



YOUR DIGITAL TRANSFORMATION CONSULTANTS

IMAGETRUST *for* SALESFORCE

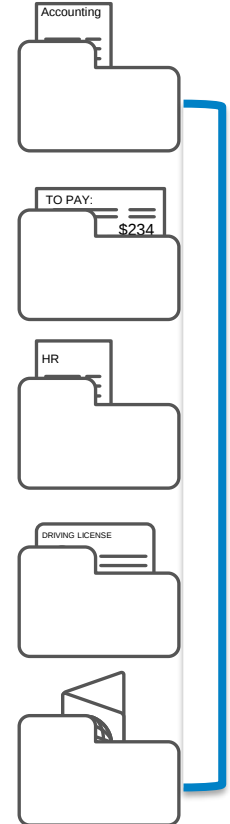
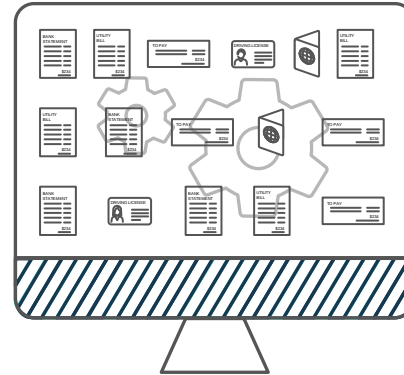
Provides a native Document Intelligence integration within your Salesforce environment; allowing the ability to leverage the latest emerging Artificial Intelligence (AI), computer vision (CV), machine learning (ML), and Robotic Process Automation (RPA) tools.





Reduce labor costs and increase automation with automatic document separation, classification, and extraction.

- ✓ With ImageTrust, customers now have the choice of cloud engines for extraction and indexing, dependent upon document type, to ensure the best results are delivered



Content Collection from anywhere, on any device

Open Intelligence

Open AI for guaranteed extraction accuracy



Content Collection

Frictionless content capture and indexing



Strong Encryption

Data encrypted in transit and at rest



Content Collection

Automate content-centric business processes



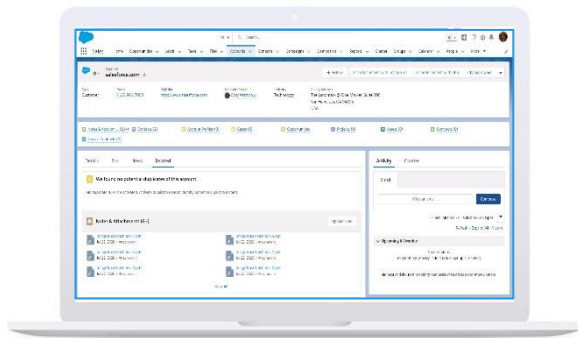
Scalability

Easily scalable enterprise content capture and management



Integrated

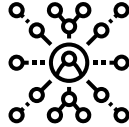
Enterprise Class integrations to all leading content services platforms



Production Capture for Salesforce



Fully browser based intelligent capture eliminating the need for workstation software installs, eliminating the IT burden throughout install and upgrades.



True enterprise cloud capture that's built to scale – Requires no servers to support your growing challenges and needs.



Simple user interface despite being packed with features and functionalities requested by customers. (Very little end user training required)



Built with the enterprise in mind – ability to drive any device with tight integrations into Salesforce. All data is encrypted in transit and at rest to ensure compliance with all security regulations.



ImageTrust Batch Capture is available to **address every use case** from high volume centralized scanning to embeddable distributed applications.



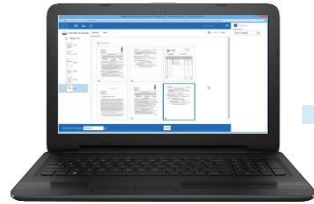
True zero footprint scanning (ZFS) with network attachable scanners and ImageTrust for Salesforce



