nimbus®
PORTAL SOLUTIONS

Nimbus Professional

Product Features eBook

www.nimbusportals.com

Table of Contents

Overview

Nimbus Professional including Cloud Document Management (CDM) is the central hub for a suite of components, as illustrated below:

The **Client Workspace** fills the role of the client portal, so each of your individual clients has their own workspace behind a login username and password.

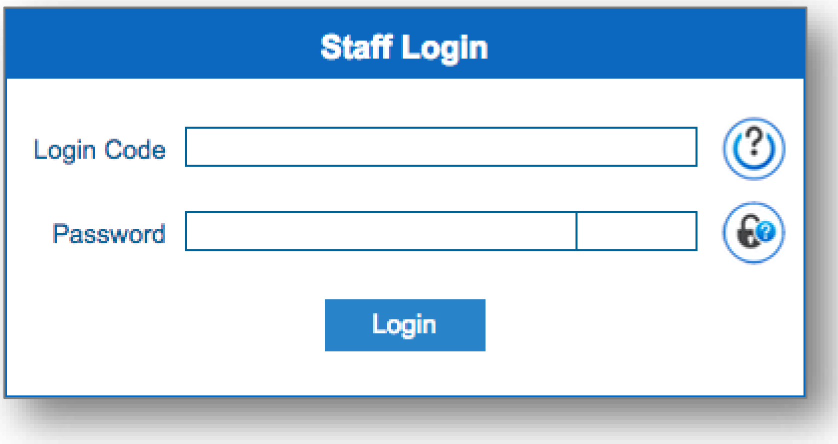
Combined with that is **Digital Document Signing** which enables you and your clients to sign documents anywhere, anytime, and from any smart web-enabled device. We built this to be fast and easy.

Central to all of this is our **Cloud Document Management (CDM)** system which is at the core of all the Nimbus functionality.

This eBook outlines the key features for Nimbus, matching them to your business processes.

Client Workspace

The **Client Workspace** is the client portal that can branded to match your firm's web presence. So, you can have a login gateway on your website or a unique URL, which the client accesses with a username and password.



Once logged in, the client will have access to his workspace and documents. The **brandable elements** of the Client Workspace for your business are illustrated in the highlighted sections below.

Database Integration

It is essential for you to understand that Nimbus is not adding an extra client contact database, however, it could serve as a stand-alone CRM database should you not have an existing CRM system.

By **integrating with your existing CRM / Practice Management system**, Nimbus shares necessary client contact fields together with custom fields as required, which means you only maintain **one master database**.

Nimbus integrates with the following major software integration Partners you may already be familiar with:

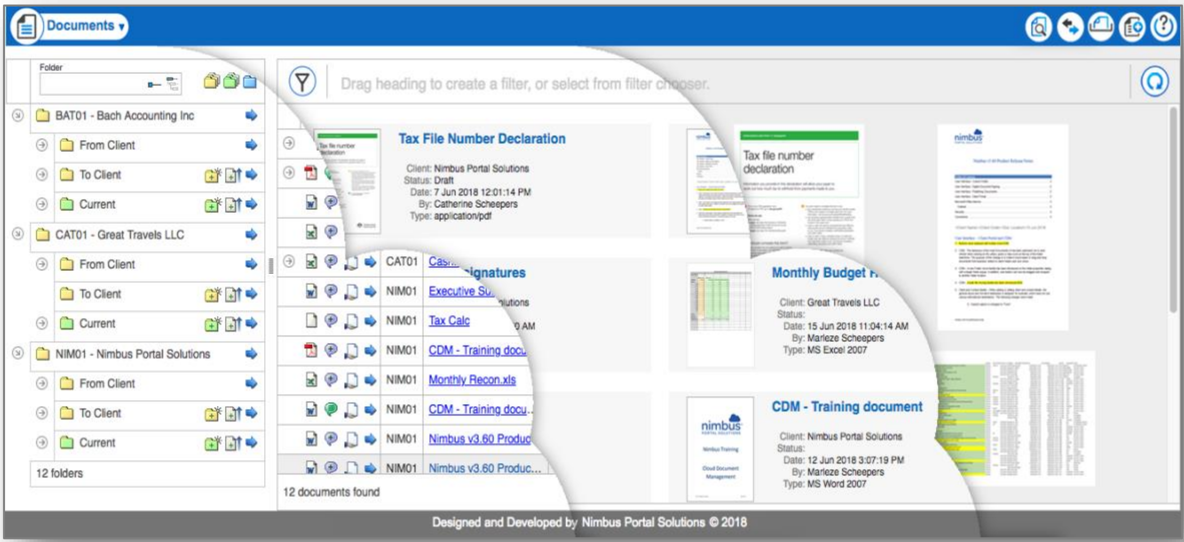
Cloud Document Management

Nimbus CDM is a cost-effective state-of-the-art Cloud DM system.
It offers all the facilities that you would expect to find in a modern Document Management system including: dynamic views, document templates, workflow support, full text indexing, filtering, sorting and one-click publishing. All of this has been implemented over a fully versioned file system with automatic archiving. Some of these features are highlighted below.

Flexible User Interface (Custom Views)

One great feature of Nimbus Professional is that everyone can choose to have their own unique way of looking at information.

We have a number of different views - **Grid**, **Gallery** or **Thumbnail**.

