

**KOFAX**

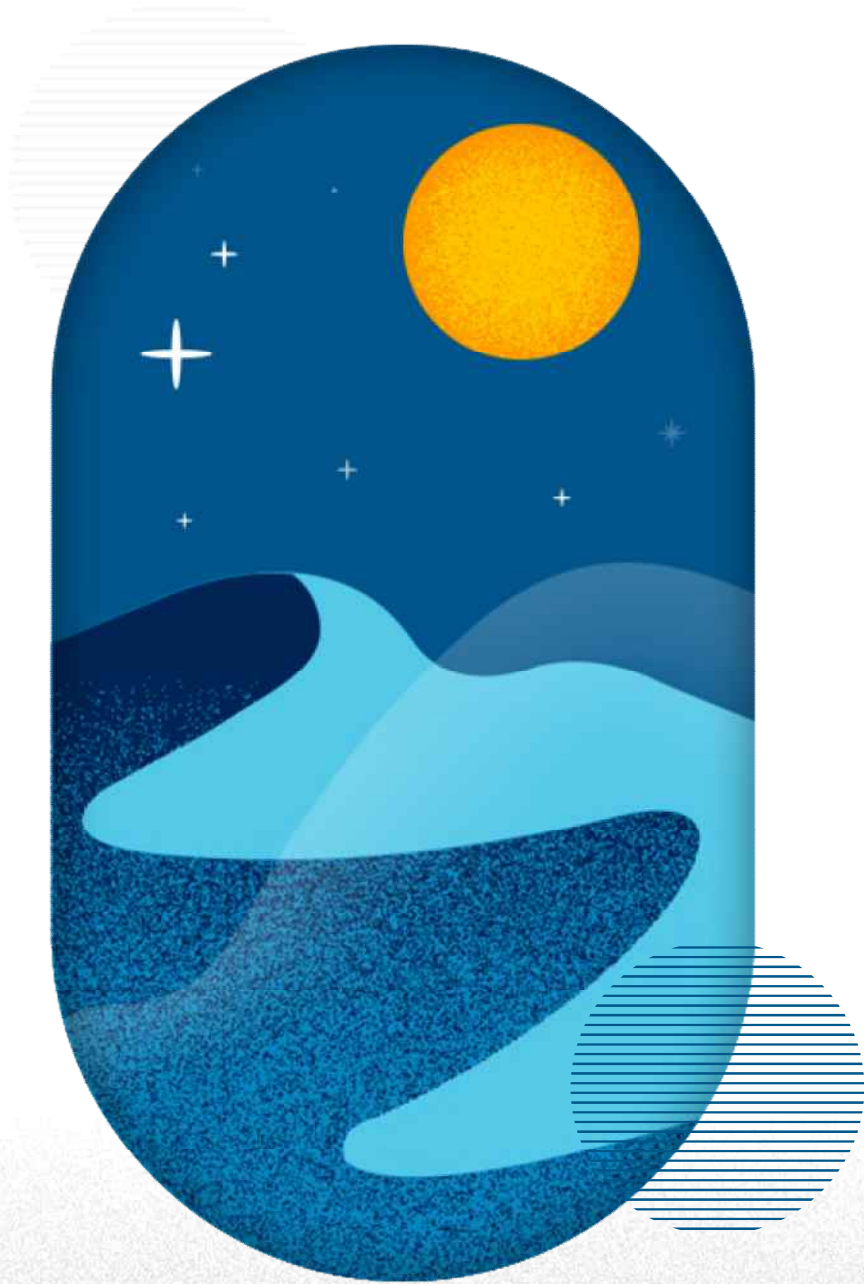
# Printix & ControlSuite

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**Ben Roberts**

Senior Sales Account Executive

**TICKET TO  
TOMORROW** <sup>GKO  
23</sup>



# The Evolution Continues

2017

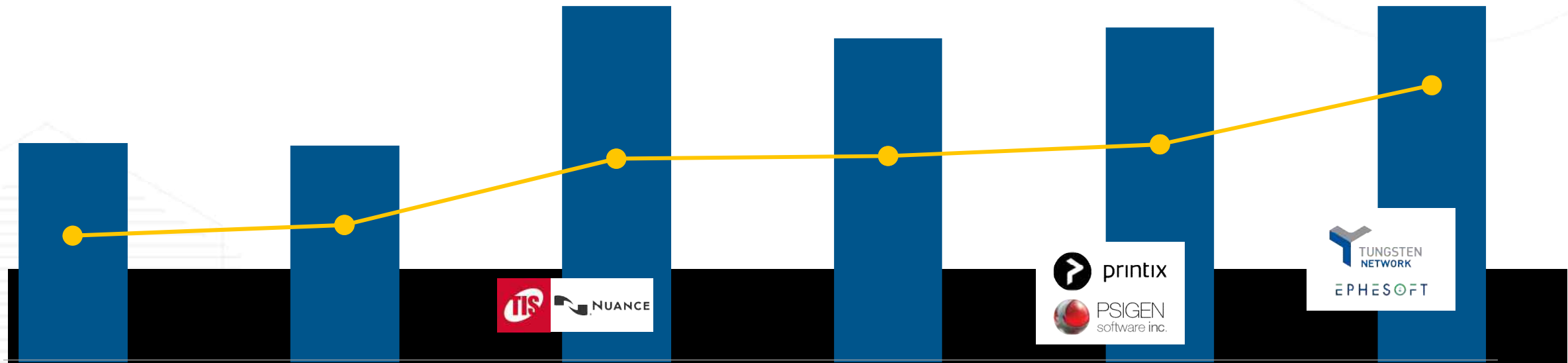
2018

2019

2020

2021

2022



Capture-Oriented On Prem Perpetual Sales

Pivoted to Platform & Ecosystem

Positioned as Intelligent Automation (IA)