Transactional Capture Workflow

Embedded Capture

Automated Document
Identification



Read

Intelligent Data
Extraction

Review

Customized Exception
Handling

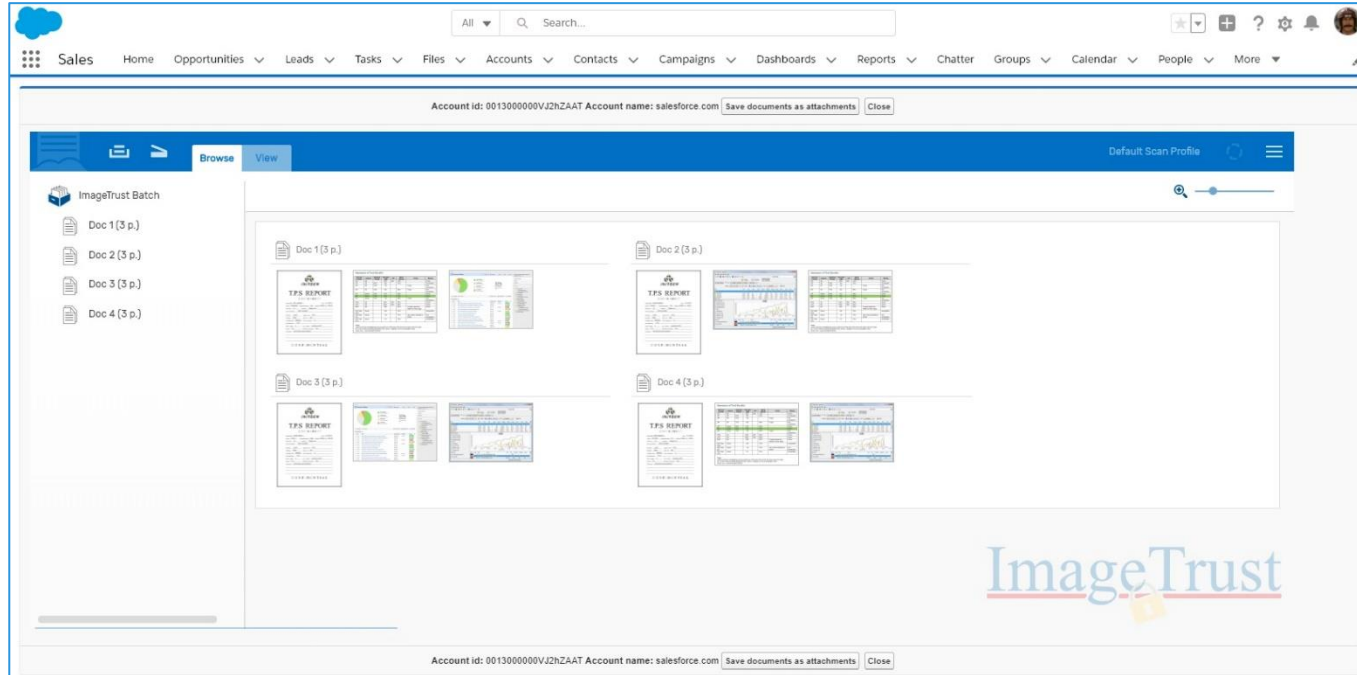
Transform

Data Validation and
Enrichment



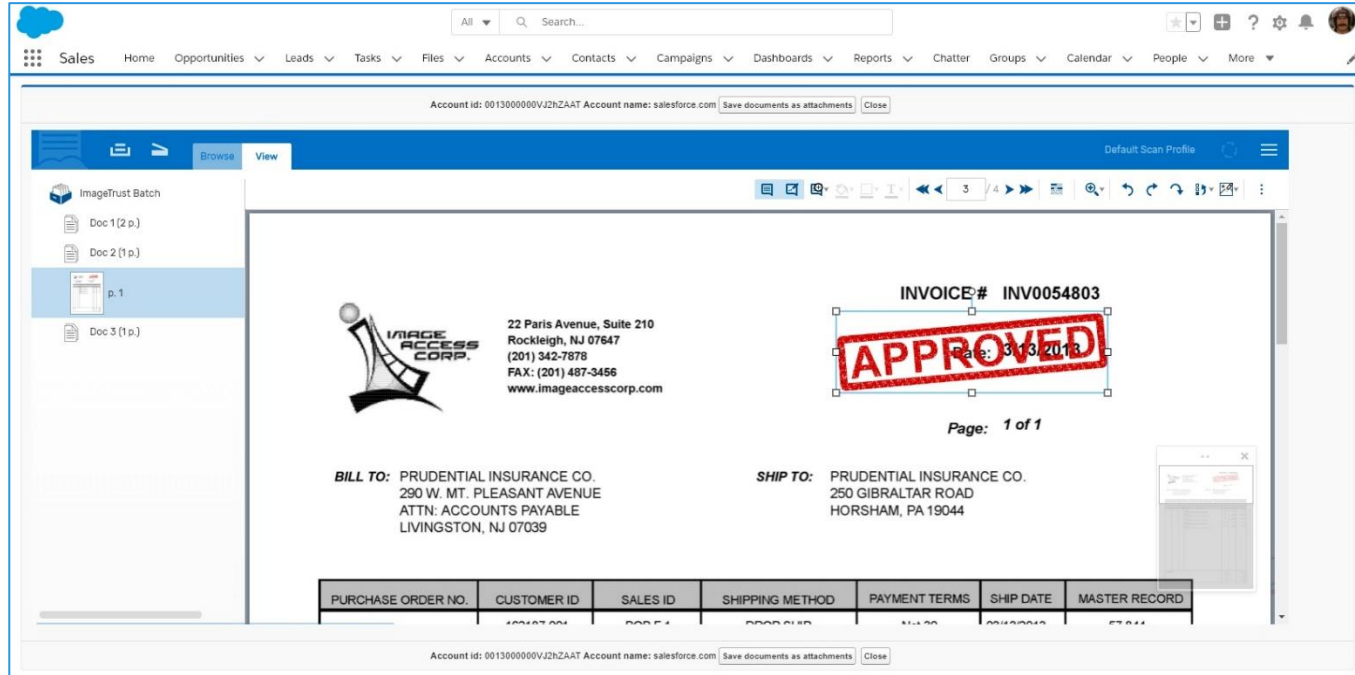
Store, Retrieve,
Collaborate

Multiple document capture and assembly



- ✓ Scan or drag and drop one to many documents in a single transaction
- ✓ Manually split and move around as needed. Or add additional automation capabilities through AI integrations

Ad-hoc annotation and redact



The screenshot displays the ImageTrust software interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', 'People', and 'More'. The main workspace shows an invoice for 'IMAGE ACCESS CORP.' with the following details:

INVOICE # INV0054803
Date: 3/13/2013
Page: 1 of 1

22 Paris Avenue, Suite 210
Rockleigh, NJ 07647
(201) 342-7878
FAX: (201) 487-3456
www.imageaccesscorp.com

BILL TO: PRUDENTIAL INSURANCE CO.
 290 W. MT. PLEASANT AVENUE
 ATTN: ACCOUNTS PAYABLE
 LIVINGSTON, NJ 07039

SHIP TO: PRUDENTIAL INSURANCE CO.
 250 GIBRALTAR ROAD
 HORSHAM, PA 19044

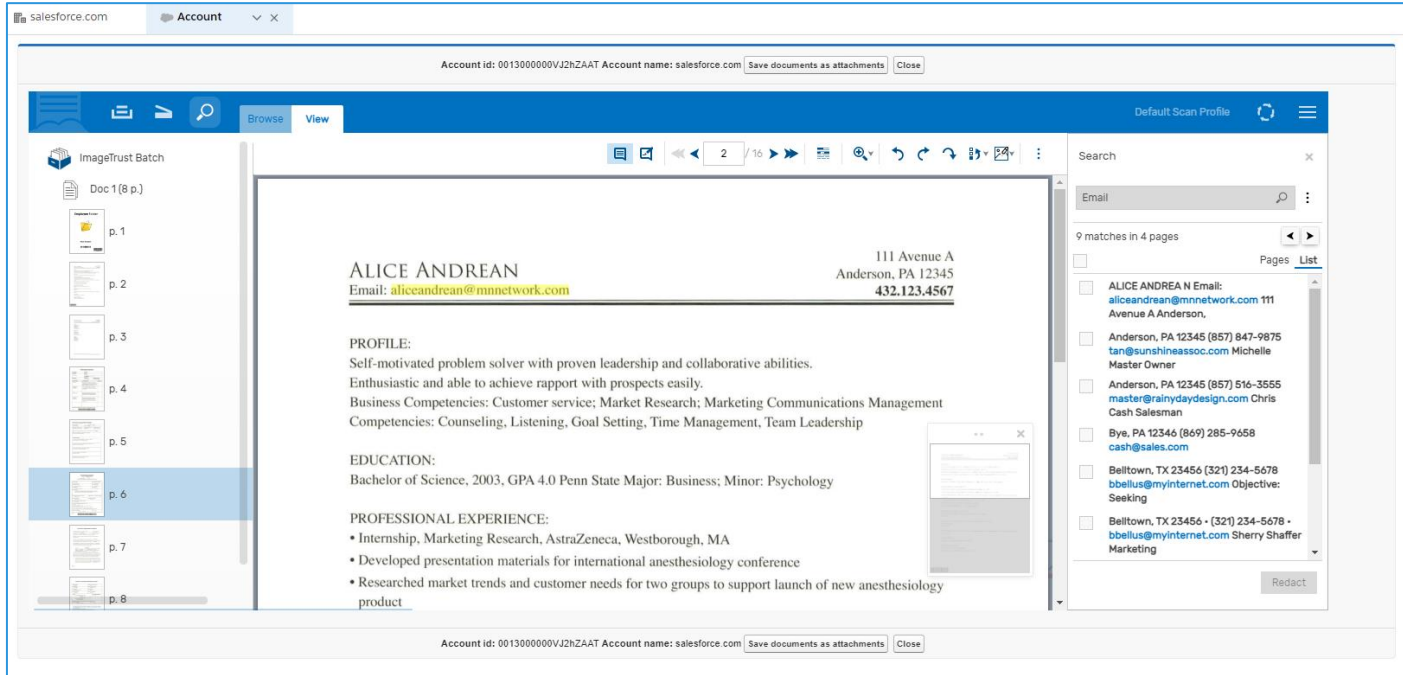
A red 'APPROVED' stamp is placed over the invoice details. The stamp is rectangular with a red border and the word 'APPROVED' in bold, black, uppercase letters. The date '3/13/2013' is visible within the stamp.

