

KENDOX ACTIVEINFO CLIENTS. FILES. EVERYTHING UNDER CONTROL.

The digital work platform for law firms, tax consulting firms, and interdisciplinary practices

DAILY CHALLENGES IN A LAW FIRM

Law and tax firms spend a lot of time searching for, manually filing, and managing documents. Information is scattered across email inboxes, network drives, or various tools, so client files are rarely complete.

Emails, documents, and notes are stored in decentralized locations; versions of contracts or pleadings are unclear, and processing statuses are difficult to track. beA and beSt messages must be filed manually, which is error-prone and time-consuming. At the same time, compliance requirements related to GoBD, AO, and GDPR generate a significant documentation burden. This costs time, causes stress, and, in some cases, may even result in the loss of clients.

The screenshot displays the KENDOX ActiveInfo web interface. The top navigation bar includes the KENDOX logo, a search bar with the text "Suche in 01 DM Dokumenten Management > 01 Mandanten DM", and a "Nur aktive" filter. The main content area is divided into a left sidebar with a folder tree, a central list of documents, and a right-hand detailed view of a selected document.

Document List:

Document Name	Version	Author	Date
Projektplan -2 (4373266)	V 0.1	Severin	15:34
Angebot IT Service (4373192)	V 0.2	Severin	15:33
Projektplan Mandant-Nr. 54322 (4373212)	V 0.4	Severin	15:33
Screenshot Aktenansicht (4373296)	V 0.1	Cornelia Muster	15:32
Mahnung Mandant-Nr. 54322 (1) (4373276)	V 0.1	Severin	15:31
Mahnung Mandant-Nr. 54321 (1) (4373270)	V 0.1	Severin	15:31
Meeting Protokoll Versionstest (4373240)	V 0.1	Severin	15:30
Meeting Protokoll (4373228)	V 0.1	Severin	15:29
Checkliste Onboarding (4373302)	V 0.1	Severin	15:29
Datenschutzerklaerung (1) (4373306)	V 0.1	Severin	11:36
ActiveInfo Erste Schritte (1) (4373288)	V 0.2	Cornelia Muster	11:25
Datenschutzerklaerung (4373256)	V 0.1	Severin	11:21

Document Detail View (ActiveInfo Erste Schritte (1) | V 0.2):

- Versionen (2):** überarbeitet (V 0.2 | Cornelia Muster | 11:25), Version muss aktualisiert werden zu V 0.1 | Nicole Stopper | 11:25
- Kommentare (1):** Dokument erstellt. (V 0.1 | Cornelia Muster | 11:06)
- Anhänge (0):**



KENDOX ACTIVEINFO – THE DIGITAL CLIENT FILE FOR YOUR LAW FIRM

Kendox ActiveInfo consolidates all client-related information – such as pleadings, contracts, tax assessments, and correspondence – into a single, centralized digital file. Documents, emails, beA/beSt messages, reports, and notes are stored in a structured manner, are quickly searchable, and are archived in an audit-proof manner. Your team continues to work in the programs they're used to – only significantly more efficiently and with full file context. A specially secured partner area also enables secure collaboration between your partners.

Furthermore, **Kendox ActiveInfo** serves as a central platform for other areas of your organization: In addition to traditional back-office tasks, invoices, contracts, marketing materials, HR files, and IT documents can also be managed conveniently and consistently.

Thanks to AI-powered search, you can find content in seconds, even if you don't know the file name. AI summaries help you quickly grasp the content of contracts and expert opinions and assess them from a legal or tax perspective. Workflows automate approvals and reviews, ensuring processes run transparently and requiring less manual intervention.



SEAMLESS INTEGRATION

Kendox ActiveInfo integrates seamlessly into your existing system landscape. Emails from Outlook, Office documents, and collaboration in Microsoft Teams are directly linked to the corresponding client file. Through the interface with DATEV, client, case, and order master data remain synchronized, and all documents and reports are stored in a structured manner. beA and beSt messages are securely sent, received, and automatically archived, including the management of certificates and proxy arrangements.



FOCUS ON SECURITY AND COMPLIANCE

The solution supports you in working in compliance with GoBD, AO, and GDPR requirements. Audit-proof archiving, comprehensive access logging, defined retention periods, and deletion policies are firmly integrated into the system. Role-based permissions ensure that lawyers and tax advisors in multidisciplinary firms can collaborate on files, with clearly separated access rights and a structure that complies with professional regulations.



HOW KENDOX ACTIVEINFO TRANSFORMS YOUR DAILY WORKFLOW

Before Kendox ActiveInfo	With Kendox ActiveInfo
Documents are difficult or impossible to find	Relevant documents are available in seconds via search
Emails are stored in personal inboxes	Emails are automatically placed in the correct client file
beA/beSt incoming messages are filed manually	beA/beSt messages are automatically archived in compliance with legal requirements
Unclear versions of contracts and pleadings	Clear versions with check-in/check-out and version history
Time-consuming compliance documentation	Seamless logging, with integrated retention and deletion policies
Collaboration between attorneys and tax advisors with media discontinuities	Shared files with separate access rights and shared workflows
Long onboarding process for new employees	Intuitive interface, productive from day one, reduces onboarding time



FURTHER INFORMATION AND CONTACT

Are you interested in a personal consultation, or would you like to experience **Kendox ActiveInfo** live in a concise web demo and tailor it to your processes? Get in touch with us – we look forward to hearing from you!

Online: <https://www.kendox.com/unternehmen/kontakt/>

Email: kontakt@kendox.com



BENEFITS

- Complete, digital client files with documents, emails, tasks, and history
- AI-ready: intelligent search and summaries save valuable time
- Compliant with professional regulations and legally secure – including support for GoBD, AO, and GDPR
- Seamless integration into Microsoft and DATEV environments
- Get up and running quickly thanks to an intuitive interface and minimal training requirements