

OCTOBOX

email processing software

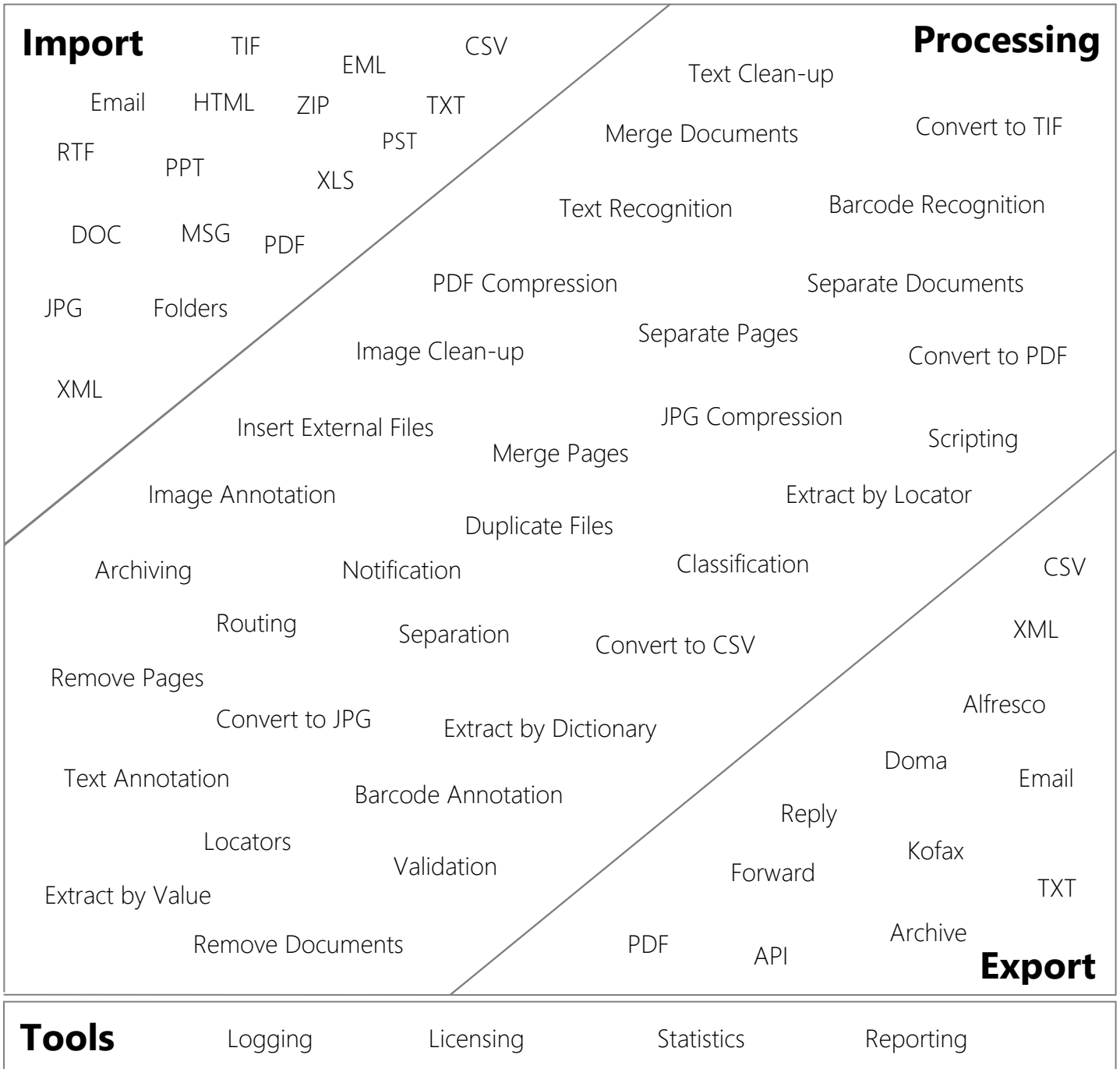
Features & Functionalities

Release 3.0

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FEATURES



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FUNCTIONALITIES



Import

Select incoming sources, locations and email accounts to process

Import from IMAP

Import EML and MSG

Import files/folders based on date modified

Import files using simple and XML trigger files

Import from specific (sub) folders in an email box

Move emails to processed or error email folders

Process embedded message files

Define file types to import and/or ignore

Import from Exchange

Import from PST files

Import folders as single object from file system

Import from Dropbox

Multiple email accounts

Import html/text body

Extract from (protected) Zip files

Replace missing or invalid extensions **New**



File Conversions

Convert attachments, documents and files

Convert image types (jpeg, png, tif, gif ...)

Convert text files (xml, csv, html, ...)