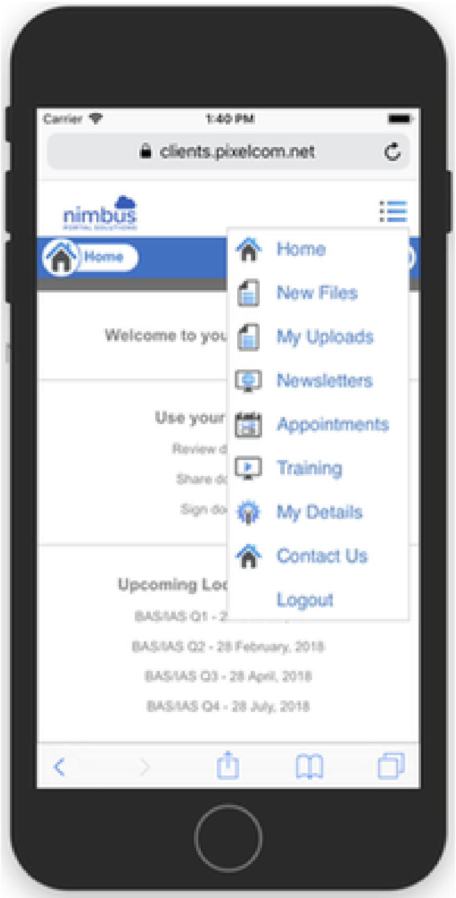


Further to this, **custom views** can be set up, saved and shared across your team.

Client Portal in the Palm of your Hand

When looking at Nimbus on your **mobile or handheld device**, navigation is quick and easy.

No app installation is needed. Simply browse to your Nimbus portal and login. Use the drop-down menu to navigate and view your files.



Document Templates

Document Creation from Templates is core to Nimbus Professional. You can create documents from pre-defined templates, which are saved in your business folders.

The images below show some examples of document templates saved in Nimbus. This can be in MS Word or Excel.

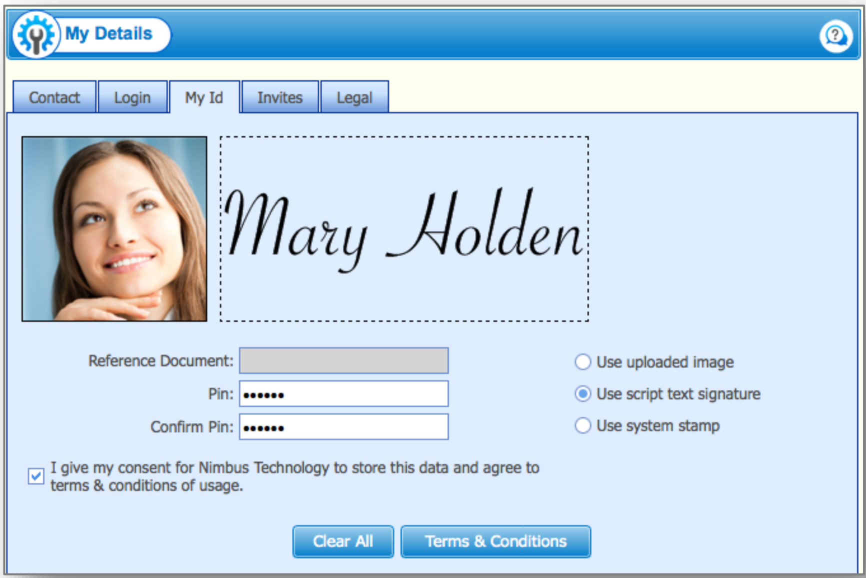
When you start using Nimbus, you can upload your existing document templates. So, if you have a personalised library of templates that you already use in Microsoft Word, you can easily import them.

You can also add in **merge fields** for personalisation, making this a huge time-saver when creating personalised documents, as it uses the information stored in your CRM system to populate these fields.

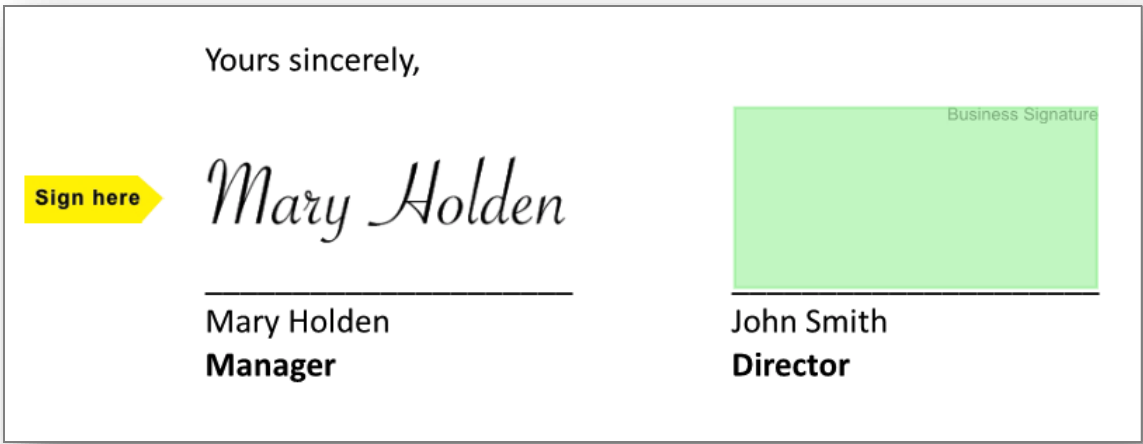
PDF Conversion & Digital Signatures

A simple yet powerful feature is the ability to **save a Word document directly to PDF**, and then **digitally signing** that document.

