



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.

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.

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.

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).

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.

Proven Performance

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



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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.

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.

“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*



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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.

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.

“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*

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.



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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.

Web Portal Access For Franchisees

Allow franchisees secure access to their own information through a self-serve portal.

“It just saves our 200 retail partners time and energy.”

*Lee Fortney, IT Director
ICI Canada*

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.

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.

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.

“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*



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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.

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.

“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.*

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:

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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.