Why Therefore™

Your Challenges

EFFICIENT RESPONSE TIMES
Difficulty accessing correct information; slow, chaotic processes.

SECURITY
Preventing unauthorized access; data backup; disaster recovery.

COMPLIANCE
Information retention for legal purposes; confidentiality of personal records.

COST EFFECTIVENESS
High storage costs in multiple locations; time and labor-intensive processes.

Therefore™ Gives You

PRODUCTIVITY
Recoup the time you lose to information searches and chaotic processes.

REACTIVITY
React to your customers' needs in a timely, professional manner.

VISIBILITY
Maintain a clear overview of your processes, track business-critical metrics.

SECURITY
Keep your information safe, secure and confidential.

FLEXIBILITY
Access your information anytime, anywhere. Easily upgrade and expand.

Staying ahead in a competitive marketplace requires efficient processes and the ability to use information as a strategic asset.

Protect yourself from data security breaches, gain visibility into your operations, and boost productivity through flexible and intuitive information management.

With Therefore™

CAPTURE and utilize paper and electronic information.
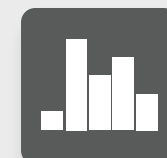
ACCESS your data anytime, anywhere.

SECURE data within a central, digital repository.

AUTOMATE and optimize core business processes.

MANAGE information as a strategic asset.

ANALYZE and react to key performance indicators.