Invested in Low-Code & Cloud / SaaS for Workflow Automation

Hard Pivot to Recurring Revenue & Launched CX

Focused on Cloud IA Platform & Ecosystem

● Recurring Revenue  
■ Revenue

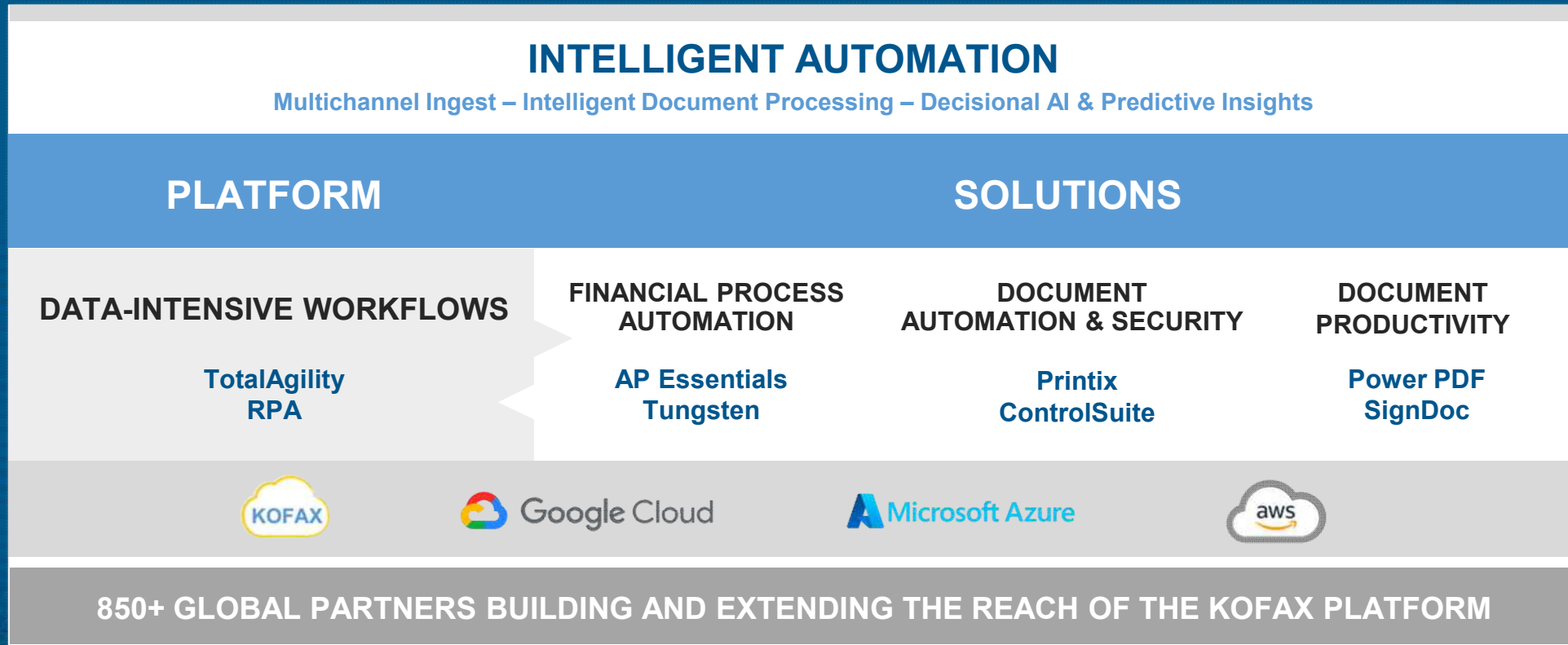


Market Message

**Kofax's Intelligent Automation Platform and Solutions**  
improve **business critical operations through actionable insights**  
and **data-intensive workflow automation.**

Market Positioning

Technology Portfolio

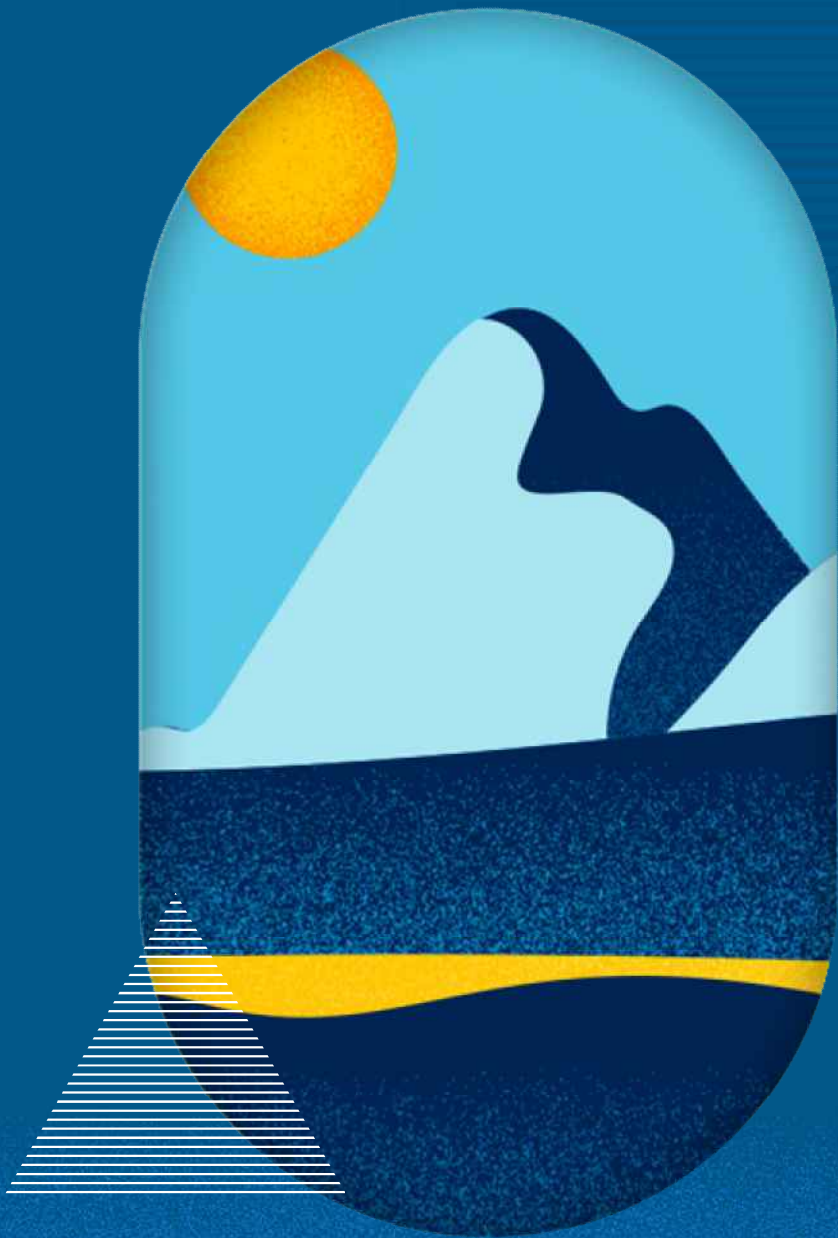


Cloud Choice

Ecosystem

**KOFAX**

**TICKET TO TOMORROW** <sup>GKO 23</sup>



# Printix

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Modern cloud print infrastructure



## What is Printix?

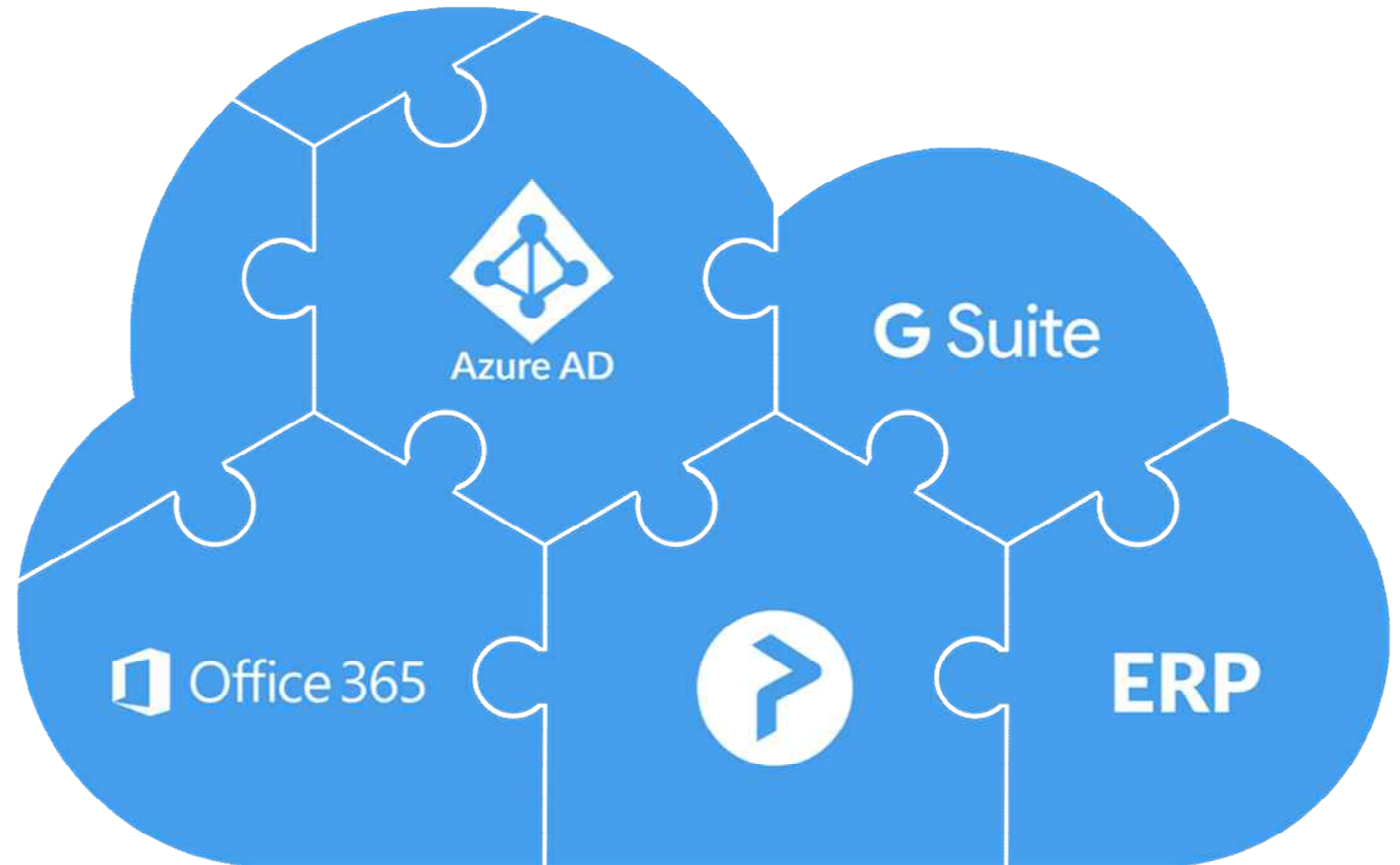
- A modern cloud-based print *infrastructure*

