

MACROS eWORKPLACE

Macros eWorkplace is the ECM suite for procedure and processing without media breaks: every step of the procedure cycle - from the first customer contact to the response - is completely digital and integrated.

eWORKPLACE AT A GLANCE

Macros eWorkplace is used for efficiently processing in standardised procedures - from the inbox to the outbox. The electronic inbox contains all the processes, orders and messages for which you are responsible, as well as the follow-up items.

One click takes you to the electronic file. You can see all decision-relevant information about a customer or a contract, bundled together from various systems into one view.

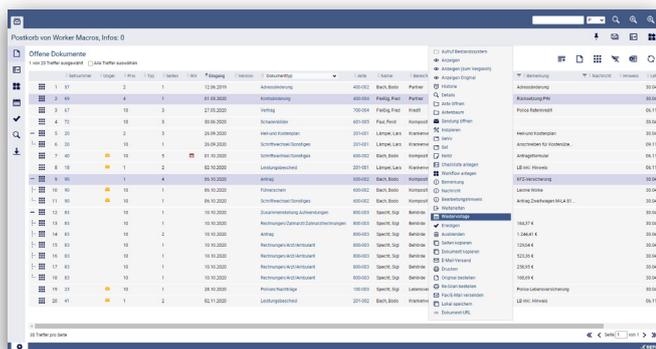
Thanks to the integration, Macros eWorkplace enables the context-related jump to your department systems. Naturally, all common Office, e-mail and host systems are also seamlessly connected.

As a cockpit for procedural and department processing, Macros eWorkplace provides a

360-degree view of the customer, which is reflected by considerably improved customer service.

MAROS eWORKPLACE MEANS:

- Efficient processing of incoming documents
- Automatic, intelligent distribution to individual or group mailboxes
- Overview of all procedures, messages, documents and appointments in the electronic mailbox
- Direct jump to the electronic file and other programs: 360-degree view of all information relevant to the context and its processing
- Short processing times: optimum customer service
- Adaptors to all common archive/storage systems, Office and e-mail systems, specialist applications, core systems, etc.



Macros Reply is practically the only manufacturer to make it its business to support the entire process from incoming through to outgoing mail by means of Macros eWorkplace. This “closed loop” approach optimises all stages of your customer communication and process processing.

INPUT MANAGEMENT

Any documents which are not yet electronically available are digitized via own Document Management Center or a scan service provider. In the next stage, the most important information must be extracted: the documents are classified and indexed.

Modern OCR/ICR solutions with integrated AI ensure an automated classification of incoming procedures and extraction of all relevant data for subsequent processing. In the best case, the business transactions can be processed fully automatically („dark“). Otherwise, the data can be used for a „light“ pre-population of the core system dialogs. Macros Reply relies on the leading solution smart FIX from the manufacturer Insiders Technologies for this purpose.

DISTRIBUTION

The digitized, tagged documents are now ready to be sent to the right employee. With Macros eDistribute, the departments or divisions independently determine how, when

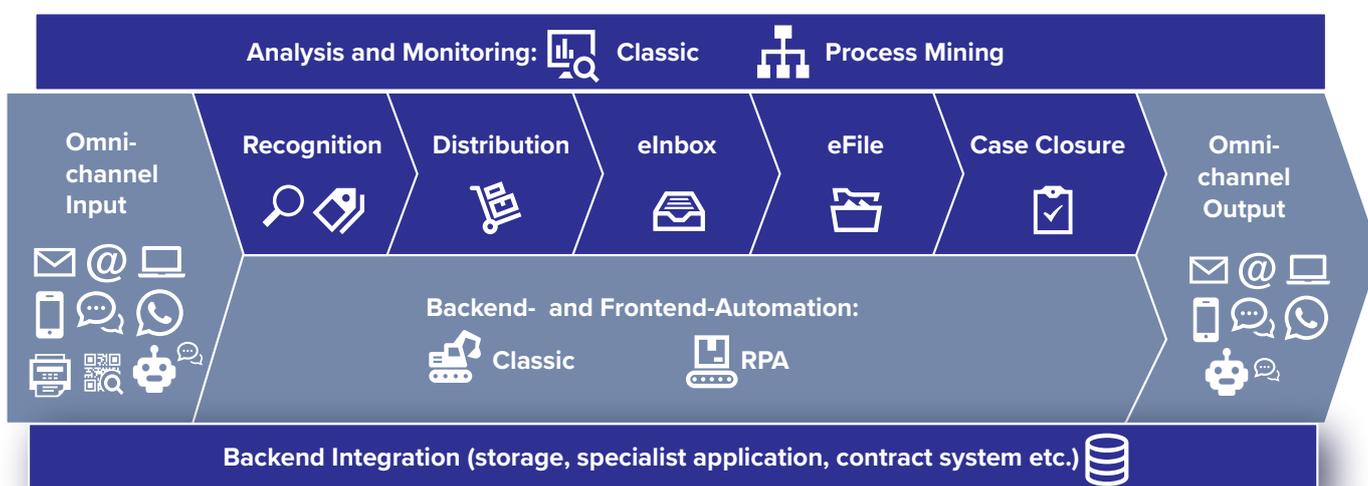
and according to which criteria the documents are automatically distributed to team or individual mailboxes. The department itself defines and administers its distribution rules and criteria.