Therefore
PEOPLE·PROCESS·INFORMATION

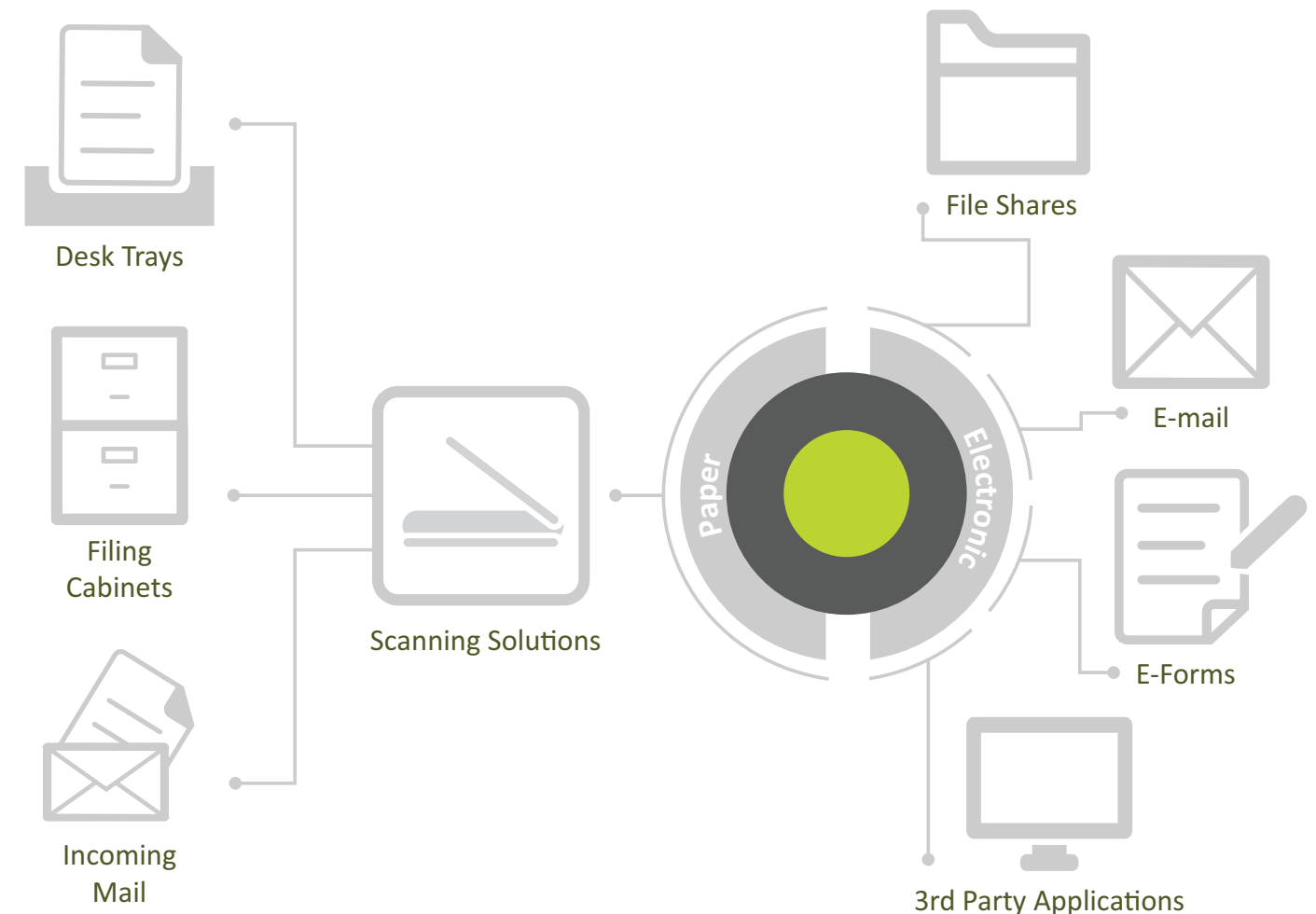## UTILIZE YOUR PAPER AND ELECTRONIC INFORMATION

Capture your business information, regardless of its format.

Import and index with ease. Organize information within a metadata-driven repository, and easily find it later.

- **Electronic documents** – Efficiently import electronic information into the central repository with simple drag-and-drop, direct saving from many native applications, and automatic importing and indexing options.

  Integrate seamlessly with Microsoft Office applications, ERP systems and various third-party productivity applications. Securely save all your business-critical documents within a single, central repository.

- **Paper documents** – Scan and index directly from MFP devices or desktop scanners. Automatic document classification and OCR extraction are available with advanced scanning solutions.

