcode identification
- Manage external ID's
- Link companies, persons to documents
- Link documents
- Place custom fields on datasheets, lists

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Logging, statistics

- Document history - User-related events
- Document history - Document category/type related events
- Document history - Project related events
- System log - User-related events
- System log - Data sheet related events
- Document statistics

Export/Import

- E-mail based group registration of documents
- Export of language database (xls, xml)
- Import of language database (xls, xml)
- Export of reports and screening results (xls)

Version control

- Checkin/checkout group work support
- Lock documents
- Document history
- Three level versioning

Dashboard

- Quick registration
- List of tasks assigned
- List of documents have to be prepared
- List of documents have to be approved
- Quick search
- Search based on barcodes
- Task assignment

Integration

- E-mail based fax and scanner integration
- Microsoft Word integration(2003, 2007)
- Microsoft Outlook integration (2003, 2007)
- Partner database integration based on xls
- E-mail integration

Business customisation

- 30 custom fields
- Core data customisation
- Language customisation with translation support
- Unique document types and categories
- Freely configurable access control
- Advanced approval workflows with arbitrary approvers and approval levels

<http://tridoc.eu/en/functions-list>

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6. Customisation – “What options do I have?”

TriDoc provides numerous in-built customisation options, which can be offered - if carried out properly - as value added services to the customers.

6.1. Create individual document types and categories

Create individual document types and categories in accordance with the companies requirements! Develop an integrated documentation system!

To create new document categories or modify the existing ones go to the Business customisation/Core data menu.

6.2. Customise core data

The content of the system's comboboxes can be modified or expanded at will.

Examples of core data types you can customise:

- Document categories
- Document types
- Registry Books
- Registries
- Company categories
- Company profiles etc.

Before using TriDoc for the first time it is worth checking over the Core data, and possibly modifying them so they correspond the company's operational procedures as well as possible.

6.3. Customise fields

Customise our document management software in accordance with the company's requirements. With the aid of TriDoc's freely definable fields, you have the opportunity to create new textual, numerical or date fields to help optimise the unique document management system.

With the TriDoc system, you can define up to 30 completely individual fields!

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6.4. Define approval workflows

Define individual approval processes for your various document types! Enter which colleagues have to approve the given document types and in which order.

The approval route can be in parallel or in series, or a combination of these, where it can be entered separately in the parallel branches that every person responsible must approve the document.

A deadline can be assigned to the given workflow, on the expiry of which an automatic warning is generated for the previously entered person and for his superior.

NEW advanced approval workflow for the creation of complex, multilevel approval processes
To define, modify or delete approval processes go to the Document management/Approval processes menu.

6.5. Access control

Simply determine who can perform what operations on which documents with the help of the incorporated authorisation management module. The authorisations may be determined on the basis of access roles. With the help of category authorisations, the type of access possessed by various users can be determined in connection with documents associated with each document category.

The other form of data level authorisation is when the accessibility to documents associated with projects is made dependent on access roles.

Both data level and function authorization can be customised at the Administration main menu.

6.6. Own language version

Use the TriDoc system in the ten predefined languages found in the box, or produce your own language version. For each user, you can set up the language he wishes to use the system in.

In addition to the 10 languages of our product you may create also further custom languages. You can create a custom language by modifying one of the default languages, or simply by creating even a new language file. You can translate the product labels through an ergonomic, easy-to-use customized translation function. Just immediately after translation you can look at the result and use it in the system.

Due to the translation support function those colleagues responsible for translation can easily search for one or the other label being eg. not yet translated, or they may use the so-called control language to facilitate proper translation, and they be warned if the number of characters of one or the other translation exceeds the optimum and maximum number of characters.

Certainly, the language files may also be exported to enable translation in other external applications. Once the translation is ready it can easily be reimported into the TriDoc system.

<http://tridoc.eu/en/downloads/sales-materials>

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7. Presentation of TriDoc – “How to make a persuasive presentation?”