*Print from anything to anything whenever you want.*

- Remove on-prem cost, minimize administration and improve users' productivity
- A vertical product that fits any customer from 1 device in SMB to global organisation's of 1000+ devices
- A subscription service, per device per year

## ➤ Deep integration with Microsoft

- Azure Built
  - True SaaS
  - Kubernetes (K8s)
  - Redundancy
  - Multi-tenant
  - Automatic scaling
- Azure Supported
  - Azure AD SSO
  - Azure Blob Storage
  - Print jobs stay in your Azure tenant
- Also ties in with Google







# Modern Printing

- **Direct, Mobile, Home & Cloud Print**  
Windows, Mac, Chromebook, iOS & Android
- **Print Ready**  
Automatic location/group installed print queues
- **Global Secure Print**  
Mobile release (QR/NFC tag), any printer any model
- **Card-based Secure Print**  
Release jobs using proximity cards or ID code





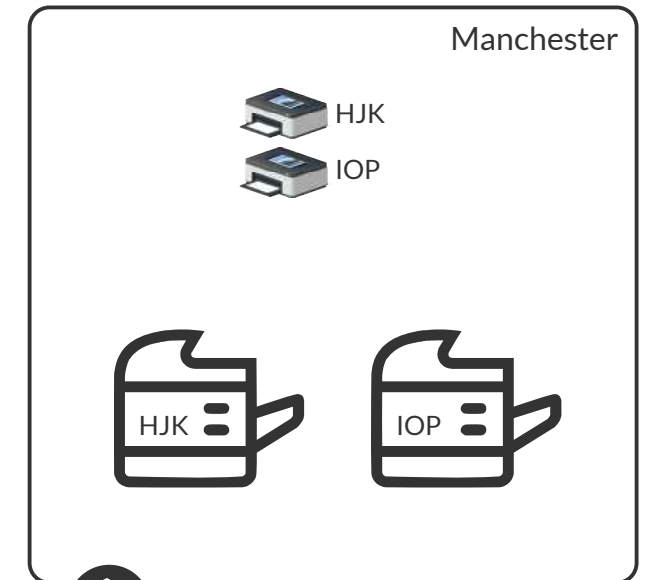
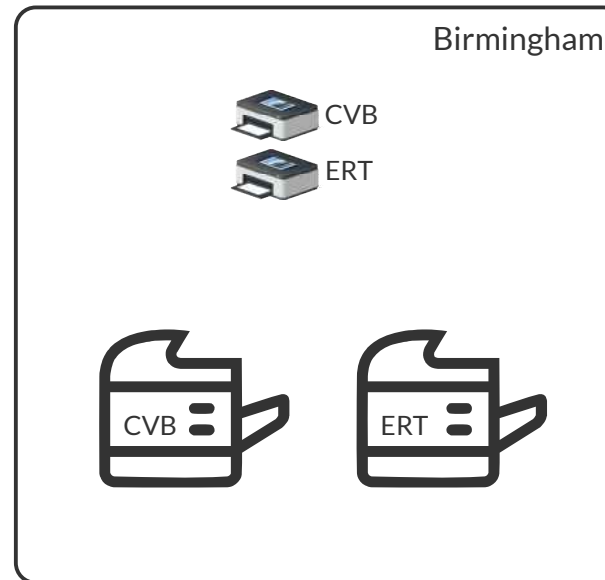
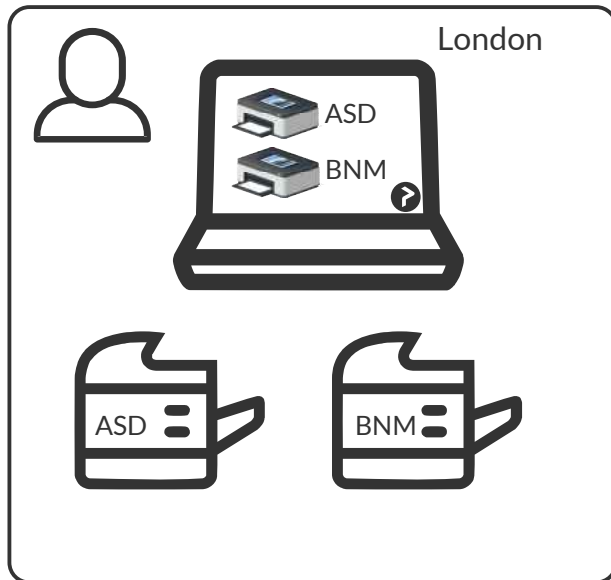
# Modern Management

- Easy Deployment **Endpoint Manager / MSI tools**
- Single Sign-On (**Azure AD & Google WS**)
- Usage reports with **Power BI**
- Support for **Azure AD Groups**
- **Complement or replace** Microsoft Universal Print with enhanced printing features
- Complement **ControlSuite** with BYOD and additional Hybrid Working



# Location Aware

The goal is that any user will always have the most meaningful printer installed in their operating system, automatically.



# ➤ Power BI - Analytics

- Printix Database
- Customer Database



## Settings

- Setup
- Secure print
- Printix Go
- Cloud storage
- Analytics**
- Mobile print
- Home office
- SNMP