Desk Trays

Filing Cabinets

Incoming Mail

Scanning Solutions

Paper

Electronic

File Shares

E-mail

E-Forms

3rd Party Applications

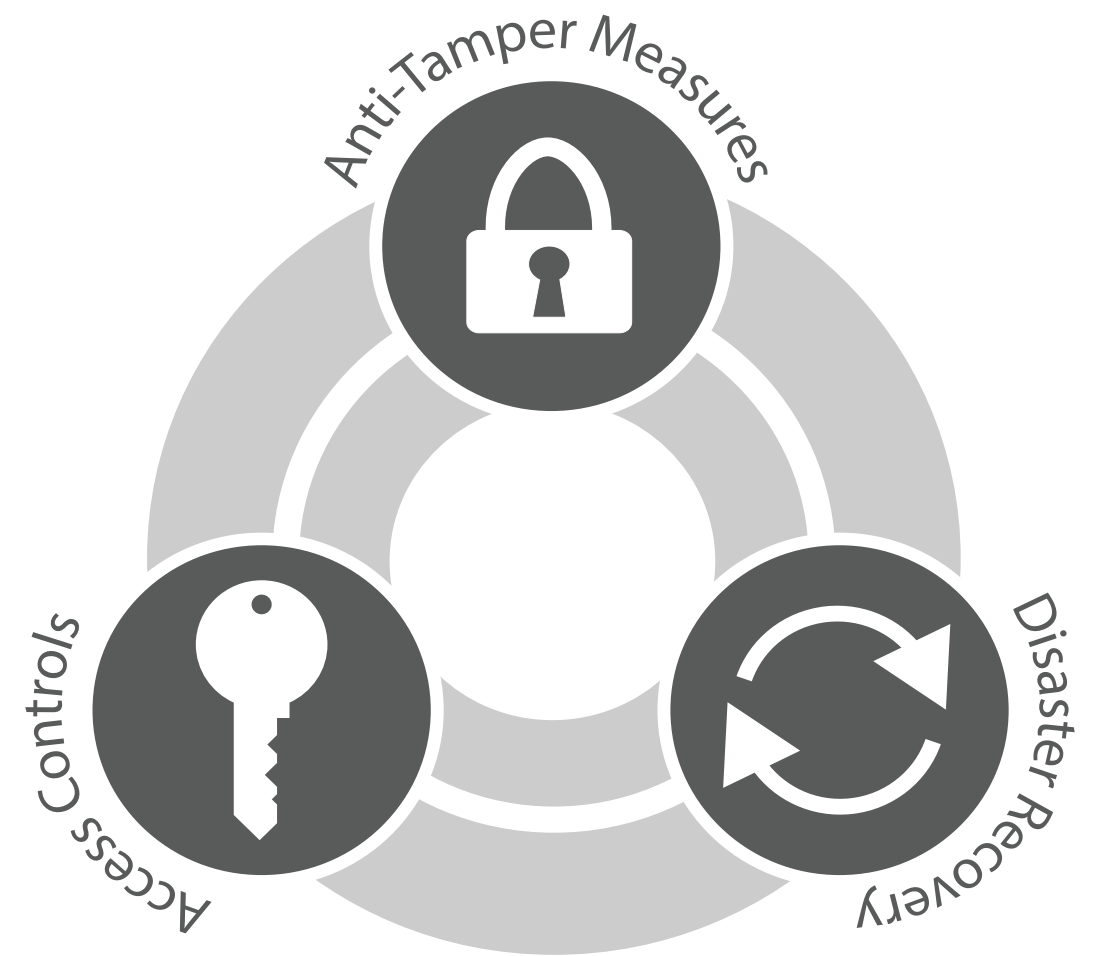
Feature Focus: THEREFORE™ FORMS

Therefore™ Forms give you a fast and intuitive way to get data into Therefore™. Forms are easily designed and customized, and they can be used either internally or hosted on an external website. Forms make employee vacation requests, customer satisfaction surveys, and many other processes faster, smarter and more reliable.

