



Harness the power of Worldox and Microsoft Teams as you transfer files back and forth in a secure and cost-effective way.

Worldox integrates with Microsoft Teams to transfer data from Worldox to Microsoft® Teams and back. It leverages the power of Teams and enables document sharing and collaboration while the Worldox DMS continues to be your document repository.

Highlights include:

- Consistent Team naming based on Worldox Field Codes and Descriptions
- Creates new Teams on data transfer, if needed, or uses existing Teams
- Create Channels to share different types of content.
- Worldox files are clearly marked as having been shared in Teams
- A hyperlink will be available from the Worldox file list to quickly navigate to Teams using the Teams app or a browser
- Import files back into Worldox as a new version when completed in Teams
- Bring newly created files in Teams into Worldox as new files
- Send a message to a Team with or without a file link
- Send To options or buttons in the Worldox interface to facilitate sending and retrieving
- Audit trail shows when files are saved, sent, and retrieved from Teams

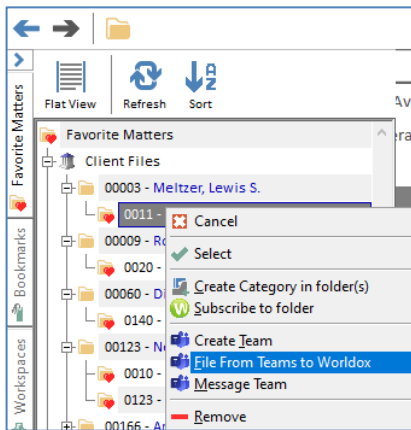
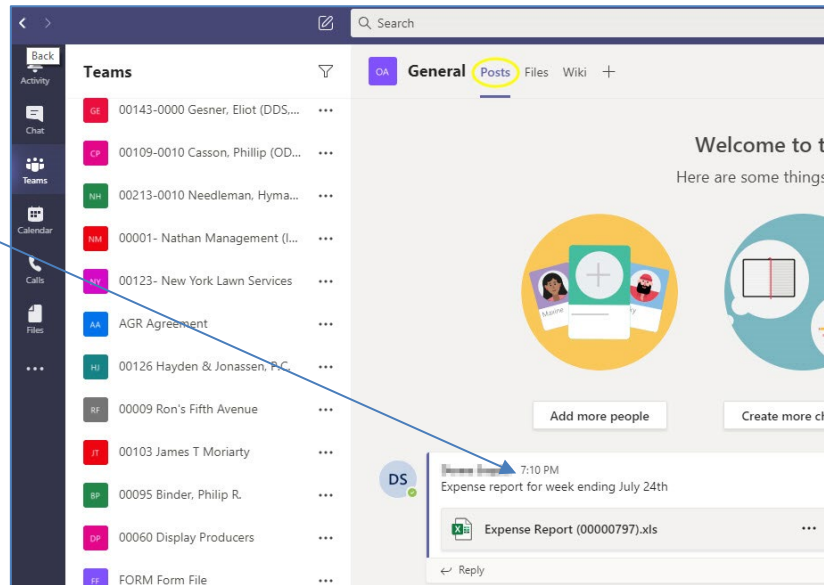
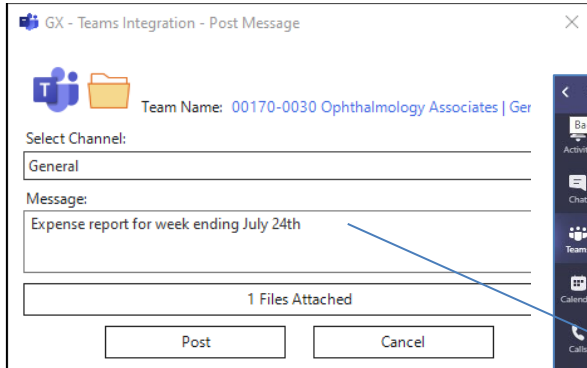
The screenshot displays the Microsoft Teams interface. On the left, a navigation pane shows 'Teams' selected. The main area shows a list of teams, including 'Pricing' and several 'General' channels. The 'General' channel is selected, and the 'Files' tab is active. A file named 'Strata Form Request (A1061795).pdf' is shown as shared from Worldox, with a download icon and a timestamp of 'About an hour ago'.

View of files shared from Worldox to Microsoft Teams





Share documents to Teams and collaborate with your colleagues with Worldox DMS as your document repository.

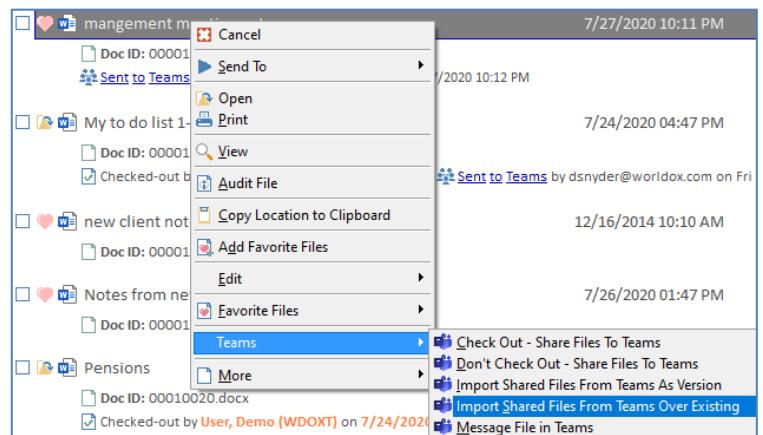


Write messages in Worldox and post them to Teams with files attached.

Create a Team from a Favorite Matter or a Cabinet and set up security before sending files there.

The Worldox and Microsoft Teams integration requires:

- Worldox GX4 - Version 14.5
- Updated to WDU 15 (Worldox code date of 10/21/19) or higher
- Workstations with Microsoft Windows 10 operating systems and Microsoft .Net 4.8 installed



Right-click in a Worldox file list to view command options for Microsoft Teams.

For details, contact your Worldox Reseller:

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