At the bottom of the invoice, there is a table with the following columns:

PURCHASE ORDER NO.	CUSTOMER ID	SALES ID	SHIPPING METHOD	PAYMENT TERMS	SHIP DATE	MASTER RECORD

- ✓ Use the Annotation pallet to add additional mark-ups for downstream approvals and processing

OCR aided redaction – search by words or regular expressions

The screenshot shows the ImageTrust Batch web application interface. On the left, a sidebar lists document pages from p. 1 to p. 8, with p. 6 highlighted. The main area displays a resume for Alice Andreadan, including contact information, profile, education, and professional experience. A search panel on the right shows 9 matches across 4 pages, with a list of results including email addresses and phone numbers. A 'Redact' button is visible at the bottom of the search panel. The interface includes a top navigation bar with 'Browse' and 'View' tabs, and a bottom status bar with account information and a 'Save documents as attachments' button.

salesforce.com Account Account id: 001300000VJ2hZAAT Account name: salesforce.com Save documents as attachments Close

ImageTrust Batch

Doc 1 (8 p.)

p. 1

p. 2

p. 3

p. 4

p. 5

p. 6

p. 7

p. 8

ALICE ANDREADAN

111 Avenue A
Anderson, PA 12345
432.123.4567

Email: aliceandreadan@mnnetwork.com

PROFILE:

Self-motivated problem solver with proven leadership and collaborative abilities.
Enthusiastic and able to achieve rapport with prospects easily.
Business Competencies: Customer service; Market Research; Marketing Communications Management
Competencies: Counseling, Listening, Goal Setting, Time Management, Team Leadership

EDUCATION:

Bachelor of Science, 2003, GPA 4.0 Penn State Major: Business; Minor: Psychology

PROFESSIONAL EXPERIENCE:

- Internship, Marketing Research, AstraZeneca, Westborough, MA
- Developed presentation materials for international anesthesiology conference
- Researched market trends and customer needs for two groups to support launch of new anesthesiology product

Search

Email

9 matches in 4 pages

Pages: [List](#)