Therefore

STORE YOUR DATA IN A SECURE, DIGITAL REPOSITORY

Data and information security is critical to your business operations.

Therefore™ gives you the tools to ensure that your information can only be accessed by authorized personnel, is safe from external threats, and is securely backed up.
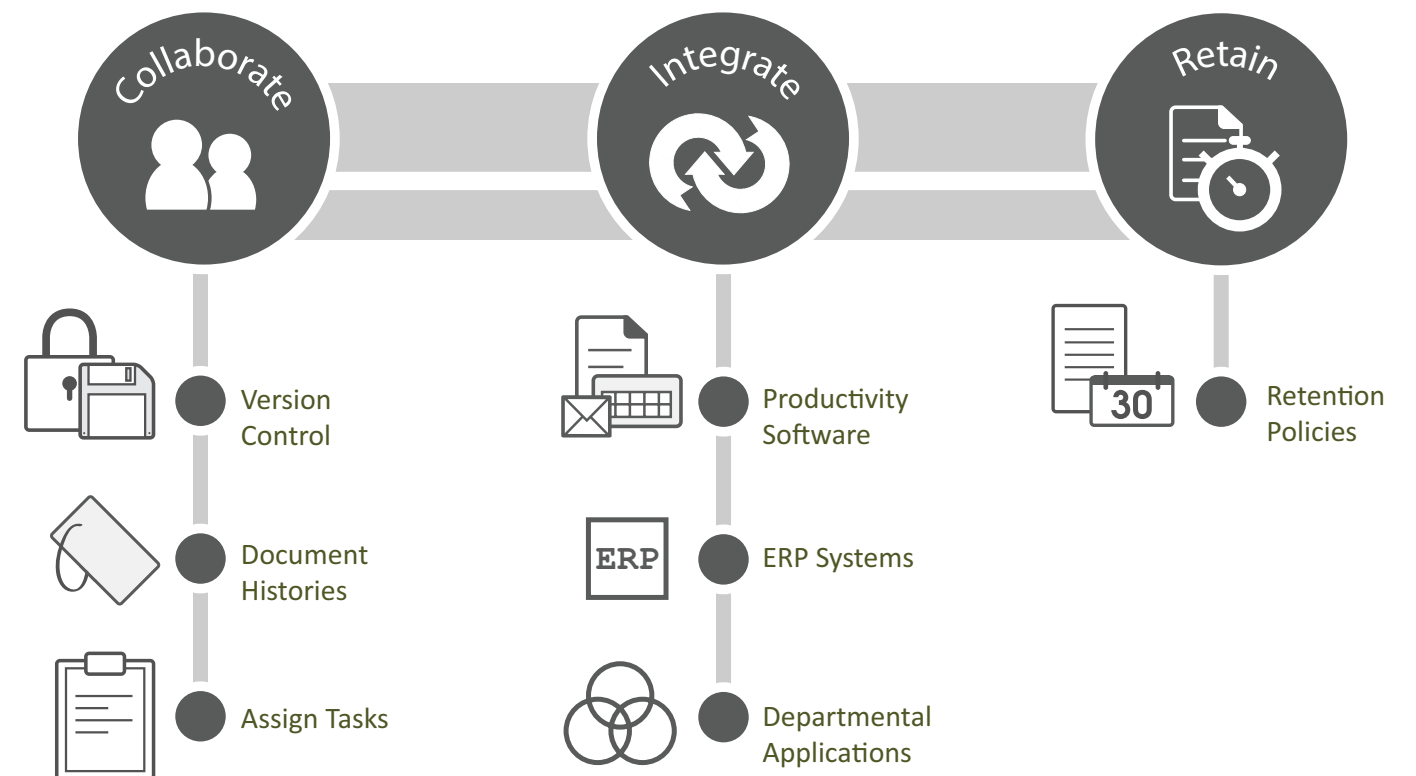
- **Access controls & permissions** – Only authorized users can access the system. Permissions to view or edit specific content can easily be defined for individual users or user groups.