### PRINTIX DATABASE

Active: **Yes**  
Last data extract: 5 hours ago

#### Database server address

printix-bi-data-2.database.windows.net

#### Database name

printix\_bi\_data\_2\_1

#### Database server port

1433

#### Database server host

184d1f89b9d5a97f721657

#### Database server user

printix4

Include document name in data extract

- Test
- Deactivate
- Delete

### OWN DATABASE

Active: No  
Last data extract: -

#### Database server address \*

Azure SQL Database

#### Database name \*

Database name

#### Database server port \*

Database server port

#### Username \*

bryan.walbridge@kofax.com

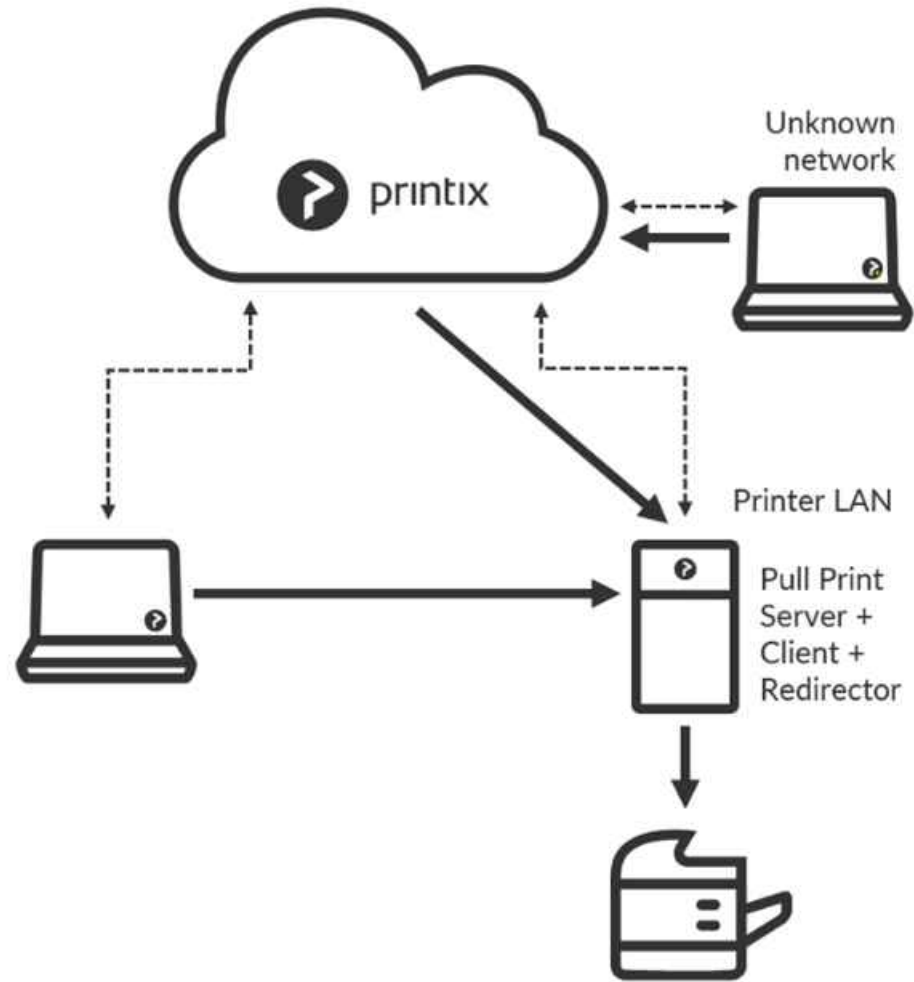
#### Password \*

\*\*\*\*\*

Include document name in data extract

- Create

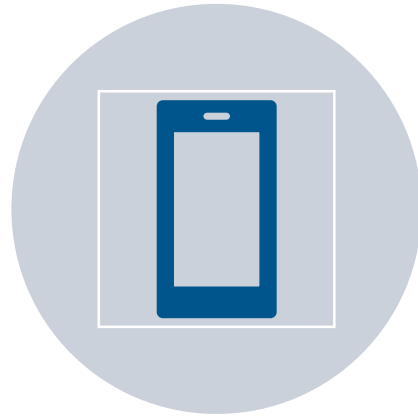
# ➤ Secure Release via 3<sup>rd</sup> Party Solution



# Release Methods



WEB RELEASE



APP RELEASE



PRINTIX GO



# Printix 2.0 on Kofax Cloud

Capture | Mobile | OCR | PDF | Word

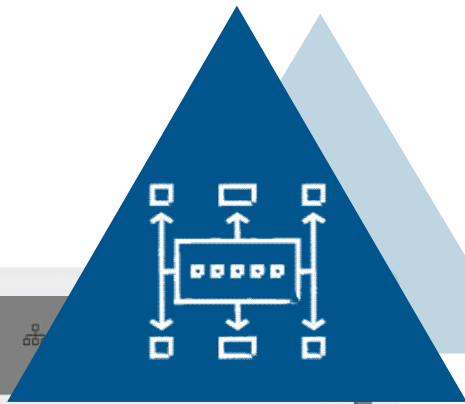


Support for 3 partners

# Printix 2.0: Capture



**Business Insights**



# Low-Code

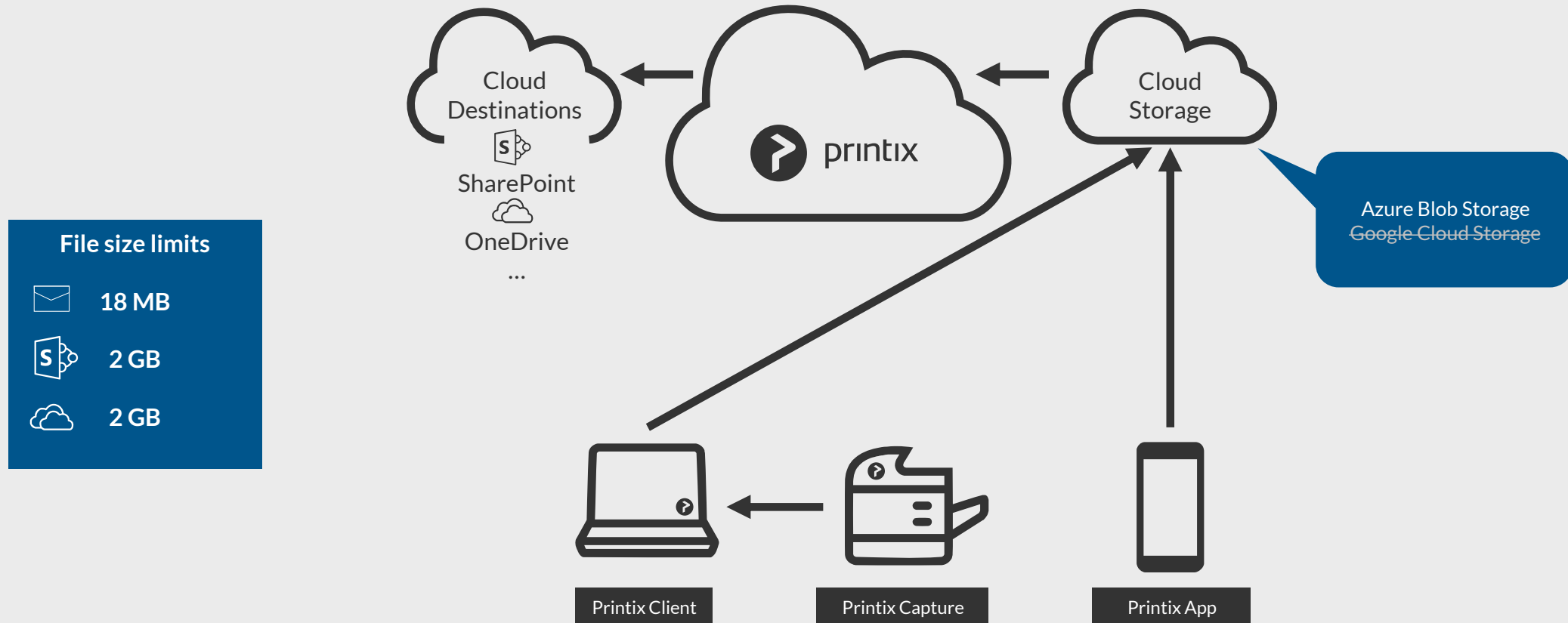


# Cloud

Variable	Date
{printer_id}	{mm_dd_yyyy}
{printer_location}	{mm_dd_yyyy_time}
{printer_name}	{dd_mm_yyyy}
{user_name}	{dd_mm_yyyy_time}
{workflow_name}	{yyyy_mm_dd}
	{yyyy_mm_dd_time}

