Today's Agenda

Why Do People Choose Square 9?

Product Introduction

Questions & More Information

Why Square 9?

Experience a partner focused on delivering new and innovative products, providing reliable and prompt service, and continuously evolving to meet customer business needs.

2/20
Innovation

2 major product releases with over 20 enhancements per year

<7 min
Support

Average customer support response time is under 7 min.

96.4%
Satisfaction

96.4% overall customer retention and contract renewal rate

>13000
Scalability

13,000 customers from small business to enterprise

Core Values

A Commitment to Process Improvement

Greater Efficiency leads to Productivity and Profitability

Supporting An Evolving World of Business

A Continuous Focus on Product Development

The Square 9 Product Suite

"Indeed, between its standard and optional capabilities, GlobalSearch can meet the full gamut of document management needs. From capture and routing, to OCR, to user and completely automated workflows."

- Buyers Laboratory International

GlobalCapture®

GlobalSearch®

GlobalAction®

GlobalForms®

Integrated Solutions

Award Winning Products

GlobalSearch Recognized With 2018 BLI's Top Rating

BuyersLab PLATINUM TESTED SOLUTION 2018

Category	Rating
Overall Product Rating	★★★★★
Features & Productivity	★★★★★
Usability	★★★★★
IT Admin & Security	★★★★★
Support & Training	★★★★★
Value	★★★★★

✓ **Anytime, Anywhere Access**

✓ **Flexibility**

✓ **Automated Information Onboarding**

✓ **Robust Scanning Options**

✓ **Document Retrieval**

✓ **Easy Document Sharing**

GlobalCapture®

Transforming Information into Business Intelligence

With GlobalCapture's web interface, there's no clients to install, making GlobalCapture a product that's easy to use and support.

Designed to grow with your business, GlobalCapture provides the flexibility to purchase for your current needs, plus the confidence to add functionality for unanticipated changes in necessities down the road.

Whether you're looking to capture a few thousand pages a month or hundreds of thousands, GlobalCapture allows you to increase your processing throughput and add functionality or users in a cost-effective manner.

Designed, implemented and supported from anywhere, at any time, through any modern browser, GlobalCapture has a visual end-to-end designer, which makes building out processes easier than ever.

The Path to Increased Organizational Efficiency

Capture

Providing the flexibility to gather document information from virtually any source.

- Multifunctional printer
- Desktop Scanner
- Email server
- Watched network directory

Classify

Use forms recognition to automatically classify and capture your documents.

With RapidAdapt® Learning, new forms can be created on the fly for ongoing training of the capture process.

Extract

Extract high-value data from your documents through an array of powerful tools, including:

- Optical Character Recognition (OCR)
- Barcode Recognition
- Database lookups

Validate

Checking the integrity of your information before it's released downstream is critical to any type of process automation.

- OCR confidence reporting
- Validation checks
- Data type mismatches

Route

Route your documents automatically to a network location or create a new folder based on extracted data.

With automated email notifications, your users will be kept in the loop upon their arrival.

Release

GlobalCapture can also release your documents to almost any document management solution, including:

- File share
- ECM Platform
- GlobalSearch

GlobalSearch®

Eliminate Inefficient Paper Processes and Streamline Business Workflow

Get Connected
As a true cross platform application, GlobalSearch supports Internet Explorer, Chrome, Safari, and Firefox allowing full access from any mobile device.

Extend Your Access
Enjoy untethered access to your documents no matter where you are in the world with a secure connection to your most critical business content.

Keep Things Moving
Need to approve an invoice or review a contract, on the go? With GlobalSearch you have total workflow functionality including automated routings, notifications, escalations and much more.

GlobalSearch® C2

Cloud Hosted Enterprise Content Management

Scan directly to GlobalSearch C2 through secure FTP or leverage the power of GlobalCapture to create capture workflows, automating your scan processes from the MFP.

GlobalSearch C2 provides secure access to business content through desktop or mobile devices, delivering flexibility in performance to keep your business moving forward.

Work with your documents faster and more easily than with hard copies. Navigate through pages, adjust orientation, edit index data, add an annotation or apply signatures in seconds.

Leverages the power of Amazon Web Services - the same platform used by SalesForce.com, SAP and many other SaaS Providers to host your critical data.

GlobalAction®

Keep Information Moving Throughout Your Entire Organization

A web-based graphical presentation of your document makes it easy to create, troubleshoot or revise a workflow activity anytime, from anywhere.

Insert a web form into any workflow, creating a link to an eForm, where users can seamlessly enter information. A PDF record of the completed form is automatically documented.

With GlobalAction, you can send automatic email reminders to users once a day, once an hour or once a minute based on your schedule.

GlobalAnalytics adds business intelligence to your workflows by providing on demand management reporting on document driven processes.

GlobalForms®

Improve Business Flexibility with Workflow Driven eForms

With its web-based platform, simply drag and drop form field elements (text boxes, drop downs, images etc.) on to the design page for easy form creation.

Build rules and logic into forms that dynamically change the layout based on selections made, ensuring required data has been provided before form submission.

Database connectors enable fields to be auto-filled based on a key piece of data, allowing database transactions to be updated when a form is submitted.

PDF documents can be indexed to an ECM platform, automatically routing for approval, notifying users of required action and saved for future reference.

Integrated Solutions

Streamline Processes and Automate Workflows Between Programs

Reduce Costs
Reduce significant labor time and costs, including matching and coding invoices.

Manage Information
Sync specific data from your CRM platform to manage critical, business specific information.

Streamline Processes
Integrated database lookups streamline indexing processes and document retrieval.

Easily Integrate
Immediately send documents directly from GlobalSearch to existing programs.

Common Business Applications

GlobalSearch has the ability to securely integrate with an extensive list of business applications, office equipment and third-party software

As paper documents are received, they can easily be sent directly to Salesforce.com, calling core web scanning capability to retrieve on screen account information for indexing.

Square 9's Quickbooks Connections provides seamless integration allowing users to create bills, route invoices and distribute documents from GlobalSearch.

Automatically pull vendor names, account charts, general ledger codes and other data to streamline data capture and indexing through GlobalSearch and Microsoft Dynamics integration.

Square 9 Pre-Sales and Post Sales Support

A World of Difference

Professional Services

Our Professional Services teams are geared to provide a higher level of proficiency in system design and delivery.

Support

Our Product Support teams are trained to deliver technical expertise with an unparalleled level of responsiveness.

Partners

Square 9 and our partners help organizations to meet the challenges in today's global economy.

Questions or More Information?

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