- **Anti-tamper measures** – Each time a document is saved, it is signed with a digital security signature. The system verifies the authenticity of the signature each time the document is retrieved to check for tampering.

- **Disaster recovery** – Therefore™ automatically stores your data on primary and backup storage devices, so it can be restored in case of drive failure.

Anti-Tamper Measures

Disaster Recovery

Access Controls

MANAGE YOUR INFORMATION AS A STRATEGIC ASSET

Information is dynamic. Update, refresh and manage it effectively across all areas of your business. Start letting your information work for you.

- **Collaborate** – Check-out functionality and version control ensure all team members can easily access the most up-to-date version of a document. Easily track changes, and assign tasks to other users.

- **Integrate** – Remove information silos, and consolidate all business-critical documents within a single, central repository. Therefore™ offers multiple integration options for ERP systems and third-party applications.

- **Retain** – Manage your information throughout its entire lifecycle. Easily comply with legal and regulatory requirements regarding confidentiality and retention schedules.

Collaborate
- Version Control
- Document Histories
- Assign Tasks

Integrate
- Productivity Software
- ERP Systems
- Departmental Applications

Retain
- Retention Policies

Feature Focus: THEREFORE™ CASE MANAGEMENT

Therefore™ Case Management makes it easy to organize and manage groups of documents logically and intuitively, whether it's for contract management, employee or patient records, customer files, quote management, or more. With Case Management, you can:
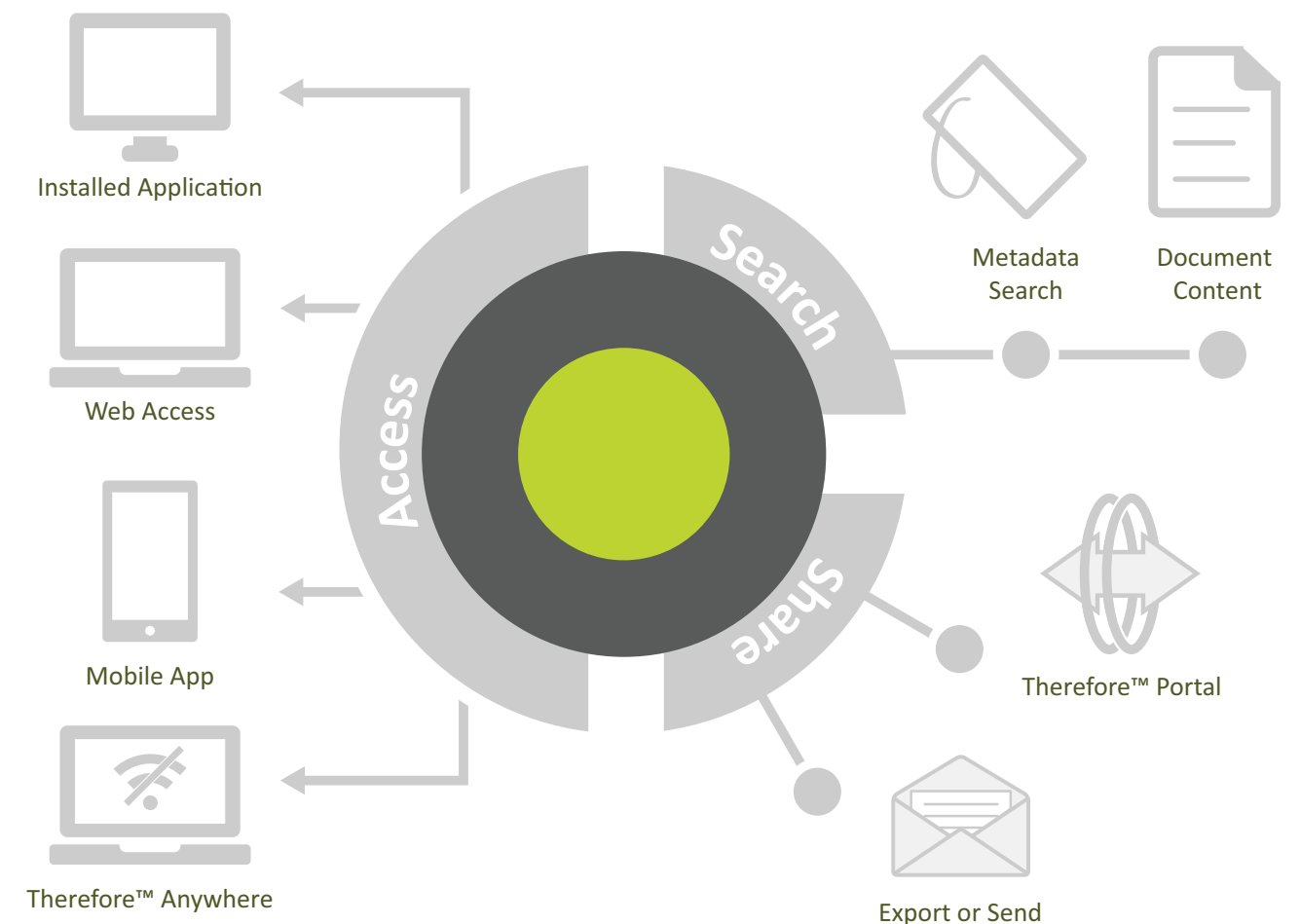
- Group and manage interrelated documents with better visibility and faster retrieval.
- Link cases to workflows, close cases and create retention policies for lifecycle management.

ACCESS YOUR DATA ANYTIME, ANYWHERE

Your information needs to move with you. With Therefore™, you can always access your information, even when traveling or working remotely.

- **Search** – Quickly locate the information you need. Search the repository based on a document's metadata or its contents, regardless of where it's saved in the system.

- **Access** – Access your information in the office, on the web, or on a mobile device. Therefore™ Anywhere allows you to edit documents offline and re-synchronize them later.

- **Share** – Easily share information with those inside or outside of your organization. It's simple to export, e-mail, or optionally share information on the Therefore™ Portal.