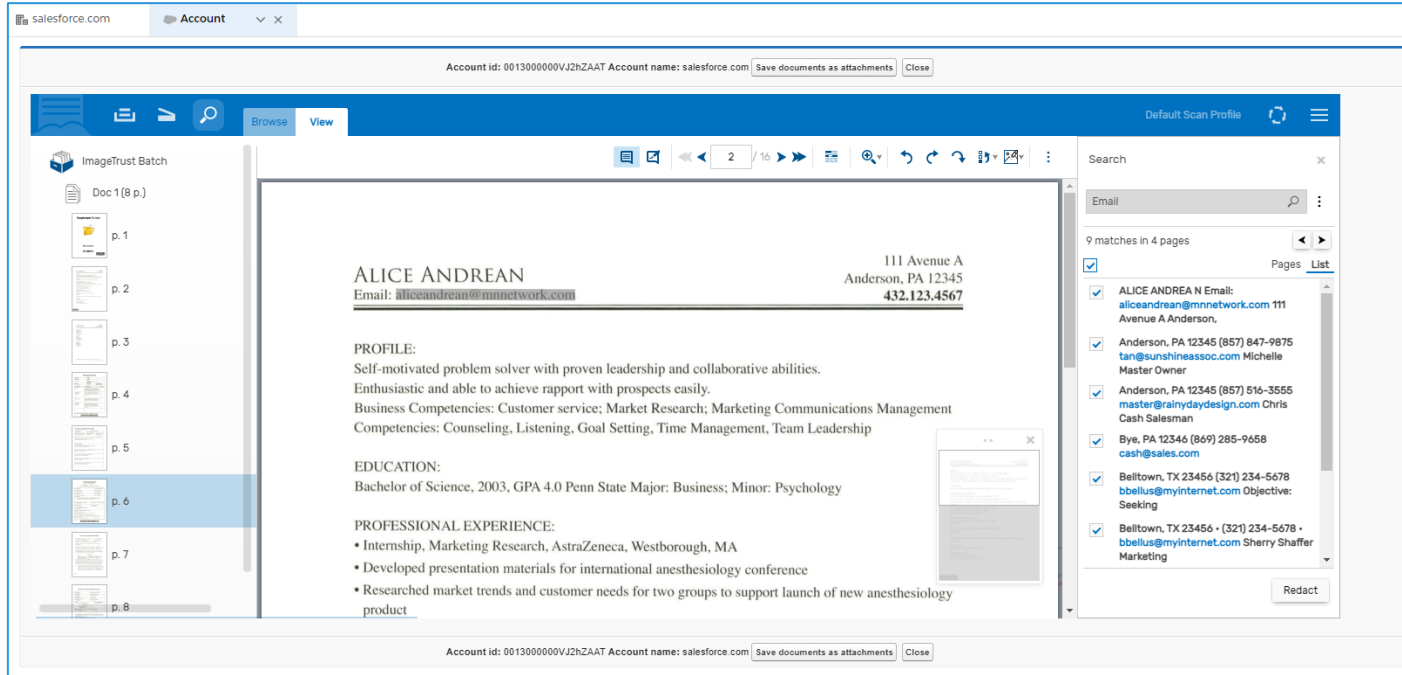
- ☐ ALICE ANDREADAN Email: aliceandreadan@mnnetwork.com 111 Avenue A Anderson,
- ☐ Anderson, PA 12345 (857) 847-9875 tan@sunshineassoc.com Michelle Master Owner
- ☐ Anderson, PA 12345 (857) 516-3555 master@rainydaydesign.com Chris Cash Salesman
- ☐ Bye, PA 12346 (869) 285-9658 cash@sales.com
- ☐ Belltown, TX 23456 (321) 234-5678 bbeilus@myinternet.com Objective: Seeking
- ☐ Belltown, TX 23456 - (321) 234-5678 • bbeilus@myinternet.com Sherry Shaffer Marketing

Redact

Account id: 001300000VJ2hZAAT Account name: salesforce.com Save documents as attachments Close

✓ Take advantage of OCR capabilities to easily redact sensitive data from your documents

OCR aided redaction – see results real time in a list view...

The screenshot shows the ImageTrust web application interface. On the left, a sidebar displays a document batch named 'Doc 1 (8 p.)' with thumbnails for pages 1 through 8. Page 6 is currently selected. The main area shows the OCR text of page 6, which is a resume for Alice Andrian. The resume includes contact information, a profile, education, and professional experience. On the right, a search results panel is open, showing 9 matches in 4 pages. The first match is selected, showing the full resume text. The interface includes a top navigation bar with 'Account' and 'View' tabs, and a bottom status bar with account details and a 'Save documents as attachments' button.

salesforce.com Account Account id: 0013000000VJ2hZAAT Account name: salesforce.com Save documents as attachments Close

ImageTrust Batch Doc 1 (8 p.) p. 1 p. 2 p. 3 p. 4 p. 5 p. 6 p. 7 p. 8

ALICE ANDRIAN
Email: aliceandrian@mnnetwork.com
111 Avenue A
Anderson, PA 12345
432.123.4567