Setting up your digital signature in Nimbus is easy, and is also protected with your unique pin code:



Once your signature is set up, your PDF documents can be signed:

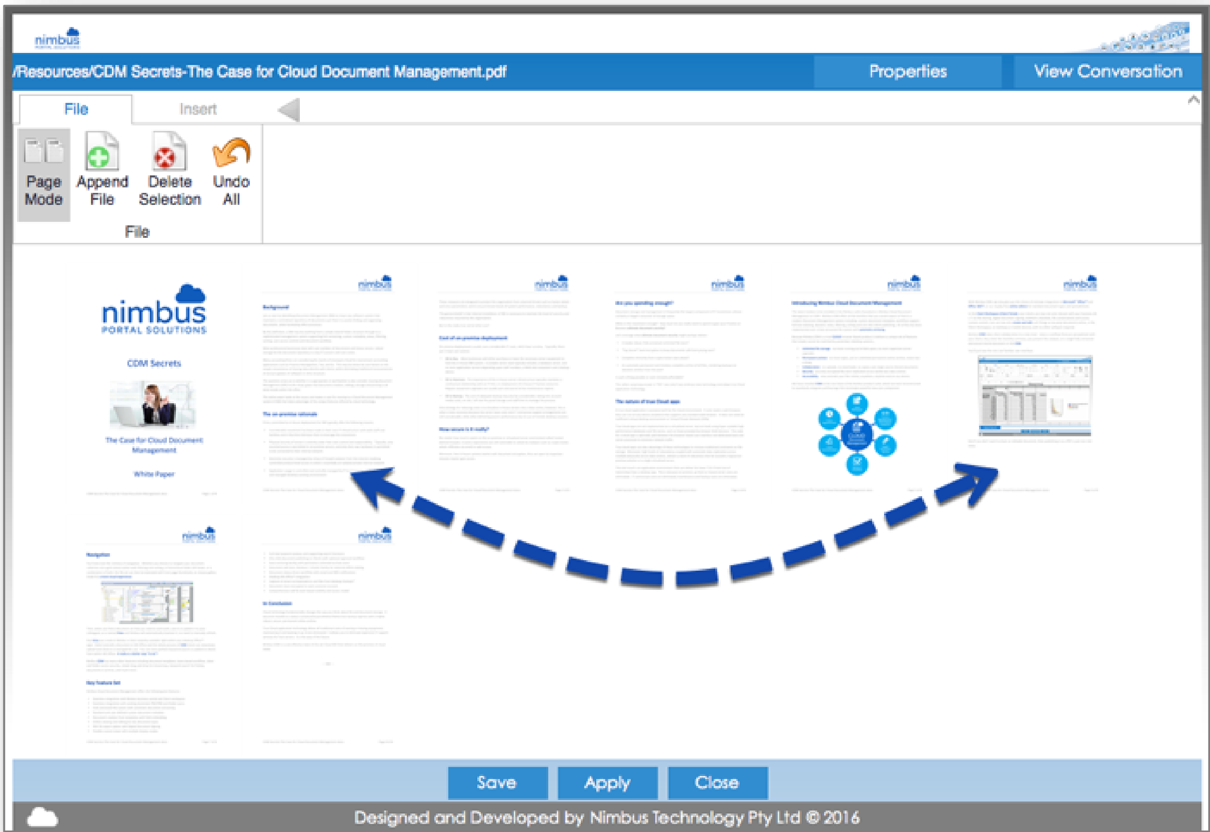


Once a document has been signed it cannot be changed, but it can be signed by other people.
For example, a junior staff member with their personal authorisation level can create a document, save and convert it to a PDF and then sign it. They may want to publish it but are not authorised to do so. In

this case it will send a notification with a secure link to a senior member of staff, who then reviews the document and approves it. This is one of the smooth workflow processes that are supported within Nimbus.

PDF Manipulation

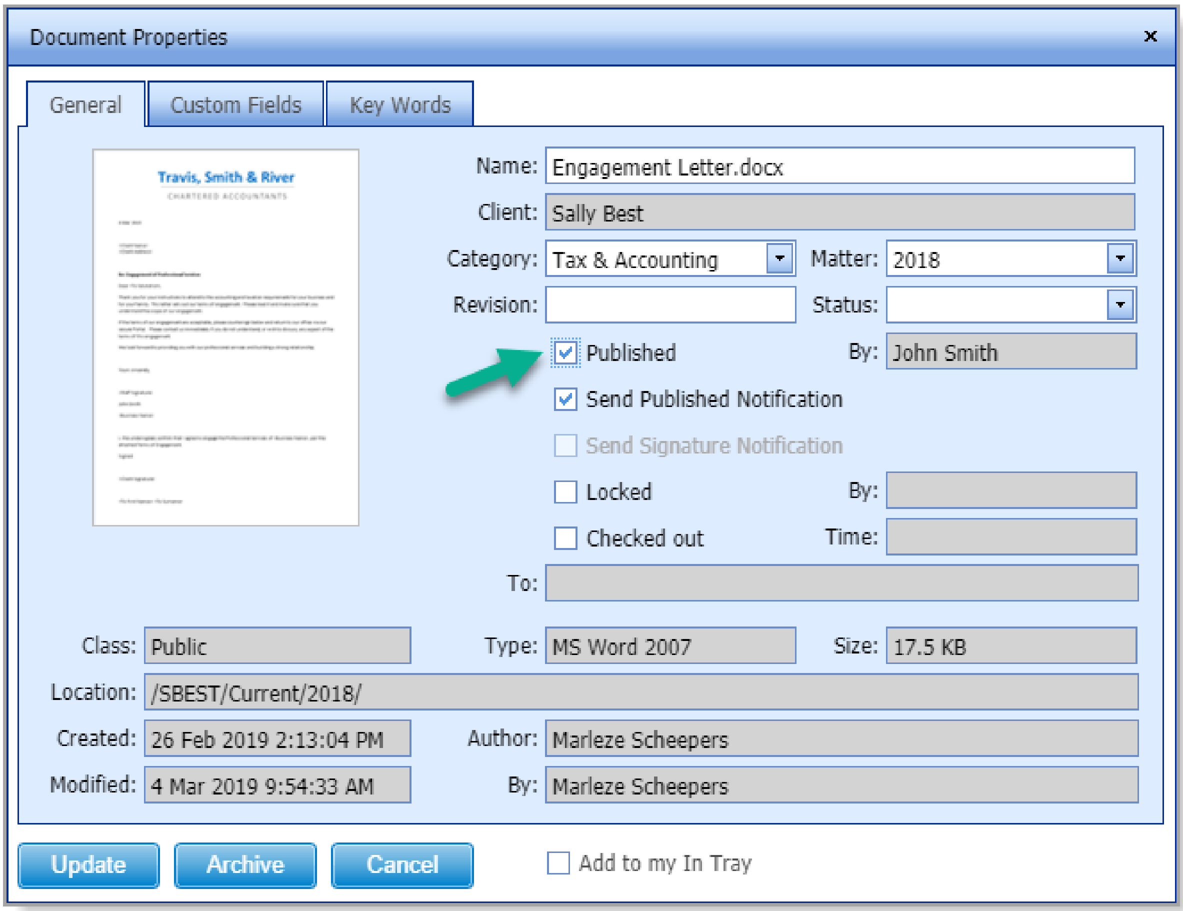
Businesses often have a multitude of PDF documents to be collated and presented to a client. You may find yourself re-using bits and pieces from one place and another. With Nimbus, you can simply **reorder the pages** and **append pages** from different files.



