FILENEXUS® FOR RETAIL

The **FileNexus® Enterprise Document Management System** gives organizations, both large and small, the ability to capture virtually any type of document from any source (i.e., paper records such as maps, drawings, manuals; electronic files such as host generated reports, client statement streams, emails, IVR recordings, etc.), index and compress them for secure archival and future recall-providing a single cohesive repository for all document management, workflow, archival and business continuity needs.

Here are some examples of how retailers use FileNexus® in different parts of their operations including but not limited to Finance, Customer Service, Legal, Human Resources & Purchasing:

> *"There were different technologies out there, but when we saw what Loris and FileNexus® could do, it was an easy decision on our part… the reaction here was jaw dropping."*
>
> *Ralph Thrun, Finance Manager, Continuous Improvement, Rogers Communications Inc.*

ALL DEPARTMENTS

Capture, Organize & Archive Any Type of Record, From Any Source
FileNexus® provides a single cohesive repository to automatically capture all of your information from third-party applications, print streams, email, images, IVR recordings, PC files, Web Forms, Portals, you name it; and automatically index and organize these records just the way you like.

"It's so easy to use and has saved us so much time and money."- Darren Hurd, Director of Finance and Accounting, Thompson Cigar

Automate Any Workflow Environment
FileNexus® allows you to automate any workflow, organizing pending tasks, providing personalized workflow action buttons and interface, based on individual user requirements.

Manage & Track All Aspects of Your Business
Use FileNexus® dashboards to track and report on business workflow outcomes, functions, staff productivity, etc. FileNexus® can also automatically export key information for use in spread sheets or other third-party analytics applications.

"Before FileNexus®, the auditors would send 7 people for 5 weeks down to our Wilmington offices to do audits. It was a huge expense. Now they send 2 people for 2 to 3 days."-John Hall Accounting and Information Services, The Hillman Company

Automatically Distribute & Allow Access To Data By Staff, Vendors, Or Clients
Automatically capture, manage and securely distribute data electronically from any source – from host reports, to payment streams, to client statement runs. Distribute and allow access to information by way of portals, through integration to third-party application screens or the FileNexus® Web Client.

Two-Way (Push-Pull) Integration With Third-Party Applications
FileNexus® provides for two-way integration with such third-party apps as CRM, Finance, Accounting, Administration, HR, etc. by way of web services, ActiveX, URL links, command line parameters (depending on the platform). FileNexus® can update other applications as new records come in (for example, tell another system that a bill has been paid) or retrieve information from other systems to update the files it stores – either way, staff time doing data entry and keying errors are dramatically reduced.

"We have over 800 organizations using our financial application. FileNexus® is world class - it's our standard. Our customers are blown away by our integrated solutions."- John Leslie, CEO, Multiview Corporation

Intelligent Internal Task Assignment – Automated work assignment "push" tasking to individual staff based on task priority (SLA's, time elapsed etc.), staff qualification, staff availability (based on current task load, absence due to illness or vacation). Management adjustable metrics for controlling task assignment - management dashboards, alerts, individual productivity etc.

Web Based Smart Forms – Provides forms for data capture on the web, automatically determine which form to present next based on previous data input, automatic update of internal systems with form input data, allow for printing where signature is required, endorse smart bar codes on printed "for signature" documents to allow for automated processing on receipt of form from the outside party.

Secure Corporate/Third Party Communication Portal – A secure vehicle for communication between internal corporate staff and outside parties, including automated workflow routing, new message notification, attachment/enclosure forwarding, complete tracking and archival of the complete communications stream.

"It just saves our 200 retail partners time and energy."- Lee Fortney, IT Director, ICI Canada

E-Contracting – Automation of the entire on-boarding process for third parties such as brokers, agents, vendors etc., including web smart forms for data entry, enclosure of relevant documentation, automated workflow/routing, verification checks against third party systems, user adjustable decision engine for decline/accept/maybe rating process and update of relevant hosts systems after decision is complete. Secure archival of all relevant information to FileNexus®.

Supports Disaster Recovery & Business Continuity Plans
FileNexus® ensures business continuity in the event of a disaster. It fits into whatever environment you have (physical, VM, cloud, multiple site, cluster, SAN, NAS).

"We now have information at our fingertips that we never had before. People are doing what they get paid to do and aren't chasing paper."- Ralph Thrun, Finance Manager, Continuous Improvement, Rogers Communications Inc.

Supports Compliance With Audit & Regulatory Requirements
Automated audit log tracking of all record movements/versions/locations, protection of original records, retention scheduling, data encryption, advanced user security controls and many other security features are ready to go "out of the box". Many FileNexus® users consider FileNexus® a cornerstone in helping them comply with regulatory requirements such as Sarbanes-Oxley, SEC, OSFI, FATCA, PIPEDA, PCI, Litigation Support, HIPPA, Audit and so on.