*Select and paste variable in fields (folder, file name or subject)*

# Capture architecture

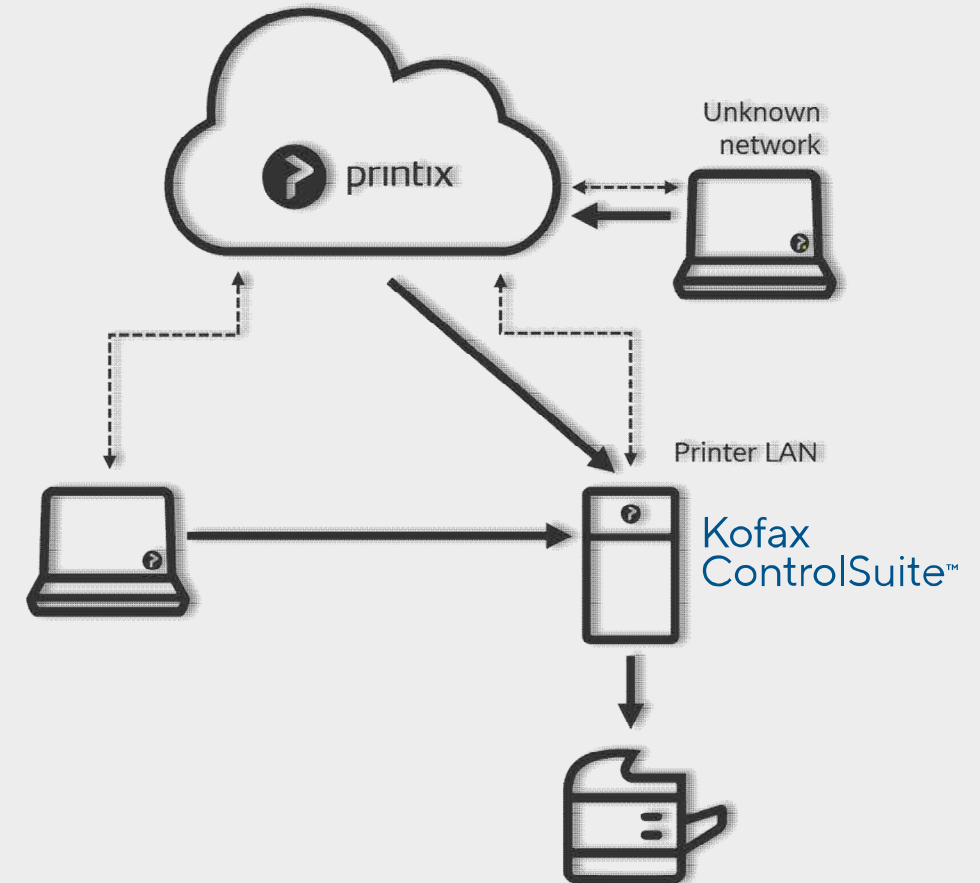


- Capture with Mobile requires properly configured Cross-origin Resource Sharing (CORS) rules to be setup for the used Azure Blob Storage.
- Google Cloud Storage is currently not supported.

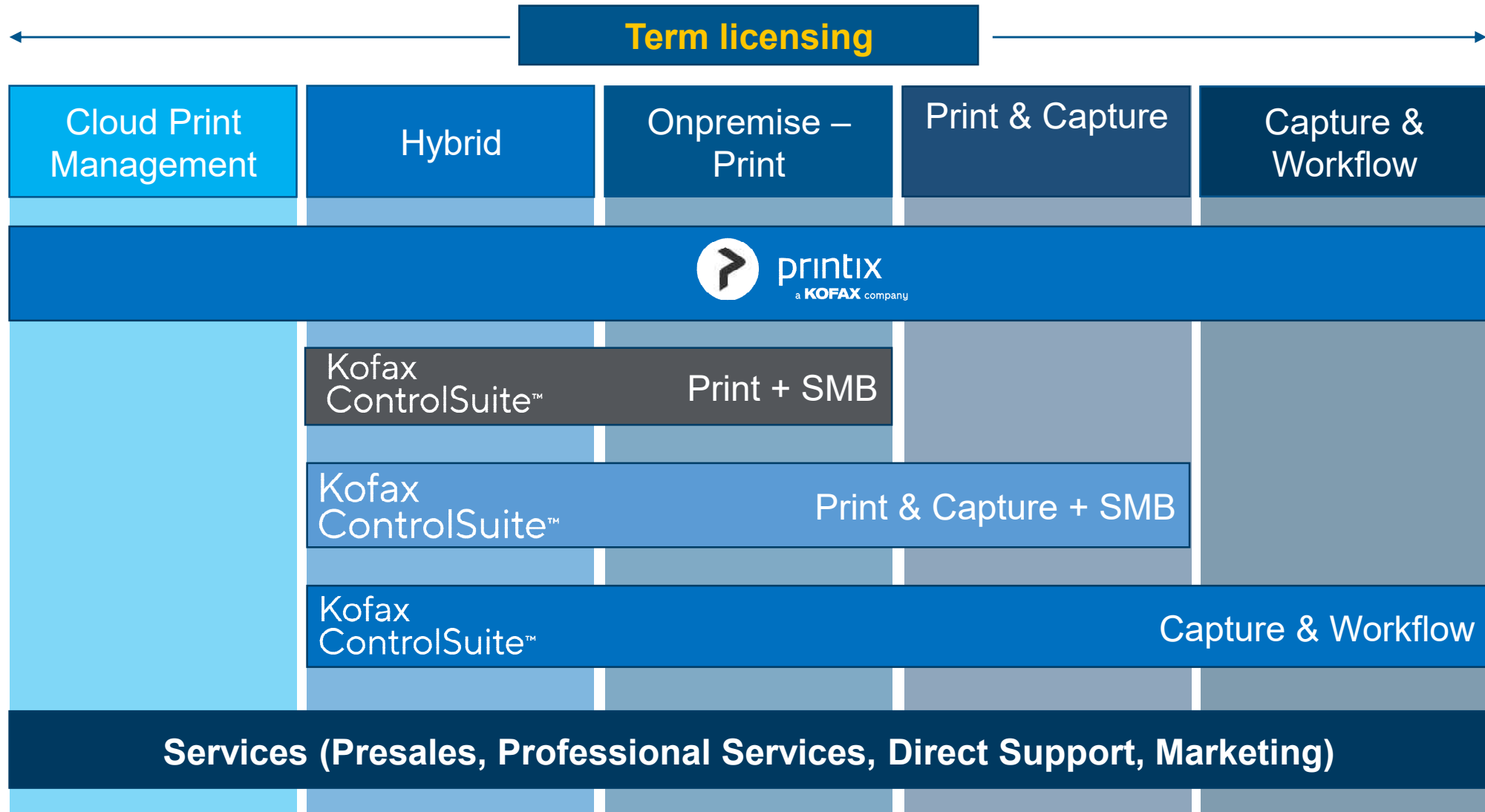


## ➤ Maximize Revenues and Increased Value with Expansive Portfolio

- Expand your accounts with highly demanded cloud-based print management solution
- Leverage the combined value of Printix and ControlSuite as complementary solutions that easily co-exist in a customer's environment
- Offer multiple deployment options that deliver maximum flexibility and alignment to customer requirements
- Combined solution can be architected to support organizational needs based on hybrid workforces