One-Click Document Publishing

There are several ways to publish documents in Nimbus. As you can see from this image of the document properties, **the document can be published with one click**, making it immediately available for the client to view.

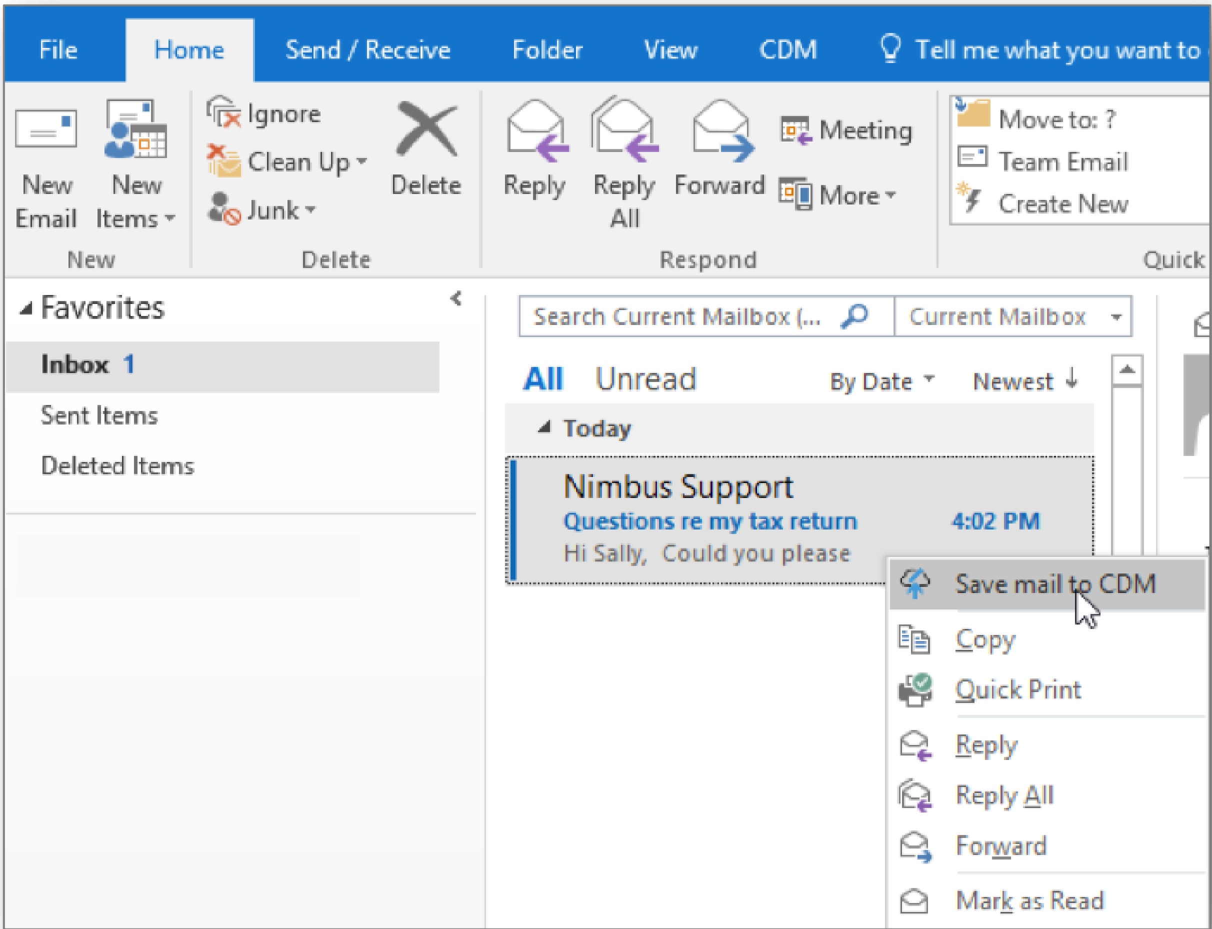
Once the document is published, the client will receive an email alert with a secure link to the document.