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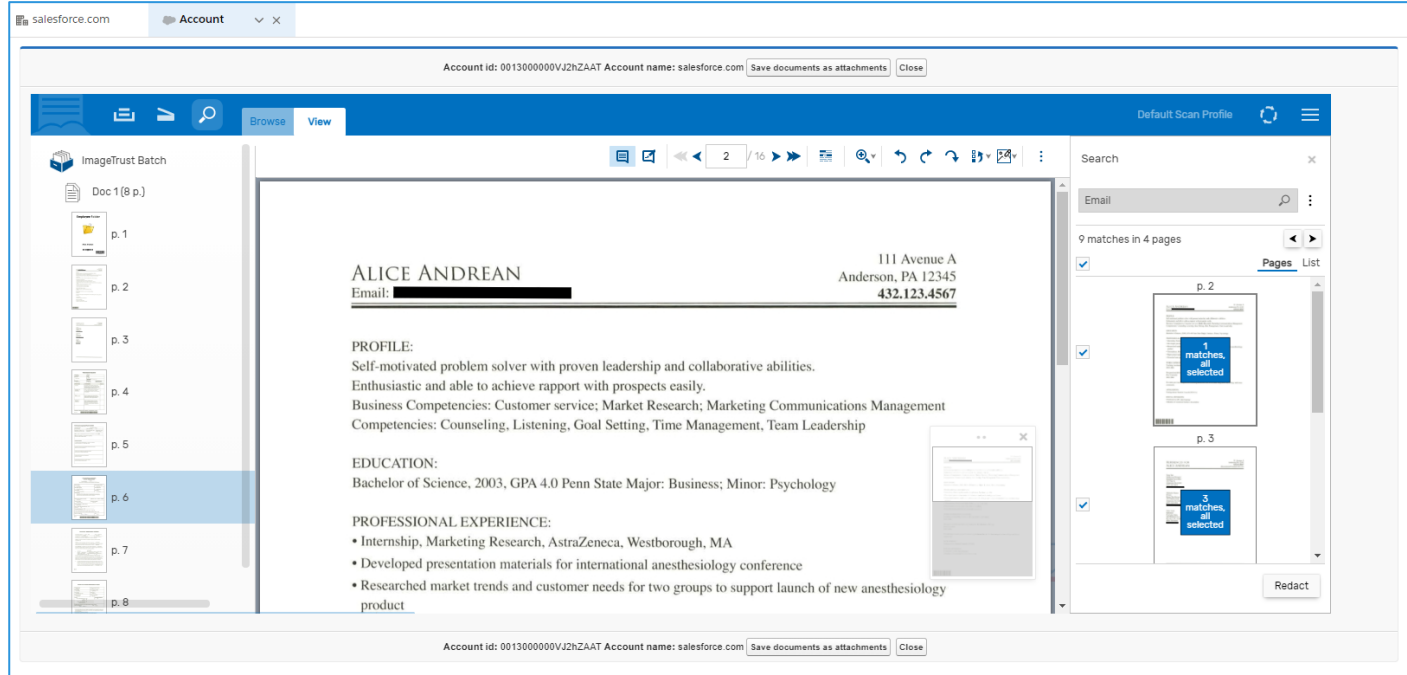
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9 matches in 4 pages
Pages List
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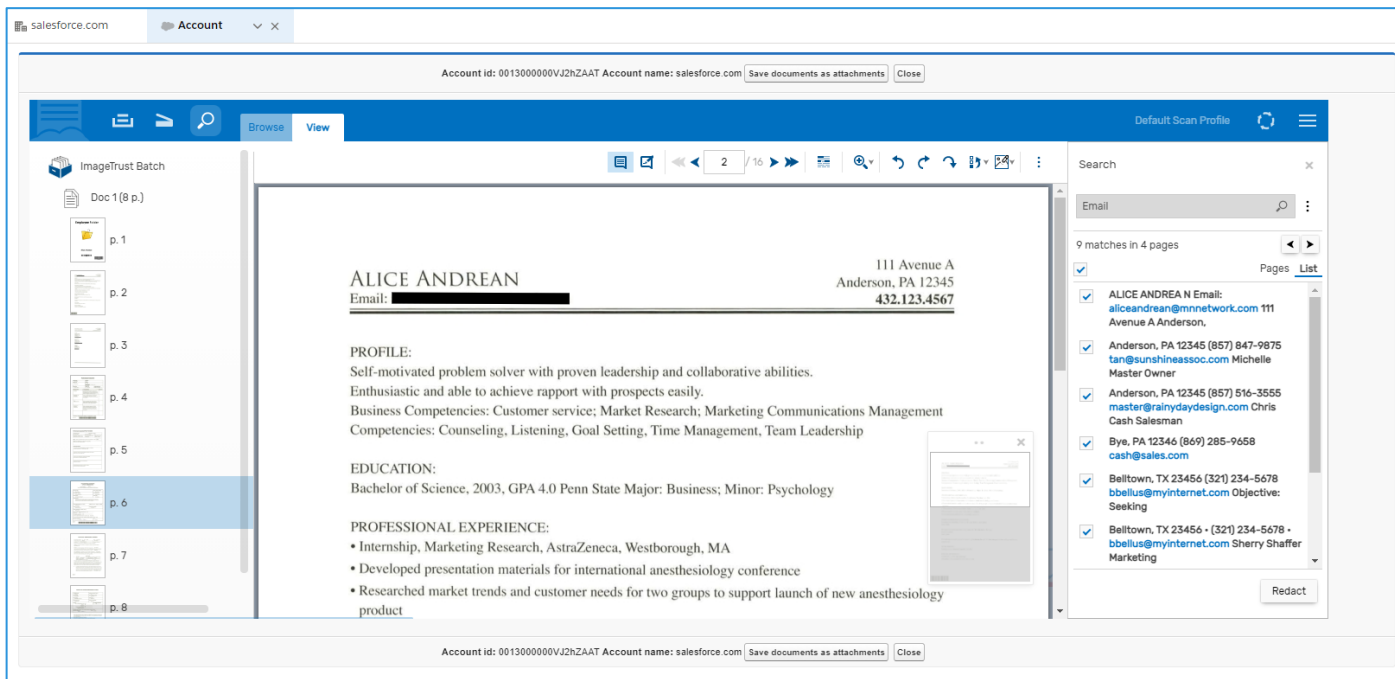
✓ Choose one, a few, or all results that match your search criteria...and see the results live