Installed Application

Web Access

Mobile App

Therefore™ Anywhere

Search

Access

Share

Metadata Search

Document Content

Therefore™ Portal

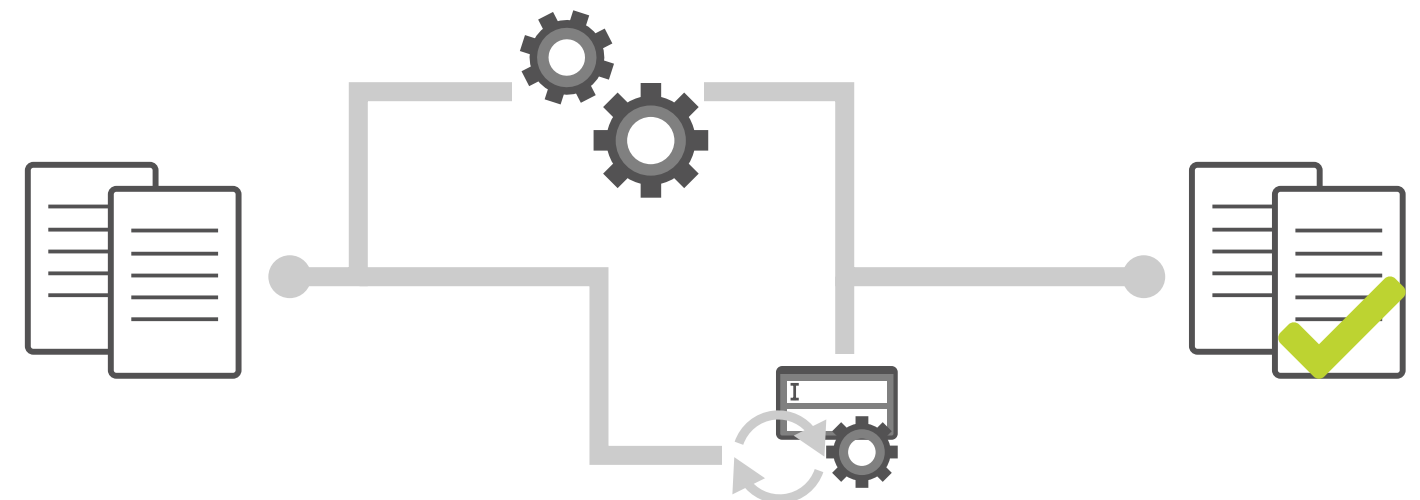Export or Send

Feature Focus: THEREFORE™ PORTAL

The Therefore™ Portal gives you an efficient and secure way to share information directly with external parties. Easily embed the Portal into your website and customize it to fit to the look and feel of your company. External parties can sign-on with secure login credentials and will only be able to view and download documents that pertain to them.

Therefore
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AUTOMATE

AUTOMATE AND OPTIMIZE CORE BUSINESS PROCESSES

Streamline operations and boost productivity by automating your core business procedures. Gain greater efficiency, visibility and consistency.

- **Therefore™ Workflow** – Therefore™ lets you automate core business processes with its powerful workflow engine. Easily route workflows into parallel streams, so multiple people can work simultaneously, and let the system take care of a wide variety of automatic tasks for you. Escalation procedures and automatic notifications ensure that you never miss a deadline due to forgetfulness again.

- **Therefore™ Content Connector** – The Content Connector continually monitors input folders and mailboxes and automatically saves and indexes incoming documents. Workflows can be automatically started when a new document arrives.

Therefore
PEOPLE PROCESS INFORMATION

ANALYZE AND REACT TO KEY PERFORMANCE INDICATORS

Analytic information is vital for your company's success. Stay on top of the metrics most valuable to you, and immediately react to changes in performance or operations.

- **Report** – Schedule reports and have them delivered automatically at regular intervals. Gain visibility into your organization's inner workings, and make insight-driven business decisions.

- **Track** – Take advantage of complete audit trails on document and user actions to help you comply with governmental and security regulations.

- **React** – Bring your data to life with dynamic, real-time dashboards using an integration with Microsoft® Power BI. Gain visibility and immediately react to changes in performance indicators.