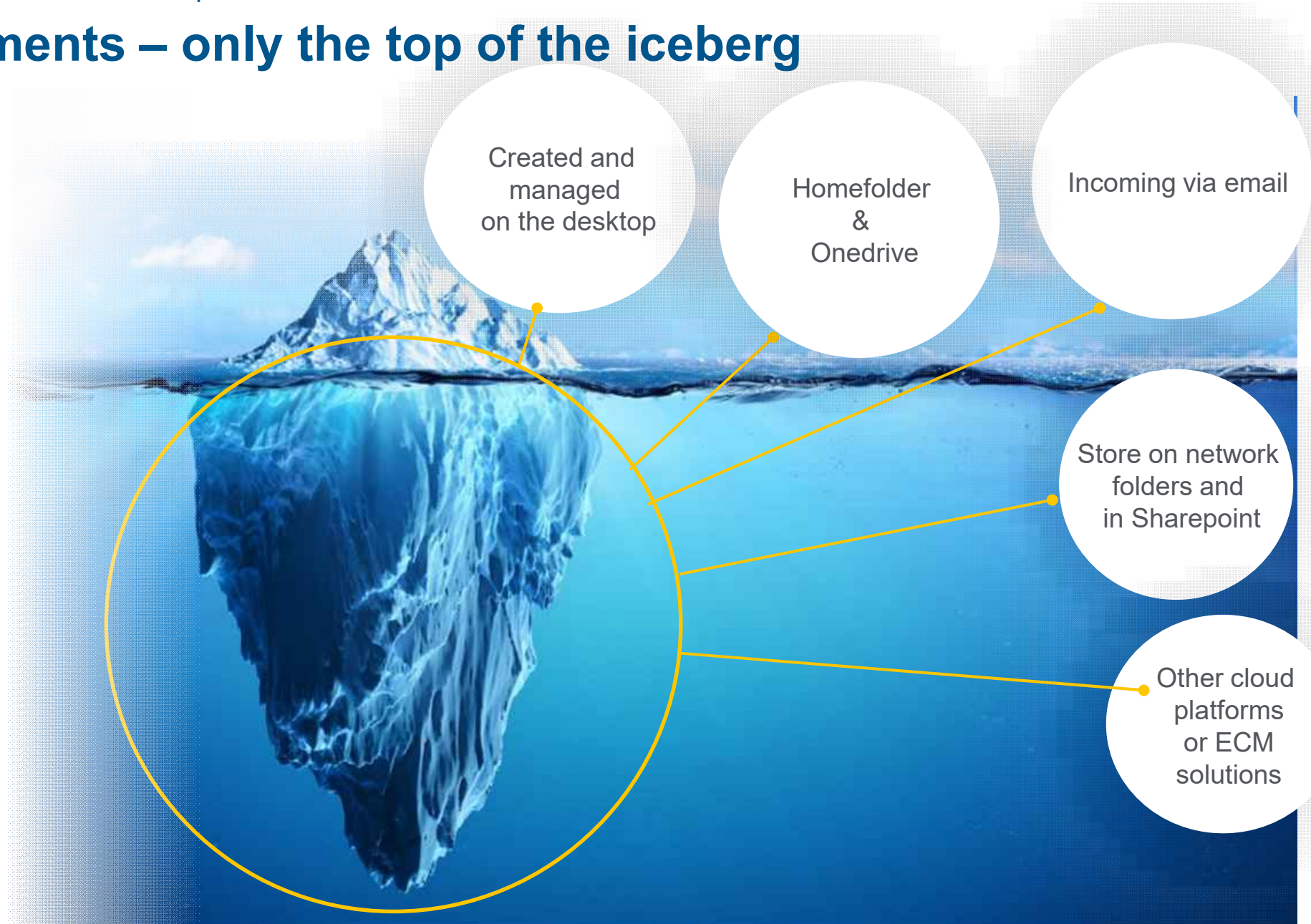
# ➤ Solutions Strategy Provider



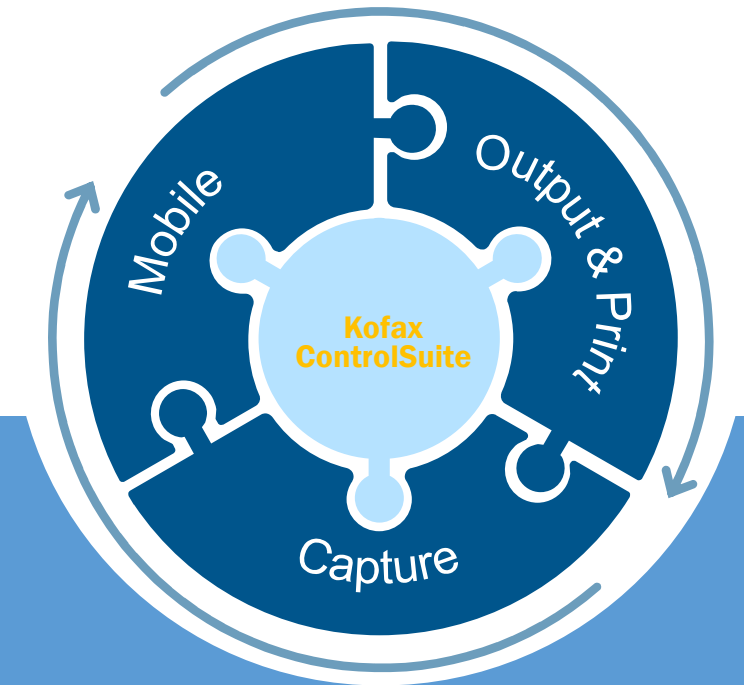
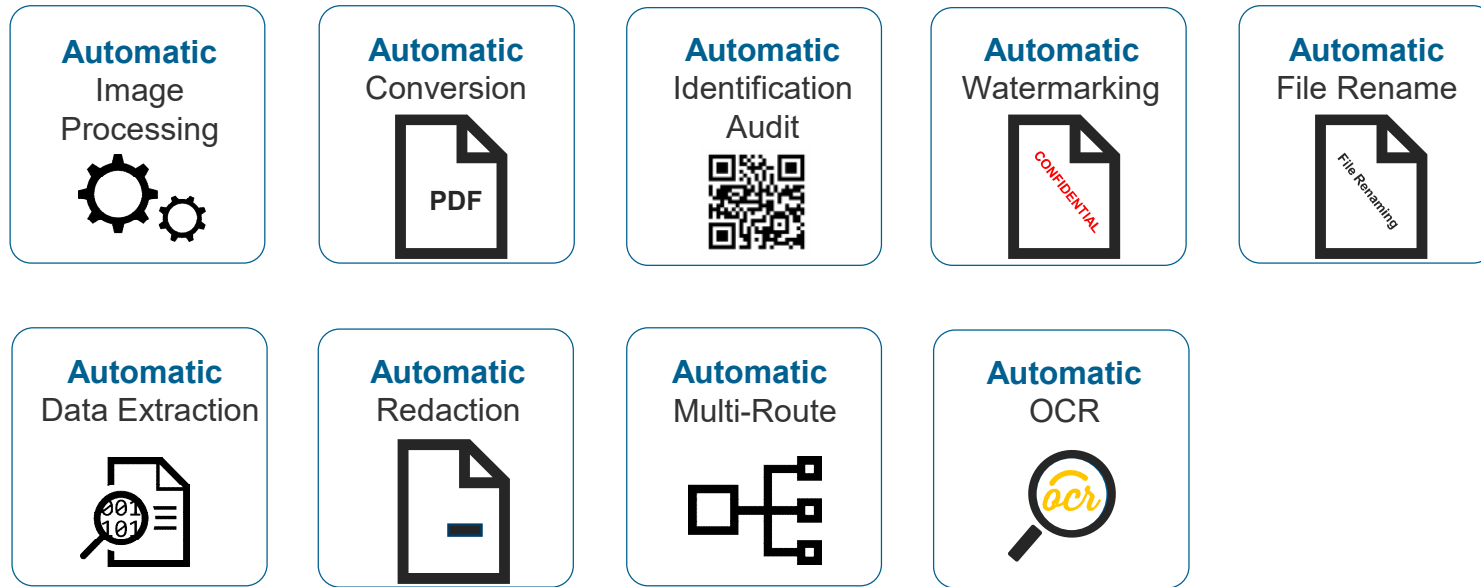
The secure, document automation platform

## ➤ Printed documents – only the top of the iceberg

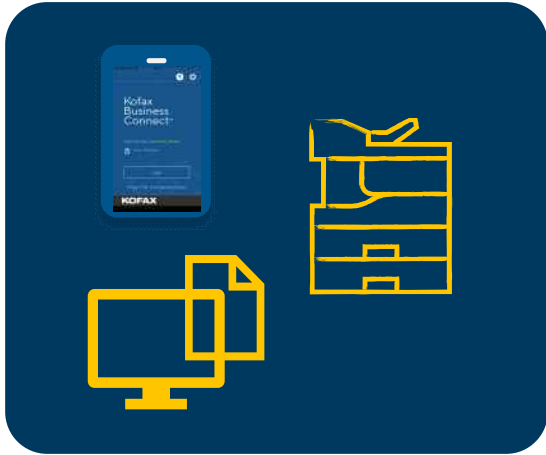
To address document workflow security and efficiency aspects customer need a solution that can help capture and process documents from multiple sources