OCR aided redaction – see results real time in a page view...

A screenshot of the ImageTrust web application interface for OCR-aided redaction. The interface is divided into several sections. On the left, a sidebar shows a document titled 'Doc 1 (8 p.)' with thumbnails for pages p. 1 through p. 8; p. 6 is currently selected and highlighted. The main central area displays the content of page 6, which includes contact information for 'ALICE ANDREAN' (address: 111 Avenue A, Anderson, PA 12345, phone: 432.123.4567), a profile description, business competencies, education details (Bachelor of Science from Penn State), and professional experience. On the right side, a search panel is open, showing '9 matches in 4 pages'. It lists 'p. 2' with '1 matches, all selected' and 'p. 3' with '3 matches, all selected'. A 'Redact' button is located at the bottom of this panel. The top of the interface shows a browser tab for 'salesforce.com' and account information. The bottom of the interface also displays account details and options to 'Save documents as attachments' or 'Close'.

- ✓ Select the option to see the live results on a page view versus list view

OCR aided redaction – select one to many to ALL the results, and redact permanently

The screenshot shows the ImageTrust Batch web application interface. On the left, a sidebar lists document pages from 'Doc 1 (8 p.)', with page 6 selected. The main area displays the text of page 6, which is a resume for Alice Andread. The resume includes contact information, a profile, education, and professional experience. A search bar at the top right of the main area is active, showing 9 matches in 4 pages. A list of search results is displayed on the right, with each result checked. At the bottom right of the search results, there is a 'Redact' button. The interface also includes a top navigation bar with 'Browse' and 'View' tabs, and a bottom status bar with account information and document management options.

Account id: 0013000000VJ2hZAAT Account name: salesforce.com Save documents as attachments Close

ImageTrust Batch

Doc 1 (8 p.)