The information extracted from the documents is used in the distribution to the same extent as the data pertaining to the employee (department, skill level, working hours, holidays, etc.).

PROCESSING - eINBOX & eFILE

Macros eINBOX

The employee can see, at a glance, the incoming documents, follow-up items and tasks bundled into one in the Macros elnbox. This is where the information from all relevant incoming channels and systems come together – including messages and data from inventory and specialist systems. The inboxes are structured according to the company and process organisation. Topic, procedure, group or employee inboxes are configured to best meet the requirements of the department.



The hub is the inbox – the basis for further processing: Should the procedure be approved, released, rejected, forwarded or edited?

Or is it sufficient to store it in the file? In order to reach this decision, the employee must get a full overview of the transaction, the customer or, generally, of the peripheral conditions – preferably quickly and easily.

Macros eFILE

This is exactly what Macros eFile was to provide the employee with all the information necessary for processing the transaction in one place – from input channels, data already stored in the file and information from inventory and specialist systems.

The file design follows the proven file structure. The file cover displays all the

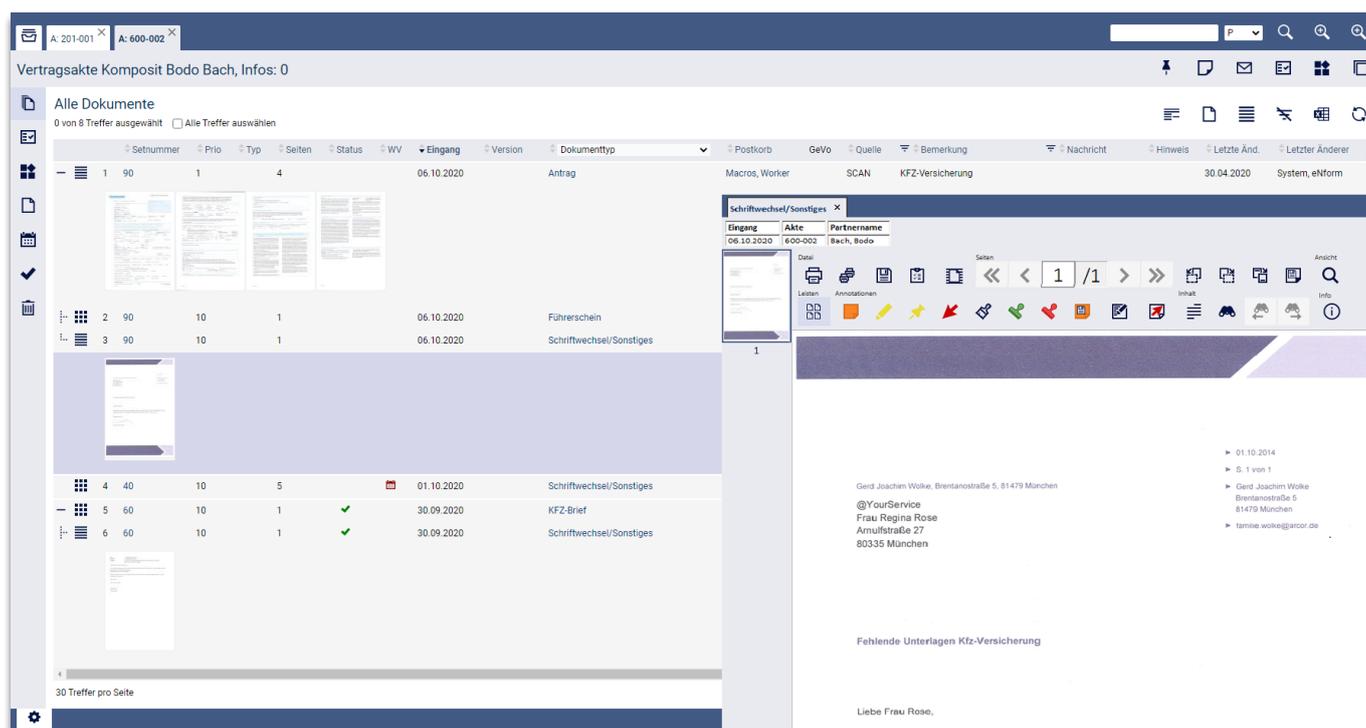
necessary, main information. At the same time documents, open transactions and to-dos belonging to the file are displayed.