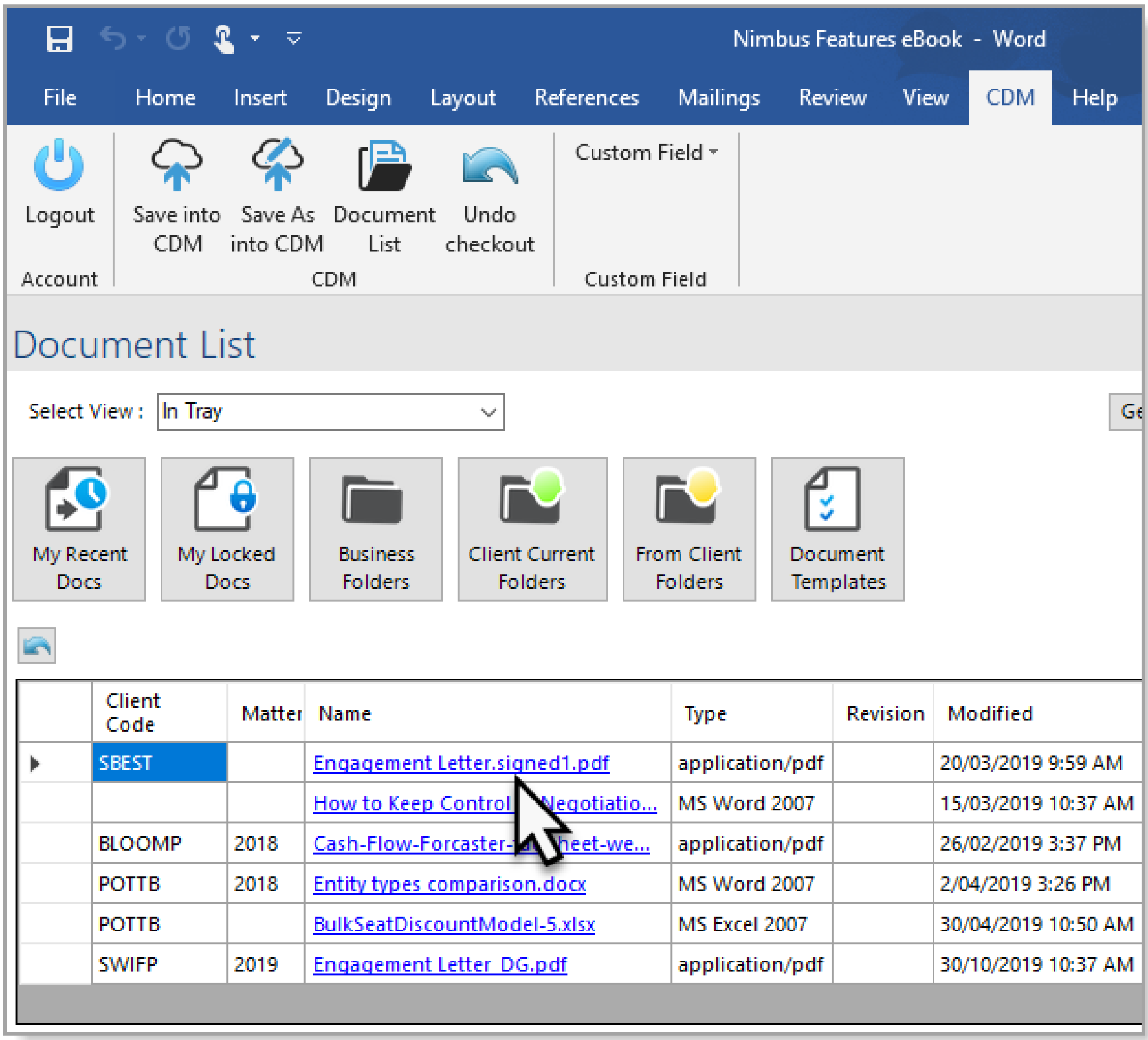
Microsoft Office Add-Ins

Within Microsoft Office, while communicating with clients using email, there will be a time when you need to save information from the email for your records. So, using the **MS Office Add-in** for this purpose is a smart, time-saving device.

By right-clicking on the email, a pop-up will appear reading, "Hey! This is Client MegaCorp, contact "John Smith". Would you like to save that?" And you can also apply any custom metadata from the document, to that email as you are saving it.



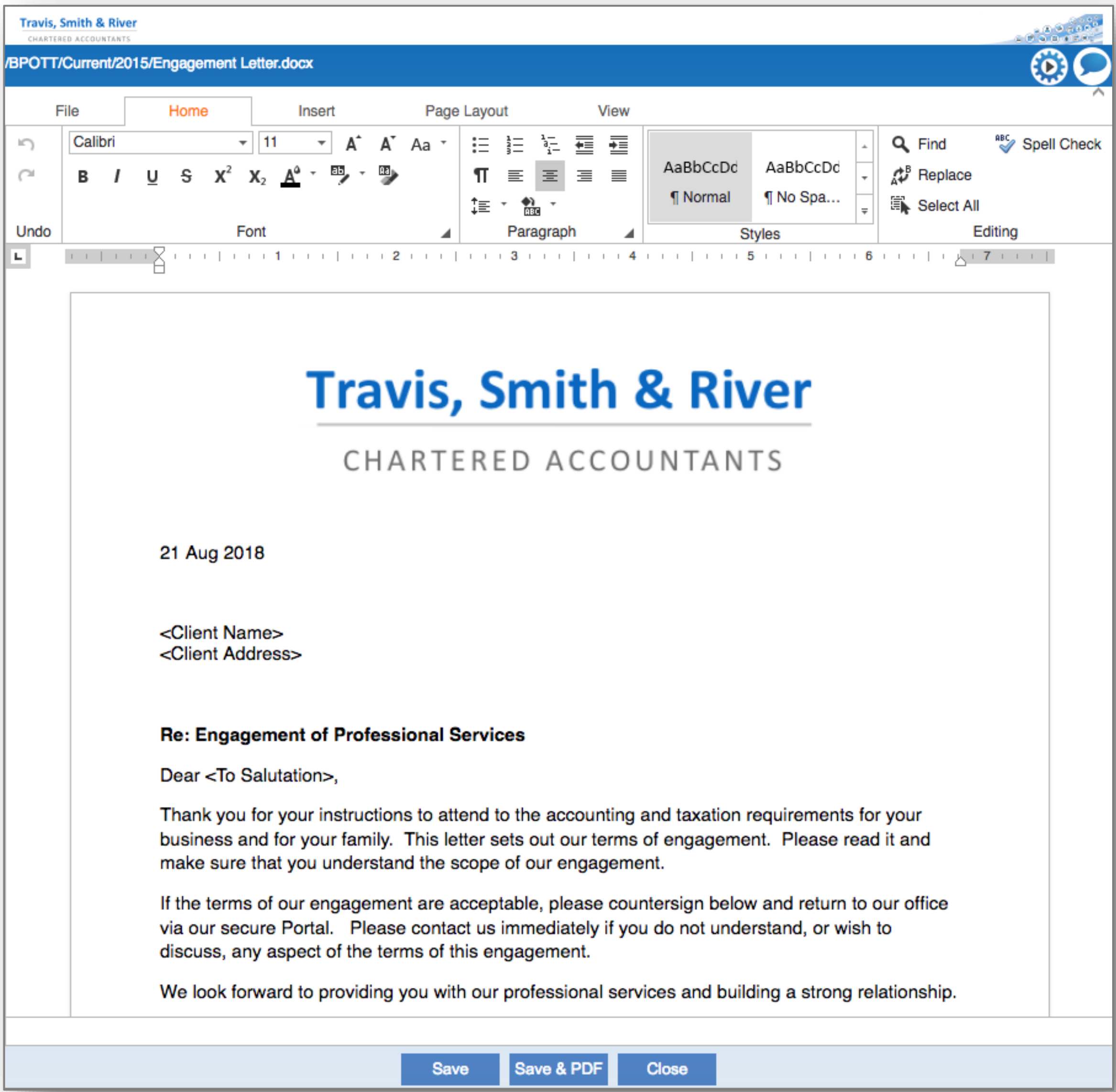
You can work in **MS Word, Excel or PowerPoint** from your normal Microsoft Office desktop, or Office 365. If you retrieve a document in MS Word from the Nimbus cloud, it will check it out of Nimbus CDM at the same time. This means that it can be viewed by other team members but they are unable to edit it, because you are editing it.



