

E-mail management - much more than just archiving

Bochum, November 20, 2019





- Why E-mail Management
 Requirements for an e-mail management tool
- Requirements of the GoBD Processing and archiving e-mails
- ECM Integration
 Complete and seamless Outlook integration
- windream E-Mail Management LIVE





Why E-mail Management

- √ 70 80% of corporate communications
- Archiving and recording obligations
- Commercial and business letters
 - Orders, commissions, ...
- ✓ Transaction-based storage
- ✓ Transparent & efficient access





Bitkom and VeR Guide to E-Mail Processing and Archiving

- E-mails must be retained if they fulfil the function of business letters.
- ✓ E-mails have to be stored electronically, printing on paper is not enough.
- File attachments must be kept in their original form
- ✓ E-mails must be archived without changes. Storage in a file folder is not sufficient for this purpose.



Bitkom and VeR guide to E-Mail Processing and Archiving

- ✓ The handling of e-mails must be documented. A third party must be able to understand the procedural documentation.
- E-mails are subject to the right of access to data by the tax auditor.
- Tax -relevant e-mails should be kept separate from other e-mails.
- ✓ Invoices as e-mails are permitted



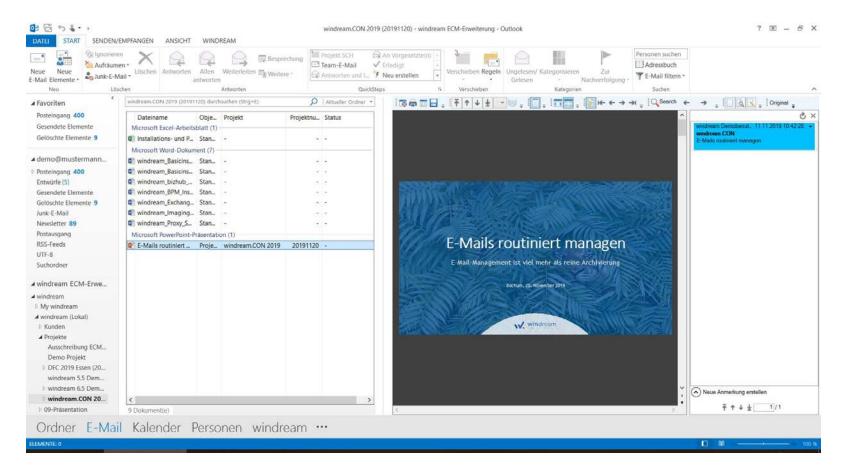


ECM Integration in Outlook

- ✓ Complete and seamless Outlook integration
- ✓ No need to learn a new interface
 - Maximum user acceptance
- Direct storage in the corresponding files
- ✓ Direct access to all ECM functions in Outlook
- Secure storage of e-mails in windream
- Automatic filing of e-mails
- Structured searches via e-mails and attachments



ECM Integration in Outlook







ECM Integration in Exchange

- Automatic Exchange Journal e-mail archiving
 - Also possible with Exchange 365 Online

Visit also "Mails in the cloud"

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- Rule-based e-mail archiving / rule wizard
- Transparent access rights
- Direct storage in the corresponding files





Full integration

No new working environment. Transparent filing and access to all information

Relief of the mail server

Duplicated information is avoided. Mailbox sizes are reduced.

Speed

Advanced search options.

Quick full text search.

Shorten backup and
restore times

Compliance

journal archiving and mailbox archiving are legally compliant









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