Report

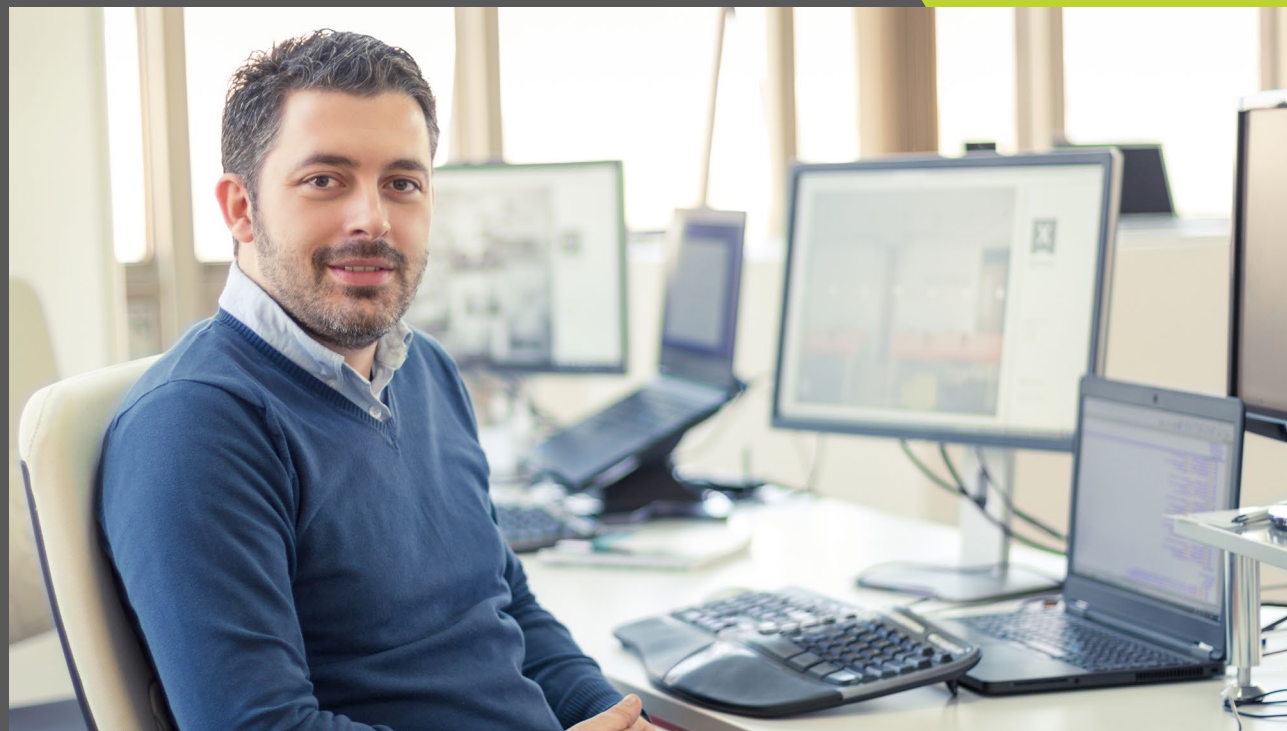Track

React

Why Therefore™

Flexible.
On premise, or in the cloud; single-departments or multi-site enterprises. Add or subtract users as you need.

Intuitive.
With its familiar, easy-to-use interface, users can quickly and easily learn how to use the system.

Scalable.
From SMB to the enterprise; start simple, and add more functionality as your business grows.

How Therefore™ Helps

HUMAN RESOURCES
Streamline recruiting, onboarding and off-boarding processes; easily manage leave requests; keep employee records secure, confidential and easy to retrieve.

FINANCE
Optimize invoice processing with workflows and automatic linking; track approvals and maintain complete payment records; automate payroll and integrate with existing ERP software.

LOGISTICS
Digitize the approval of invoices, credit notes, and hauler payments; streamline customer invoicing and transport documentation; maintain a complete audit trail on all document actions.
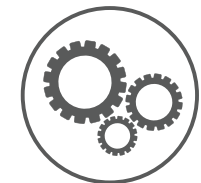
CUSTOMER SERVICE
Easily group customer documents into digital binders; ensure the most current information is easily retrievable; inform customers instantly on the status of their orders or requests.

CONTRACT MANAGEMENT
Automatic notifications for approaching expiry dates; ensure the correct contract is signed with version control; automatically manage contract e-signing processes.

MANUFACTURING
Securely store and quickly retrieve material certificates, SOPs and training records; automate product warranty registration; ensure all health and safety information is easily accessible.

And that's just the beginning! Therefore™ can be configured and customized to suit any departmental need or process, leading to streamlined operations, increased productivity, and higher customer satisfaction.

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