Eliminate Third-Party Costs For Storage, Hosting, E-Presentation, Media & so on
Eliminate costs related to document production, storage, hosting fees, shredding, media, retention, etc.

"The biggest benefit FileNexus® has given us is the ability to track documents as they go through the various approval processes. Before, files were consistently getting lost. With FileNexus®, that just doesn't happen anymore."- Greg Hennig, Controller, Grocery Outlet

Proven Performance
Representative organizations employing millions of people now rely on FileNexus® as their mission critical document archive, workflow and records management strategy.

FINANCE
Automate the Accounts Payable Process
Create workflow processes to streamline and automate the entire procure-to-pay cycle, from initial ordering right through to payment. FileNexus® can automatically capture, archive, track and link purchase orders, packing slips, expense invoices, vendor invoices, payment data streams and cleared cheques—making the entire package available for approval and audit.

Capture & Archive all Financial Information
Electronically capture, index and securely archive all financial information from any source, such as statements, financial notes, general ledger, capital expenditure requests, journal entry supporting documents, personal property tax returns, sales reconciliation documents, etc.

Eliminate Manual Processing of Customer Payments
Stream customer payment records directly into FileNexus® from your bank payment clearing center. Automatically capture and archive customer and store credit card payments, and automatically update the host financial system—no data entry required.

Eliminate Manual Processing of Cleared Cheques
FileNexus® can automatically capture images of cleared cheques received electronically from your bank and link them to previously archived records—eliminating the need for manual processing, such as data entry into host systems.

Capture, Index & Archive Expense Requests
Submit employee purchase card receipts and expense invoices automatically. Capture, index and archive all employee expenses—eliminating manual processing, tracking and storage of all paper receipts.

*"The integration of FileNexus® into our environment has allowed us to make better use of our time and resources. We can allocate more to planning and evaluating, and less to manual, non-value added functions." - Howard Blaufarb, Director, Accounts Payable & Financial Services for dELiA*s*

Automatically Capture, Burst & Distribute Host System Reports
Automatically capture, index, burst and distribute all host system reports such as payroll, quarterly inventory, weekly receiving documents, mark ups and mark downs, inventory calculations, reconciliations between physical and perpetual inventories, debit/credit settlement reports, etc.

Simplify the Accounts Receivable Process
Dramatically simplify the accounts receivable process from initial ordering right through to payment. Automatically track everything from the original Purchase Order, proof of delivery, invoice and final payment from the customer. FileNexus® can even be set to automatically update your host system—no data entry required.

Seamless Integration with Existing Financial Systems & Web Portals
Integrate and link FileNexus® with your host financial system. Instantly access all archived documents directly from the host screen—without having to log into FileNexus®. Link FileNexus® to web portals for access to records by staff, vendors, customers, etc.

Meet Audit & Regulatory Requirements
Auditors have immediate access to all the information they require. FileNexus® can be set to automatically update previously archived records with new information, such as updating a previously archived Purchase Order with a cheque number with which the vendor invoice was paid. All record movements are automatically tracked in the FileNexus® audit log, creating relationships between related records.

CUSTOMER SERVICE
Securely Capture & Archive All Client Information – Everything From Everywhere
All customer service records from any source including but not limited to applications, correspondence, emails, contracts, confirms, bill statements, payment records, service orders, phone logs, phone records, IVR recordings, complaint resolution process, etc. – everything from everywhere. No paper, no filing—a comprehensive client profile instantly available to the desktop at the click of a mouse.

Automate Workflow Processes from New Client Sign-Up To Account Close Out
FileNexus® can dramatically streamline the client management process by creating, capturing, indexing and securely archiving all client sign-up, account management (including but not limited to incident reports, credit requests, returns, authorizations, and so on) and close out documents into one streamlined client workflow process—dramatically speeding up client support resolutions and rationalising operations.

"During audit, we simply provide the auditors with access to the FileNexus® system, and they don't have to bother our staff—all the information they need is there. They love it because they are not waiting on us."- Greg Hennig, Controller, Grocery Outlet

Keep Your Client Information Secure
Using appropriate security privileges and access controls, FileNexus® can be configured to ensure managers, CSRs, staff and individual clients view only the information they are entitled to see.

Seamless Integration with Existing CIS Systems
Integrate FileNexus® with your existing CIS system. Access archived files directly from your host screen with the click of a button. All the information required—when and where you need it.

Seamless Integration With All Customer Service Systems
Integrate FileNexus® with your existing systems, including but not limited to CIS, CRM, Call Centre, Contact Management, IVR, etc. Access archived files directly from your host system screen with the click of a button. All client information from everywhere—instantly. All you require, right when you need it.

Automatically Link Service Orders to Customer Files
Batch scan service orders directly into FileNexus®, automatically link to customer file and update service order status - saving valuable data entry time. If you use tablets for service orders, FileNexus® can capture information automatically – no scanning required.