p. 1

p. 2

p. 3

p. 4

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ALICE ANDREAD

111 Avenue A
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EMAIL: [REDACTED]

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Pages List

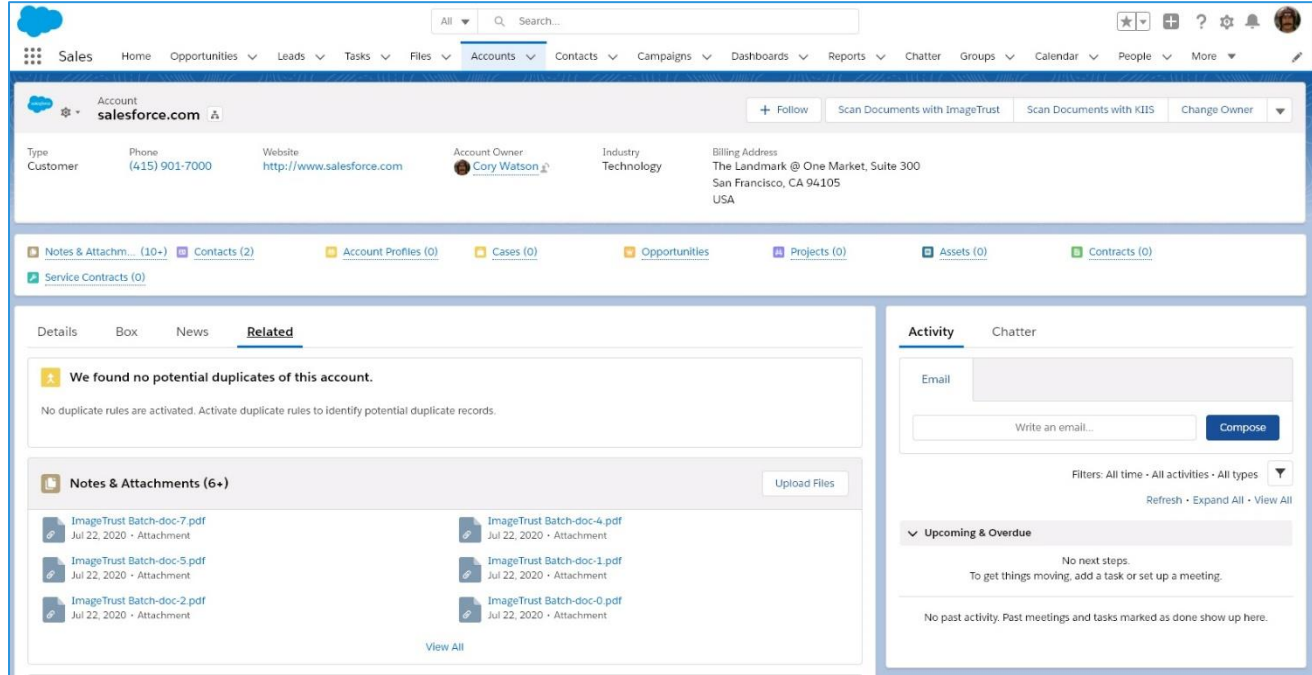
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- ☒ Belltown, TX 23456 • (321) 234-5678 • bbellus@myinternet.com Sherry Shaffer Marketing

Redact

Account id: 0013000000VJ2hZAAT Account name: salesforce.com Save documents as attachments Close

✓ When you're ready, "burn" in the redactions. Do this multiple times for different words and phrases

View existing and uploaded documents

A screenshot of a Salesforce account page for 'salesforce.com'. The page shows account details like 'Type: Customer', 'Phone: (415) 901-7000', 'Website: http://www.salesforce.com', 'Account Owner: Cory Watson', 'Industry: Technology', and 'Billing Address: The Landmark @ One Market, Suite 300, San Francisco, CA 94105, USA'. Below this is a row of tabs for 'Notes & Attachments (10+)', 'Contacts (2)', 'Account Profiles (0)', 'Cases (0)', 'Opportunities', 'Projects (0)', 'Assets (0)', and 'Contracts (0)'. The 'Related' tab is selected, showing a message: 'We found no potential duplicates of this account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' Below this is a section for 'Notes & Attachments (6+)' with an 'Upload Files' button. It displays six PDF attachments, all named 'ImageTrust Batch-doc-7.pdf' through 'ImageTrust Batch-doc-0.pdf', dated 'Jul 22, 2020 - Attachment'. A 'View All' link is at the bottom. On the right, the 'Activity' tab is selected, showing an email composition area and a section for 'Upcoming & Overdue' with a message: 'No next steps. To get things moving, add a task or set up a meeting. No past activity. Past meetings and tasks marked as done show up here.'

- ✓ See the documents for each Salesforce record
- ✓ Select your documents to review and edit as required with ImageTrust
- ✓ Add more documents to your Salesforce records



Combining flexible capture with modern content services

Legacy enterprise capture

- ✗ Accessed outside the line of business
- ✗ Minimal workflow automation
- ✗ Priced on a page volume basis
- ✗ Thick-client – application is installed on PC
- ✗ Locked into legacy OCR/ICR engine
- ✗ Limited Scalability w/ high costs
- ✗ Expensive to upgrade / Difficult to setup

ImageTrust

- ✓ Embedded directly where you work
- ✓ Drives efficiency with access to critical content
- ✓ Concurrent licensing structure w/ no restrictions
- ✓ Thin-client – application runs in web browser
- ✓ Can process unlimited images annually
- ✓ Integrates with latest CV/ML extraction engines
- ✓ Little-to-no lift from IT / Easy implementation

ITSalesforce@imageaccesscorp.com