7.1. Use the online demo products!

Why we do not suggest to use live system for a demonstration?

- Using a live system is always risky! You cannot be sure about unexpected things to happen. (e.g. a simple error messages can be very confusing in front of your audience)
- We have uploaded the demo system with diverse demo data! Live systems have to be first filled in with data.
- If more users use the same live system, changes made by one of your colleagues can cause you unpleasant surprises during your presentation.

Demo versions in all languages can be found at: <http://tridoc.eu/en/demo>

7.2. Use the demo mode of your installed TriDoc product if you have no (or a slow) internet connection!

If you are not sure if there is a fast and working internet connection at the place where the presentation will take place use the demo mode of your installed TriDoc product. Each installed TriDoc can be used in demo mode. This demo is the same as you can find at our website, but you need no internet connection to use it.

7.3. Practice before you go to the customer!

Take time to learn the demo! It is not so easy like it sounds. You have to be aware of the functions not working in demo mode to provide a confident presentation.

7.4. Prepare yourself for the customers potential needs and problems!

Every company has different notions about documentation at a company, but there are some sector-specific perceptions. Collect some of these and integrate them into your presentation. (Show how TriDoc supports the realization of these notions.)

7.5. Load the system before you start the presentation!

The first loading of the screens can take a few seconds, after they are once loaded they can be displayed very fast. If speed is important for the customer load the screens before you start the system. (To load all screens takes only a minute.)

7.6. Do not show every screen and every function!

TriDoc has a very wide functionality, to show all functions takes longer than it would be optimal for a first presentation. Try to show functions which are more interesting for your audience. After you finished your first thoughts, which serve to demonstrate that you are well prepared, let them lead you by asking you questions.

7.7. Highlight customisation opportunities!

By emphasizing customisation options with using relevant examples you can easily demonstrate how the system can be formed according to the customers needs.

7.8. Be not afraid to say: I don't know!

As a sales representative you cannot study the system from alpha to omega. There will be questions you will not be able to answer. So do not be ashamed to say you don't know.

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8. “How can I reason if potential customers ask for the differences between other document management products and TriDoc?”

Our main goal was to develop a product for small and medium sized businesses, which can concur with the leading document management system available on the international market, but we also tried to enhance our product with additional functions and features to gain a market advantage.

- TriDoc standard includes 10 predefined language versions with the opportunity to create additional own language versions!
- TriDoc provides numerous in-built customisation options (custom fields, customisable core data, approval processes and access roles etc.)
- TriDoc is a multi platform server application, it runs on Windows, Linux and Macintosh!
- TriDoc standard comes with a MySQL database, but MsSQL and Oracle based versions are also available
- TriDoc is a fully web based server application, which was developed with RIA technology.

9. Why should your customer implement a document management system?

- With the introduction of TriDoc Easy document management system your company's document filing and managing procedures become standardized.
- Effectiveness of document handling increases by the automation of your processes, and as a result, the amount of work (especially time spent with searching for documents) can significantly be decreased.
- Company documents can be accessed and managed by employees, who have the appropriate rights, via intra-or Internet, from anywhere and any time.
- The companies documents and the associated information is stored in the database of the TriDoc system in a secure and traceable form, so the risk of data loss is minimized.
- You can track documents within the group/company/department at any single point of time.
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10. “What TriDoc references can I mention?”

Most important Hungarian TriDoc references:

- TV2 - 2nd biggest Hungarian commercial television – member of the ProSiebenSat.1 Media AG
- RTL Klub – biggest Hungarian commercial television – member of the RTL Interactive GmbH
- Hungarian Ministry of Economics
- Arcadom Construction Co.
- Szent István University

International TriDoc standard product references:

- Artemis Joint Undertaking

11. “Who can I contact if I have questions in connection with selling TriDoc?”

Should you have any questions about the product, or about the TriDoc Global Partner Network please contact our marketing manager Ms. Diana Wagner using the contact details below:

E-mail: tridoc@trilobita.hu

Skype: [tridoc_standard](#)

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