Online Document Editing

In addition to the Microsoft Office Add-ins we have **Online Editing** for documents. Usually, you will have a set of semi-standardised templates, ready to be customised for a client.

Previously you would have to manually edit the document back at the office. Now, with online editing, you can create documents from scratch within Nimbus Professional and edit them as well.



Imagine being able to reach into your Nimbus cloud, grabbing the template, making minor changes in front of the client and republishing it - enabling the them to access and sign it off on the spot!

User-Defined Metadata

Within any industry, there is a common industry-specific language, that may cross over with other industries. If an accountant was to search in your current document management system for the word “assessment,” it might reveal thousands of hits, but not all of them relevant to your exact reference.

And so, inside Nimbus we created the option for **user-defined document metadata**.

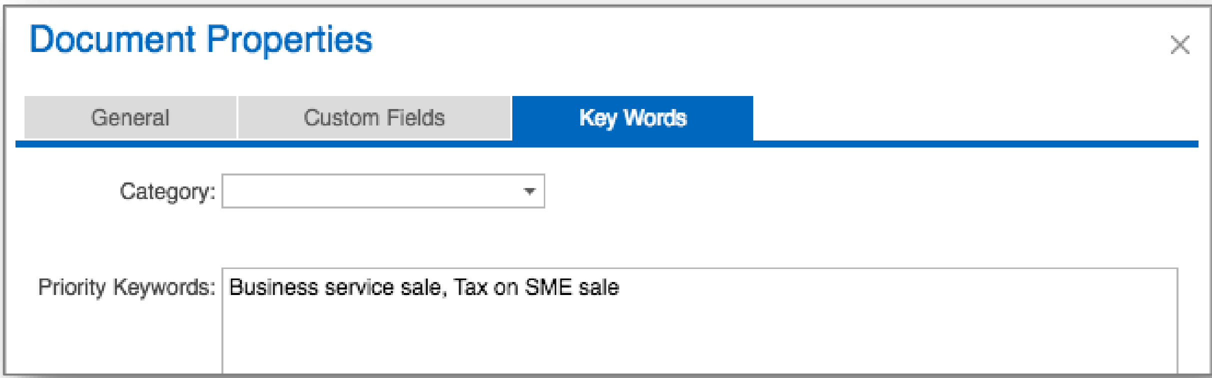
We have incorporated all of the standard metadata such as:

- The user who created the document;
- The date and time it was saved;
- Where it is located;
- Who the client is;
- What the matter is

Now you can add you own user-defined data as well.

Say for instance you are working with a client who has a medium-sized service business which they are preparing to sell. There will be a whole heap of conversation and some documentation around that transaction. You may be assisting them with the sales process, and so, you attach various tags (metadata) such as “service business sale” to the documents. When a similar transaction arises, it will be searchable across teams.

If someone now searches for “service business sale,” all your tags will display in the search results, including from archived files.



Keyword Analysis & Search

In Nimbus, **every** word of **every** document – including PDFs and TIFF files – are **fully indexed** to enable searches.

Keyword search and analysis is not a standard feature in many other document management systems. A lot of firms use a “document store” as opposed to a fully featured document management system. There is a big difference between these two.

This process happens automatically in the background when the document is uploaded or created in Nimbus.

As a result, you can conduct powerful searches across the entire database, or just look at a specific client and search within their documents.

Document Store & Auto-Archiving

Auto-archiving is tremendously important. Some of the larger document management systems offer archiving as an add-on. However, with Nimbus CDM we have auto-archiving built in at the base price.

You can decide how far back in time you would like to go. For example, some users choose to archive any documents older than 60 months – that's five years.

If none of the documents in a folder have been opened in the last 60 months, it will be archived. This means the folder is no longer available in the current area, but you will have nominated administrators in your firm who have access to the archive store to retrieve those documents.

N.B. It's important that you know – Nothing gets deleted!

Nimbus has a **fully versioned file system** and provides **unlimited document storage**, which is called "impermanent" archiving.

Staff & Team-Based Folder Security

Inside Nimbus Professional, we're able to **restrict certain clients** or **staff to access individual entities**. You can nominate which team members can have access to each entity, which can be based on an individual person, or on a whole team.

Another benefit is that you are able to give access to auditors across the board, or only to limited folders.

For example, you can create a folder with all the documents required for an auditor to audit a superfund, without giving them transparency over your entire database or even all the records for that particular client.