With Macros eViewer, the incoming documents can be checked and, if necessary, edited with annotations. If it is an original document, it can be opened in the original application (e.g. Word) and edited if necessary.

THE IDEAL COMBINATION: MACROS eWORKPLACE

Parallel processing of several business transactions:

With the file tab technology, the inbox and several files can be opened parallel in one interface. This gives the employee the chance to process a transaction file, a customer file and the mailbox at the same time. Ad-hoc inquiries can be processed



The screenshot displays the Macros eWORKPLACE interface. At the top, there are two tabs for document sets: 'A: 201-001' and 'A: 600-002'. Below this, the main window is titled 'Vertragsakte Komposit Bodo Bach, Infos: 0'. The interface is divided into several sections:

- Alle Dokumente:** A list of documents with columns for Setnummer, Prio, Typ, Seiten, Status, WV, Eingang, Version, and Dokumenttyp. The list shows 8 documents, with the first three selected.

Setnummer	Prio	Typ	Seiten	Status	WV	Eingang	Version	Dokumenttyp
1	90	1	4			06.10.2020		Antrag
2	90	10	1			06.10.2020		Führerschein
3	90	10	1			06.10.2020		Schriftwechsel/Sonstiges
4	40	10	5			01.10.2020		Schriftwechsel/Sonstiges
5	60	10	1	✓		30.09.2020		Kfz-Brief
6	60	10	1	✓		30.09.2020		Schriftwechsel/Sonstiges
- Document Viewer:** A detailed view of a document titled 'Schriftwechsel/Sonstiges' with 'Eingang' date '06.10.2020' and 'Partnername' 'Bach, Bodo'. It includes a toolbar with various editing and navigation tools.
- Document Content:** The main area shows the content of the selected document, including a header with contact information for Gerd Joachim Wolke and a body of text mentioning 'Fehlende Unterlagen Kfz-Versicherung'.

without cancelling or exiting the current business transaction. The improved working situation contributes greatly to productivity.

Shorter processing times for customer inquiries:

Relevant data are displayed in seconds – in the mailbox as well as in the corresponding files. You can see at a glance all communication with the customer, including all accompanying documents, and can provide precise, detailed replies to inquiries. Breaks in media are avoided and work productivity increased considerably.

Simple processing:

Due to the variety of file and document functions, the processing of transactions is made considerably easier. Follow-up items, checklists and forwarded items simplify collaboration between employees and/or departments.

Improved service quality:

Internal processes are optimally supported by Macros eWorkflow and eChecklist. The employee specifies for a task by when and by whom it is to be completed, as well as the type of task. In addition, checklists can be generated for a wide range of topics, making

processes even more efficient. Processes that have been carried out become transparent and measurable.

OUTPUT MANAGEMENT

If further correspondence with the customer is required, the employee can send letters, faxes and e-mails straight from the mailbox or file. To complement this individual correspondence which is possible within Macros eWorkplace, Macros Reply offers a further instrument:

Through integration with modern text & output management, individual and mass correspondence can be sent automatically or manually via various channels. With just one template per business case, the information is sent to the customer via letter, email, social media, etc.

Flexibly combinable text and layout modules, and organisation using templates, make communication simple, consistent and customer-oriented. The result of the correspondence is documented in the customer's file, and the employee has it at their fingertips for future contact with the customer.