

## Intelligent Document Management for Professional Services Industry



- Search entire documents or forms with unstructured data
- Enjoy quick and easy forensic level search functionality
- Find files uploaded by individual, departments, date or file type – anywhere and anytime



- Store your data in our private cloud and access files via a secure, encrypted connection
- Benefit from built-in permission levels for confidential information
- Track all changes via our audit reporting



- Upload, search, view, preserve and download your company documents
- Get up and running the first day of installation
- Spread the benefits across many different cross-functional owners within your organization
- Leverage our APIs to integrate into your different systems and workflows

### Industry Challenges

Today, the Professional Service industry is wrestling with the needs of both records and content management for their internal use as well as supporting diverse and growing clients. The need for efficient software tools to enable file sharing, collaboration and online storage at the right cost structure are paramount to meeting their needs.

The Professional Services executives now, more than ever need tools that can quickly integrate with their existing systems (could be sales automation, hr., legal, regulatory as well as a host of digital and paper documents and forms) to produce great outcomes for their teams. The file sharing for unstructured data is essential as individuals and teams collaborate on creating new services and processes to satisfy their client needs in an ever changing environment. Another key element to the solution set needs to be security and quicker return on investments (teams are up and running in a day).

### The InfoPreserve Solution

That's why InfoPreserve has designed an intelligent document management solution that enables:

**Uploading** digital assets and documents quickly and efficiently for file sharing

**Searching** and **retrieving** documents with a single view into those digital assets for collaboration

**Preserving, integrating** and **exporting** documents

At InfoPreserve, we understand it may be difficult to implement a completely new solution, so we've designed one that can be incorporated into your existing systems and processes with ease. It's also flexible enough to grow with your organization over time.

Because our solution is based on a Software as a Service (SaaS) model, which means no upfront capital and information is stored in our secured private cloud, installation is simple and your users will be up and running in less than 24 hours.

Plus, our software comes complete with permission-based logic for your different users, as well as detailed reporting to support risk management and compliance requirements.

You'll have all the tools you need for document review and discovery. Our focus on record and content management aligns with the needs of your ever-expanding and changing role in professional services.

There's nothing more important than your critical data. We promise you'll see immediate value once you select a trusted document management solution from InfoPreserve.

### Manage Your Documents in the Cloud

Access Controls • Audit Trails • Retention Management • Content Authentication • Deletion Protection