Output as TIF, JPEG, PDF

Output XLS to CSV

Generate PDF/A

Normalize PDF documents

Convert from encrypted files **New**

Convert MS-Office documents

Customize settings per file type

Output UBL 2.0 to PDF

Perform image cleanup

PDF super compression

Create searchable PDF



Archiving

Store documents on the file system

Archive original files and/or message file

Set folder and filename based on metadata

Execute as part of workflow or only on error

Archive specific documents

Generate trigger files

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Annotations

Extend documents with additional information

Annotate with barcode, text or custom image
Set location, orientation and size
Resize to prevent overwriting existing image

Set content based on metadata
Insert additional pages



Extraction

Extract information from email body, attachments and files

Perform high quality OCR
Recognize checkboxes
Process structured and semi-structured documents
Define list of document and batch extraction fields
Use database locator to find best matching record
Perform searches using regular expressions
Filter results on confidence and validation rules
Extract from fixed form documents **New**
Enable learning using trainable locators **New**
Extract repeating blocks **New**
Combine multiple locators for extraction **New**

Recognize handwritten text
Recognize 1D and 2D barcodes
Extract tables
Use dictionaries
Specify anchors and regions
Set include/exclude value lists
Extract by custom scripting **New**
Use relational databases **New**
Use structured function files **New**
Create fixed form extraction layouts **New**



Separation

Separate documents or files

Separate on barcode, extracted content
Separate after fixed number of pages
Separate by custom scripting **New**

Separate on changing values
Remove separator sheets
Separate before and/or after separator **New**



Merging

Merge document and files

Merge unclassified documents
Merge all documents to first
Merge specified document type to previous **New**

Merge all documents of same type
Merge all documents of specific type **New**
Merge all documents to a specific level **New**

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Classification

Classify to specific document type

Classify on barcode, extracted content
Classify on original filename
Classify by custom script **New**

Classify on origin
Allow multiple types per document



Removal

Remove document and pages

Remove specific documents
Remove fixed pages

Remove blank pages
Remove pages on barcode, extracted content



Validation

Conditionally validate extracted data

Define and group fields to validate
Use validation rules
Point&Click validation
View original files or email
Validate values with custom scripts **New**
Define lay-out per document type **New**
Allow multiple validation layouts **New**

Format values
Define required and manual confirmation fields
Validate from remote location
Character and/or field based validation
Custom lay-out validation screen **New**
Allow partial validation **New**



File Insertion

Insert files in the list of documents

Download and insert from file system or URL
Set insert location
Insert fixed list of files

Duplicate existing documents
Insert based on lookup from extracted value
Insert extracted file names

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Packaging

Add documents to zip archive

Package original files and/or message file
Encrypt compressed file

Package specific documents



Sorting

Sort document collection

Sort by original filename
Sort by barcode, extracted content
Set multiple sorting levels

Sort by origin
Sort by document type
Sorted result before or after unsorted documents

New



Notifications

Send custom notification emails

Send reply to sender
Send new email to administrator
Attach specific documents
Execute as part of workflow or only on error

Forward email to other recipients
Attach original emails or files
Custom html body



Export

Export documents to a variety of destination systems

Export to Kofax Capture
Export to SharePoint
Export to XML using XSL style sheets
Export extracted data from documents
Store export information in database
Allow partial export **New**

Export to Doma **New**
Export to Alfresco
Export to CSV
Export document structure
Export with custom activity **New**

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Rules & Patterns

Define business rules to classify emails and files for further processing

Define multiple rules per email account
Define matching patterns
Perform matching by metadata (body, header, ...)
Perform matching by file content, attachments
Use AND/OR/NOT/MATCH relations
Allow multiple executions for one email or file
Define rules using custom scripts **New**

Define black-list
Define white-list
Detect PDF/A, signed, protected and searchable
Perform matching by OCR on images
Custom tuning by using parent and child rules
Define specific workflow for each rule



Workflow

Create workflows to obtain the desired functionality

Create dynamic workflow
Use all the components listed above
Define workflow steps containing custom scripts

Specify document types to process each step
Optionally skip steps based on extracted values



Routing **New**

Re-route documents within the current or an external configuration

Route to another rule **New**
Route to another configuration **New**

Route to another activity **New**



Email Finalization

Features to configure how to process completed and rejected emails

Move processed emails to processed email folder
Set emails as read/unread

Move error emails to error email folder
Delete emails conditionally

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Logging

Log process information to provide traceability

Logging of services
Logging of processes

Logging of servers
Monitoring tool



Statistics

Features to configure statistics and reporting on used volume, processed emails and attachments

Reporting tool
Email metadata statistics
Process & server statistics

Volume usage statistics
Trace of emails/files