# Lead with a software conversation

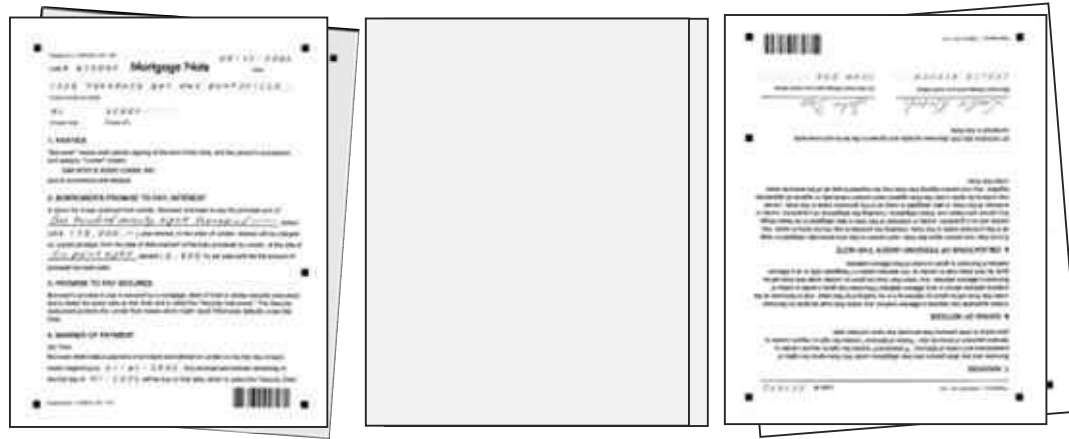


Kofax ControlSuite is a platform that integrates and connects **extraordinary document workflow capabilities, devices, systems and people** unlike any other solution, all in one platform



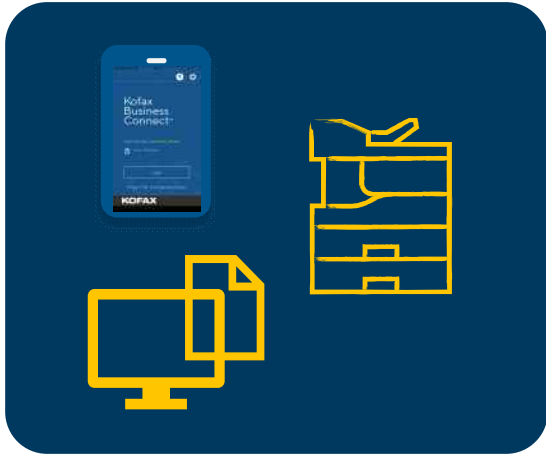
ControlSuite

## Automatic Image Processing



<p> <b>W-2</b>                  Wage and Tax                  Statement                  2003             </p>	<p>                 1040                  1040EZ                  1041                  1042                  1043                  1044                  1045                  1046                  1047                  1048                  1049                  1050                  1051                  1052                  1053                  1054                  1055                  1056                  1057                  1058                  1059                  1060                  1061                  1062                  1063                  1064                  1065                  1066                  1067                  1068                  1069                  1070                  1071                  1072                  1073                  1074                  1075                  1076                  1077                  1078                  1079                  1080                  1081                  1082                  1083                  1084                  1085                  1086                  1087                  1088                  1089                  1090                  1091                  1092                  1093                  1094                  1095                  1096                  1097                  1098                  1099                  1100                  1101                  1102                  1103                  1104                  1105                  1106                  1107                  1108                  1109                  1110                  1111                  1112                  1113                  1114                  1115                  1116                  1117                  1118                  1119                  1120                  1121                  1122                  1123                  1124                  1125                  1126                  1127                  1128                  1129                  1130                  1131                  1132                  1133                  1134                  1135                  1136                  1137                  1138                  1139                  1140                  1141                  1142                  1143                  1144                  1145                  1146                  1147                  1148                  1149                  1150                  1151                  1152                  1153                  1154                  1155                  1156                  1157                  1158                  1159                  1160                  1161                  1162                  1163                  1164                  1165                  1166                  1167                  1168                  1169                  1170                  1171                  1172                  1173                  1174                  1175                  1176                  1177                  1178                  1179                  1180                  1181                  1182                  1183                  1184                  1185                  1186                  1187                  1188                  1189                  1190                  1191                  1192                  1193                  1194                  1195                  1196                  1197                  1198                  1199                  1200             </p>
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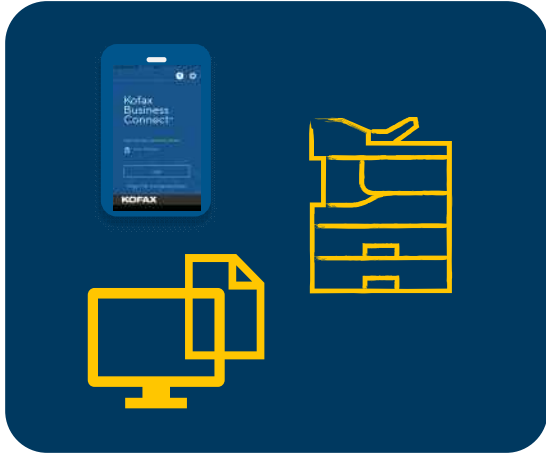


ControlSuite

A diagram showing document capture and processing. On the left, a document titled 'Mortgage Note' has a small barcode at the bottom right. A blue line connects this barcode to a larger, magnified barcode in the center. To the right of the magnified barcode is a document titled 'Sample' with a table of data. The word 'barcode' is written below the magnified barcode.

1. Plan No. (see page 1)	2. Order No. (see page 1)
3. Order No. (see page 1)	4. Order No. (see page 1)
5. Order No. (see page 1)	6. Order No. (see page 1)
7. Order No. (see page 1)	8. Order No. (see page 1)
9. Order No. (see page 1)	10. Order No. (see page 1)
11. Order No. (see page 1)	12. Order No. (see page 1)
13. Order No. (see page 1)	14. Order No. (see page 1)
15. Order No. (see page 1)	16. Order No. (see page 1)
17. Order No. (see page 1)	18. Order No. (see page 1)
19. Order No. (see page 1)	20. Order No. (see page 1)
21. Order No. (see page 1)	22. Order No. (see page 1)
23. Order No. (see page 1)	24. Order No. (see page 1)
25. Order No. (see page 1)	26. Order No. (see page 1)
27. Order No. (see page 1)	28. Order No. (see page 1)
29. Order No. (see page 1)	30. Order No. (see page 1)
31. Order No. (see page 1)	32. Order No. (see page 1)
33. Order No. (see page 1)	34. Order No. (see page 1)
35. Order No. (see page 1)	36. Order No. (see page 1)
37. Order No. (see page 1)	38. Order No. (see page 1)
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45. Order No. (see page 1)	46. Order No. (see page 1)
47. Order No. (see page 1)	48. Order No. (see page 1)
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69. Order No. (see page 1)	70. Order No. (see page 1)
71. Order No. (see page 1)	72. Order No. (see page 1)
73. Order No. (see page 1)	74. Order No. (see page 1)
75. Order No. (see page 1)	76. Order No. (see page 1)
77. Order No. (see page 1)	78. Order No. (see page 1)
79. Order No. (see page 1)	80. Order No. (see page 1)
81. Order No. (see page 1)	82. Order No. (see page 1)
83. Order No. (see page 1)	84. Order No. (see page 1)
85. Order No. (see page 1)	86. Order No. (see page 1)
87. Order No. (see page 1)	88. Order No. (see page 1)
89. Order No. (see page 1)	90. Order No. (see page 1)
91. Order No. (see page 1)	92. Order No. (see page 1)
93. Order No. (see page 1)	94. Order No. (see page 1)
95. Order No. (see page 1)	96. Order No. (see page 1)
97. Order No. (see page 1)	98. Order No. (see page 1)
99. Order No. (see page 1)	100. Order No. (see page 1)





