

# EntityManager™

BUSINESS FORMATION WORKFLOW SOLUTION

## Web-Based Order Management for Business Entity Formation

CorpData's EntityManager™ is a web-based business process automation tool designed to help business formation and registered agent service providers process and manage new business entities. EntityManager reduces time spent on routine tasks and enables a higher level of service. From entity formation and initial order placement to ongoing management, automatic invoicing, and annual renewals, EntityManager helps you to keep track of critical information and respond to changes and deadlines, quickly and efficiently.

By automating essential processes, EntityManager saves time and helps to ensure that critical information is accurate and always up-to-date. Utilizing a comprehensive database along with a variety of reporting functions, reminders, and sophisticated tools for document creation and storage, EntityManager streamlines the entire process of forming and managing business entities, and helps to maintain compliance across multiple jurisdictions. More importantly, EntityManager is easy-to-use, and reduces time spent on repetitive tasks, enabling managers or administrators to focus on higher-value service.

### Robust Order Management Capabilities

EntityManager allows you to standardize, record and manage all transactions associated with the filing and ongoing management of a business entity, simplifying the maintenance

of all entities under management. Centralized record-keeping and customizable reminders help you to keep track of important deadlines, ensuring compliance with jurisdictions and regulations. And, EntityManager is easily customizable to meet the specific needs of your office or practice. Its hierarchical, permission-based structure enables you to restrict access to specific modules or areas of the software, providing your users with as much or as little access as you require.

The screenshot shows the EntityManager ADMINISTRATOR SITE interface. At the top, there are navigation links for 'MAIN MENU' and 'MAIL CENTER', and a 'CONTACTS' section. Below this is a search and filter area with fields for 'Type of Activities', 'Subject', 'Result', and 'Comment'. There are also dropdown menus for 'Admin Login', 'Agent Login', and 'Office'. A date range selector is set to 'From: 19 February 2010' to 'To: 19 February 2010'. A dropdown menu is open, showing a list of contact persons: 'Main Administrator', 'masteradmin', and 'PMeese'. Below the search area is a table of contacts with columns for 'Edit', 'Contact Details', 'Initiator', 'Date', 'Priority', 'Agent', 'Contact Person', 'Subject', 'Comment', 'Result', 'Duration (minutes)', and 'Administrator'.

Edit	Contact Details	Initiator	Date	Priority	Agent	Contact Person	Subject	Comment	Result	Duration (minutes)	Administrator
✖	Email	Agent	14-Jan-2010 06:33 AM	Normal	misha123	Agent (misha123)	Testing internal mail system		Message was sent	1	masteradmin
✖	Email	Agent	08-Jan-2010 02:30 AM	Normal	misha123	Agent (misha123)	no subject		Message was sent	1	PMeese
✖	Email	Administrator	23-Dec-2009 02:24 PM	Normal	misha123	Agent (misha123)	no subject		Message was sent	1	masteradmin
✖	Email	Administrator	23-Dec-2009 02:21 PM	Normal	misha123	Agent (misha123)	RE: My test		Message was sent	1	masteradmin
✖	Email	Agent	23-Dec-2009 02:19 PM	Normal	misha123	Agent (misha123)	My test		Message was sent	1	masteradmin
✖	Telephone	Administrator	20-Oct-2009 09:22 PM	Normal	misha123	Agent (misha123)	we have new shelf companies			1:15	masteradmin
✖	Telephone	Administrator	25-Aug-2009 10:16 PM	Normal	misha123	Agent (misha123)	due			2:04	masteradmin
✖	Telephone	Administrator	13-Aug-2009 00:16 AM	Normal	HedgeFund1	Agent (HedgeFund1)	Where are the docs?			4:08	CaymanReg

CorpData's EntityManager aggregates all of your critical Entity information right at your fingertips, in a secure, and easy-to-use interface.

### PRODUCT HIGHLIGHTS

- ▶ Comprehensive Business Entity Management and Workflow Solution
- ▶ Web-Based for Convenience and Accessibility
- ▶ Supports Compliance and Due Diligence
- ▶ Secure Online Storage of Forms and Documents, to Share with Your Team or Clients
- ▶ Multi-Language Capabilities
- ▶ Easy-to-Install, Easy-to-Use
- ▶ Flexible and User-Configurable
- ▶ Scalable, to Grow With Your Business
- ▶ Lets You and Your Team Concentrate on Higher-Value Service to Clients
- ▶ A Robust, Yet Affordable Tool for Your Business
- ▶ Premise-Based or Hosted Models Available

## Centralized Document Storage

EntityManager's online document center allows you to store, search, and share important documents with your team or with your clients, safely and securely. The Document Center can easily upload and store an unlimited number documents, ready for secure, permission-based access from any computer, any time, anywhere. You can now accomplish in a matter of minutes what used to take days!

## Highest Security Standards

EntityManager utilizes the same type and level of encryption as used by the banking and financial services industry, ensuring that your records and documents are always safe and secure, so you can share them confidentially and confidently with your clients or team members.

## Easy to Install, Easy to Use

EntityManager is easy to install, requires minimal training, is user-friendly, and is easily configurable to meet your specific needs. CorpData offers a variety of EntityManager licensing plans targeting a wide range of users, from small but growing corporate formation services all the way to larger, international, multi-office operations spanning multiple continents and time zones.

## Highly Scalable, to Grow as Your Business Grows

Developed using industry-standard Microsoft .Net technology, EntityManager is robust, flexible, and scalable, enabling you to easily grow your business. What's more, by eliminating many repetitive and labor-intensive aspects of entity management, EntityManager allows you to perform in minutes what used to take hours – or even days! The result? You have much more time to spend on higher-value service to clients and prospects, providing a clear path to revenue growth!

## Learn More

To learn more about how EntityManager can reduce overhead and increase productivity for your practice, contact us at [sales@corpdata.com](mailto:sales@corpdata.com), to schedule a free, no-obligation demo.

## PRODUCT FEATURES

- The Document Template Library stores an unlimited number of frequently-used document templates, including Certificates of Incorporation, Articles of Incorporation, Elections of Directors, Acceptance of Director Election, Power of Attorney, Apostilles, Certificates of Good Standing, and hundreds of others.
- Automatic Document Generation creates the documents you use every day. Select a document from the template library, press a button, and all entity-specific information is automatically merged and an entity-specific document is ready to use.
- Secure, Permission-Based Log-In for Administrators, Distributors, and Clients
- Tracks Order and Payment Status
- Manages Document Delivery
- Provides E-mail and Other Process Automation Features
- Customer Self-Service Portal Allows Customers to Self-Register, Place Orders and Monitor Order Status at Their Convenience
- Sophisticated Filtering and Color-Coding Highlights Items Due for Service Renewal, Payments Outstanding, and Payment Past Due
- On-Line Document Warehouse Enables Unlimited Storage and Retrieval of Frequently-Used Documents
- Tracks On- and Off-Line Customer Contacts — Including Phone Calls, E-mails, Meetings, Faxes, On-Line Conferences and ICQ-type Communications — for Improved Workflow Management and Regulatory Compliance
- Monitors Key Dates to Generate Renewal Reports, Email Notifications, and Invoices
- Flexible Licensing Plans Make EntityManager Tools Available to Everyone from Small Businesses to Large, Multi-Office, International Organizations



For more information about how you can use EntityManager™ to streamline the management of business entities in your organization, please contact us at [sales@corpdata.com](mailto:sales@corpdata.com). | [www.corpdata.com](http://www.corpdata.com)

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