Staff & Team Workflow

Workflow is very important in any business. In the earlier example on PDF conversion and digital signatures, we showed how a prepared document triggered a notification to a senior team member to sign and publish.

Nimbus can support whichever workflow you wish to have, across multiple teams.

The four stages in document preparation and publishing can be illustrated as follows:

You can choose to have an **individual person** with a series of workflow steps, or you can **group them into teams**. Each workflow can be set up to trigger a notification.

One of the Accounting firm case studies we can demonstrate is Partners signing Electronic Lodgement Declarations (ELDs). When the

ELD is signed by the client, it comes back to the firm and pops up as a notification to the Partner. Only 3 clicks and it's countersigned! They can then further route the notification to the lodgement person to commence online lodging.

Smart Webform Checklists

The Webform Checklist is another value-added feature to Nimbus. This offers the ability to manage external workflow. As an example, you can set up activities scheduled throughout the year using a crafted checklist that can apply to a group of clients. Additionally, it can be customised down to an individual client, asking relevant questions and collecting information, data, documents - anything in electronic form.


Travis, Smith & River
CHARTERED ACCOUNTANTS

Best Practice Solutions (NSW)

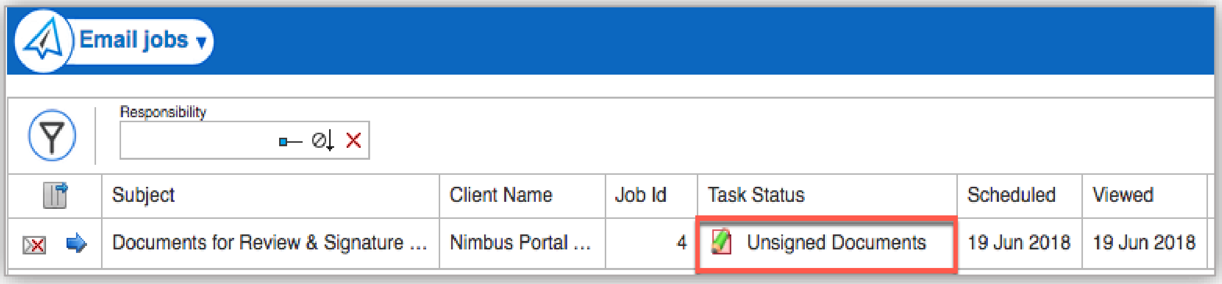
Fringe Benefits Tax - Self-Assessment Questionnaire

During the year from 1st April 2017 to 31st March 2019, did your business:

	Yes	No	Not sure
1 Own a motor vehicle used by an employee for private purposes?	●	○	○
2 Pay for car parking for employees?	●	○	○
3 Help an employee with housing or accommodation costs?	○	●	○

Other benefits of the webform checklist process is that you no longer send out emails and hope and pray clients send it back. Nimbus will automatically **send follow up emails** at the intervals that you specify.

Email tracking can also be done. Nimbus makes it easy to track your this in your online dashboard, giving an accurate status of whether a document has been received, viewed, or signed.



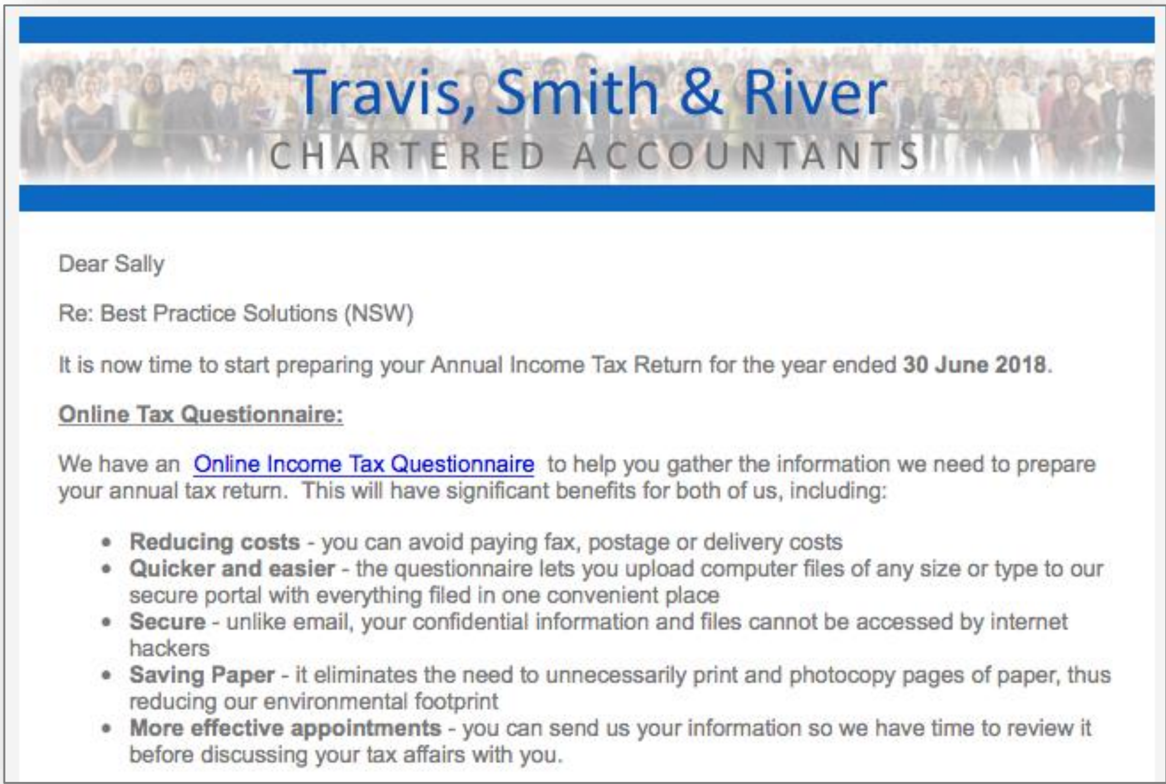
Email Communications

Email Communications in Nimbus has two functions:

1. The first is similar to your traditional MailChimp-type project. So, using a list of clients who you would like to send a newsletter, invite them to a golf day or to a seminar. Instead of going to your Practice Management system, creating a list, extracting it to a CSV file, then uploading it into your email marketing software, you are now able to work within Nimbus. As Nimbus connects directly with your Practice Management database, you won't be sending any emails to former clients who have been unsubscribed.