Manage Customer Complaints Process
Capture, index and archive customer complaints and automatically update your customer complaint status. Set auto generated alerts to notify a user if a pre specified amount of time has elapsed without a complaint being responded to. Annotate documents and track the customer complaints resolution process from start to finish.

"Research is easier from day to day. I can quickly find things in FileNexus® that used to take me much longer to locate manually." - Darren Hurd, Director of Finance and Accounting, Thompson Cigar

Web Portal Access For Clients
Automatically capture and store all client related information such as client newsletters, customer loyalty, statements, special offers, notices, etc., and link it to your existing web portal. FileNexus® can be set to automatically notify your clients when new information is available, and allow them to review all previous information.

FileNexus® Web Forms For Clients & Staff
FileNexus® can easily generate custom web forms that capture, create and track documents from any web browser. Clients & staff can simply fill out a FileNexus® Web Form for things like pre-authorized payments, vacation start/stops, credit requests, returns, authorizations, compliance records, incident reports, service upgrades, application for service, removal of temporary or permanent service, etc.

LEGAL
Lease & Lease Support Documents
Electronically capture and securely archive lease agreements and all supporting documentation, eliminating the storage of paper documents while providing instant access to the information as required.

Capture & Archive Franchise Support Documents
Capture, store, index and compress pictures, maps and supporting documents from all franchise locations for secure archival and future recall, providing a single cohesive repository for all franchise locations.

"FileNexus® is a growing type tool. The more our staff use it, the more they take the initiative themselves to creatively develop new ways of increasing efficiencies. We have come to rely on it more and more."- Greg Hennig, Controller, Grocery Outlet

Web Portal Access For Franchisees
Allow franchisees secure access to their own information through a self-serve portal.

FileNexus® Web Forms For Franchisees, Staff & Management
FileNexus® can easily generate custom web forms that capture, create and track documents from any web browser. Franchisees can simply fill out a FileNexus® Web Form for things like franchise applications, franchise agreements, franchise disclosure documents, requests, special licenses, term, renewal, termination and transfer of the franchise, annual reviews, questionnaires, etc.

HUMAN RESOURCES
Capture & Archive All HR Information
Electronically capture, index and securely archive all HR information from sources such as resumés, offer letters, performance reviews, timesheets, benefits documents, payroll data, reprimands, policies and procedures, etc.

"There isn't anything we're not archiving"- Millie Williams, Interim executive director of Human Resources, East Baton Rouge Parish Schools

Track The Hiring Process To Completion
Store and search through resumés, job applications, test results, references, etc. and track the hiring process through to completion.

Annual Reviews & Staff Management
Automate the whole annual review and staff management process with workflow-based routing of review forms for management approvals, vacation requests, timesheets, event triggers, notifications, etc.

"If we ever need to reference documentation on employees, it's just a mouse click away. It saves us a lot of time, and is a lot more efficient" - Jordan Clements, East Baton Rouge Parish Schools, Supervisor of Payroll and Benefits

Send E-Notification Alerts for Certification/License Renewals
Set alerts to generate and automatically distribute notifications for certification/license renewals, employee certifications, performance reviews, etc.

Web Portal Access For Staff
Allow employees secure access to their own information such as pay stubs, vacation requests, performance reviews, etc. through a self-serve portal.

Automatically Capture & Distribute HR Information
Capture and securely distribute electronic data such as pay stubs, corporate announcements, manuals, health and safety data, etc.

FileNexus® Web Forms For Staff & Management

FileNexus® can easily generate custom web forms that capture, create and track documents from any web browser. Staff and management can simply fill out a FileNexus® Web Form for things like timesheets, vacation requests, performance assessments, annual reviews, and questionnaires for anything like *rate our service* assessments, AGM assessments, employee satisfaction*, rate your boss*, etc.

"We would like to see FileNexus® in every department and on every desktop, and I know FileNexus® will take us there."- Nadine Witt, Systems Manager – Employee Data Systems, East Baton Rouge Parish Schools

PURCHASING

Automatically Capture, Track & Manage All Purchasing Records

FileNexus® can automatically archive and distribute purchase orders as they are generated, and tie all relevant records together, from receiving slips to vendor invoices, into automated workflow cycles. (See Accounts Payable in Finance section above).

FileNexus® Web Forms For Staff & Management

FileNexus® can easily generate custom web forms that capture, create and track documents from any web browser. Staff and Management can simply fill out a FileNexus® Web Form for things like purchase requisitions, procurement applications, new vendor registration, etc.

WHAT'S YOUR IDEA?

Do you need to automate a workflow process? Contact us today.

For More Information

To learn more about how FileNexus® can streamline your operations and improve your business efficiency, please contact:

       E: sales@loristech.com

Visit www.loristech.com for more details on how retailers use FileNexus® in their operations. You will also find other client profiles and more on FileNexus® and Loris Technologies Inc.