2. The other function of email communication is the ability to provide your clients with **crafted covering emails**. Traditionally, clients would receive a posted letter from you, explaining what you've done for them with a series of printed documents and lots of "sign here" sticky notes.

   Using Nimbus, we now work in the paperless electronic world, but we still need to provide that crafted professional letter. So, instead of an email with documents attached as PDFs, it's an email delivered through their normal email system **with secure links to the Nimbus system**. On a client's iPhone, they can sign and view a document in a couple of clicks.



Travis, Smith & River

CHARTERED ACCOUNTANTS

Dear Sally

Re: Best Practice Solutions (NSW)

It is now time to start preparing your Annual Income Tax Return for the year ended **30 June 2018**.

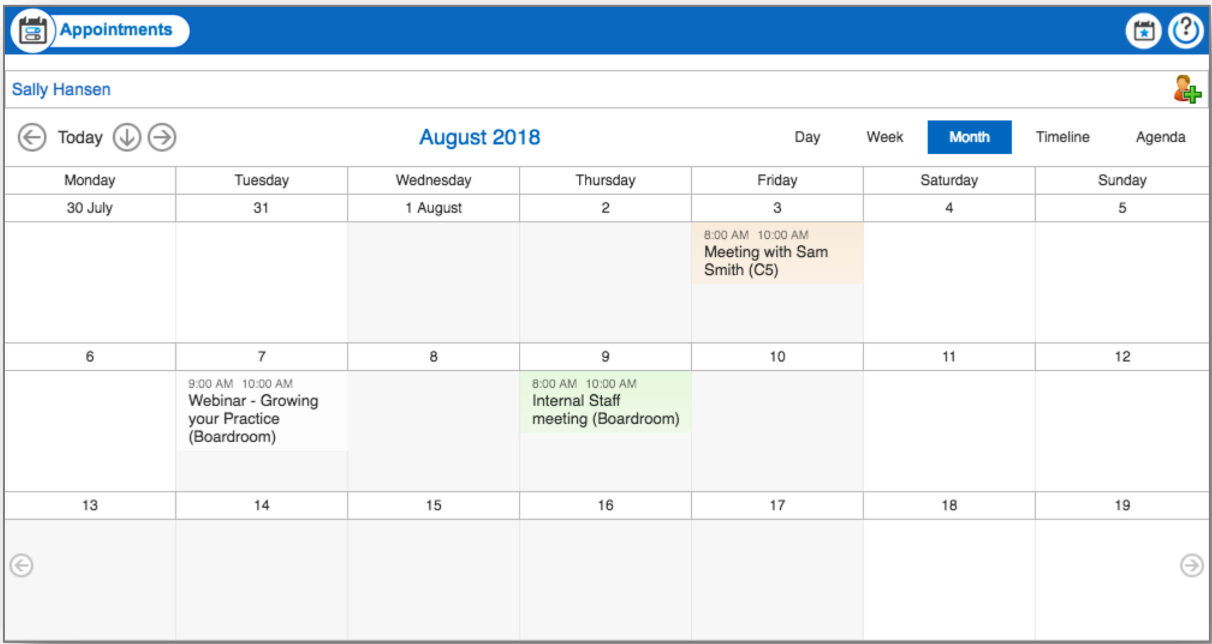
Online Tax Questionnaire:

We have an Online Income Tax Questionnaire to help you gather the information we need to prepare your annual tax return. This will have significant benefits for both of us, including:

- **Reducing costs** - you can avoid paying fax, postage or delivery costs
- **Quicker and easier** - the questionnaire lets you upload computer files of any size or type to our secure portal with everything filed in one convenient place
- **Secure** - unlike email, your confidential information and files cannot be accessed by internet hackers
- **Saving Paper** - it eliminates the need to unnecessarily print and photocopy pages of paper, thus reducing our environmental footprint
- **More effective appointments** - you can send us your information so we have time to review it before discussing your tax affairs with you.

Online Appointments

We're giving clients access to documents 24/7 so they can look at their past year's returns, or any correspondence that you've sent to them. Now they can make **Online Appointments** directly with you too. Linking in with your Outlook calendar, you can allocate time in your week to leave free to allow clients to book meetings with you.



This workflow feature is for your clients to instantly see when you're available and send through a meeting request seamlessly. When you receive a meeting request, you can delete, accept or propose a new time.

Who should use Nimbus?

As you can see, with the implementation of Nimbus comes a lot of opportunity and also some challenges in rethinking your business processes. It helps to set some parameters for compliance, yet leaves enough room for your own levels of governance. It enables you to leverage the efficiency by using **cloud document management**.

If your business has already moved to a cloud practice management or CRM system, Nimbus Professional is the next logical step.

Having Nimbus connected with your CRM system gives you not only the solution to creating and storing documents, and being able to access your archive, but also to deliver those documents to the client in a secure way.

About Nimbus

Nimbus is an independent software developer who focusses on providing Secure Cloud Document management and other Practice management solutions.

No matter which country, jurisdiction, or industry you are in – speak to us about how we can help you implement the best Document Management strategy for your business.

Please contact us for a demo on – we would love to give you a personal tour!

support@nimbusportals.com | www.nimbusportals.com

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www.nimbusportals.com

Australia: +61 7 3279 1700

New Zealand: 1800 646 287

South Africa: +27 21 531 7180

United Kingdom: +44 203 874 4440

United States: +1 (917) 677 2039

support@nimbusportals.com