ControlSuite

## Automatic Data Extraction

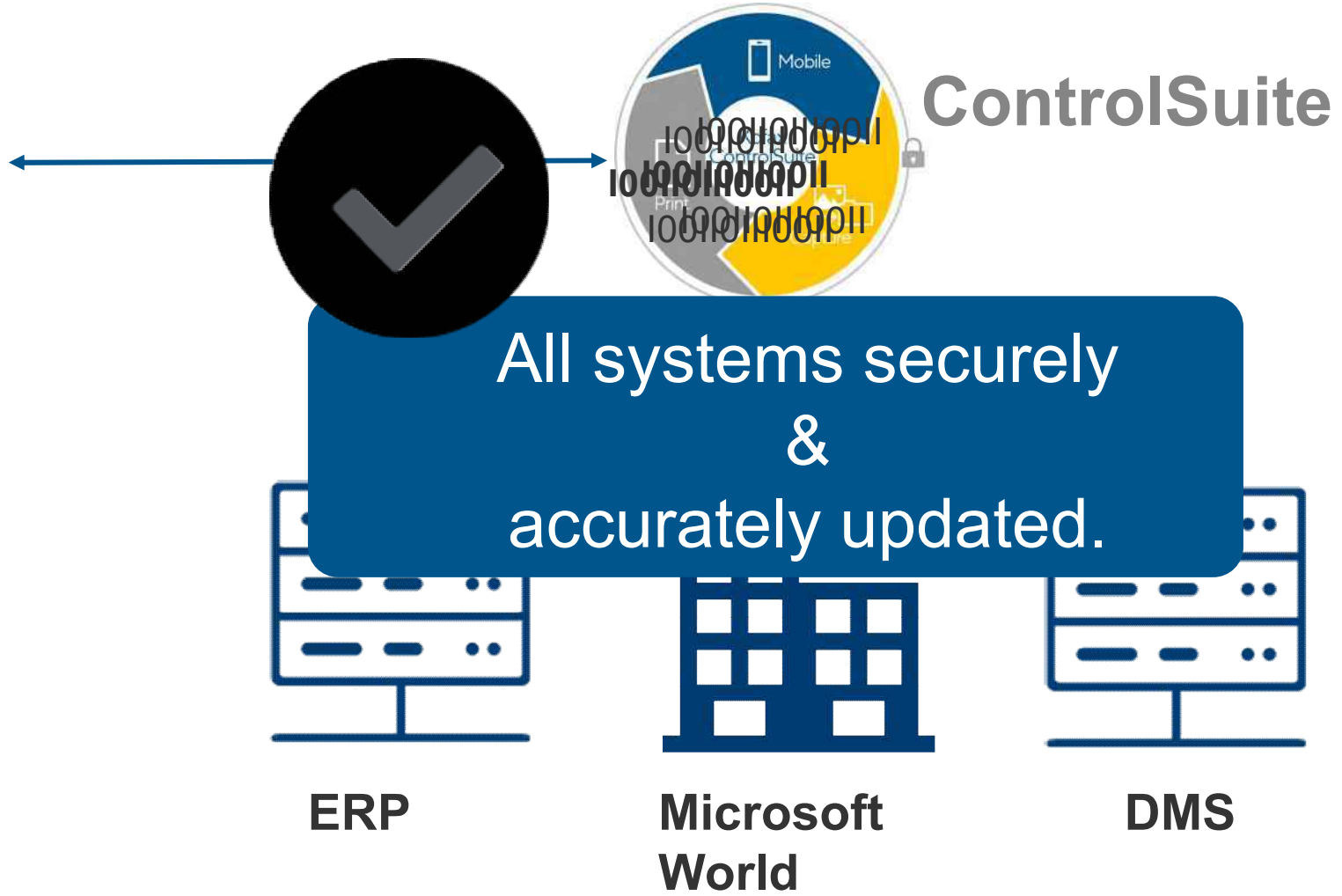
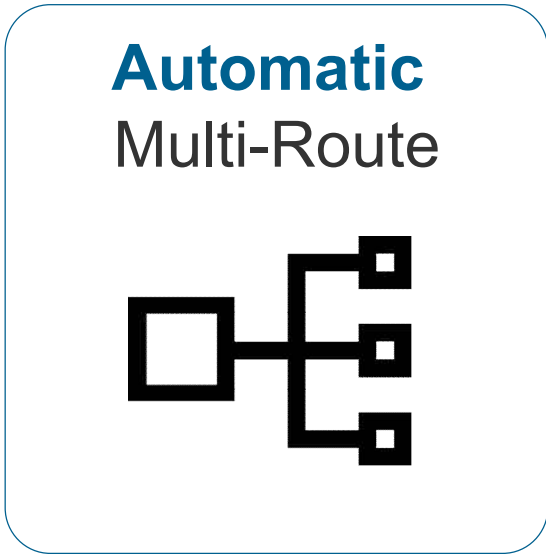
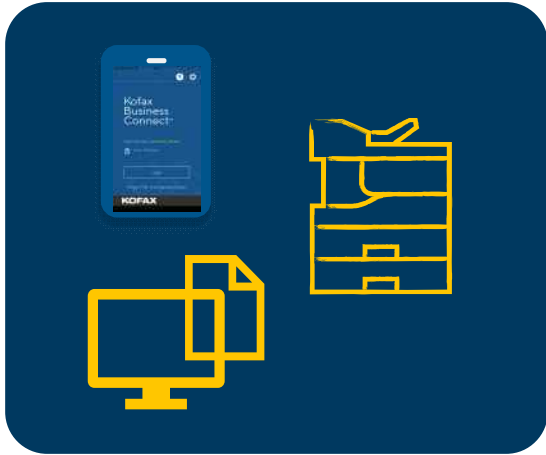


a Control number 03-000240- 22222		Void <input type="checkbox"/>		OMB No. 1545-0008		
b Employer identification number 99-9676543		1 Wages, tips, other compensation 25312.50		2 Federal income tax withheld 2522.33		
c Employer's name, address, and ZIP code Johnson Technical Services Corp 850 Tech Drive Suite 400 Anytown USA 15237		3 Social security wages 25312.50		4 Social security tax withheld 1569.38		
		5 Medicare wages and tips 25312.50		6 Medicare tax withheld 367.06		
		7 Social security tips		8 Allocated tips		
d Employee's social security number 221-00-9123		9 Advance EIC payment		10 Dependent care benefits		
e Employee's name, address, and ZIP code Dana T Brenner 179 Klein Road Arnold Pa 15068		11 Nonqualified plans		12a See instructions for box 12 D 120.00		
		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b		
		14 Other PA Sui 5.12		12c		
				12d		
15 Emp. state ID number PA 510403704		16 State wages, tips, etc. 25312.50	17 State income tax 708.76	18 Local wages, tips, etc. 25312.50	19 Local income tax 253.12	20 Locality name Allensburg

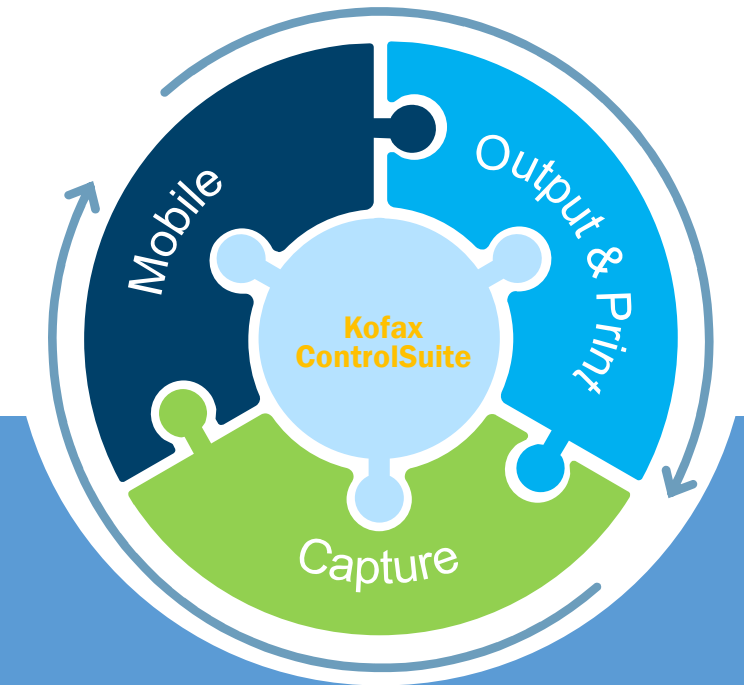
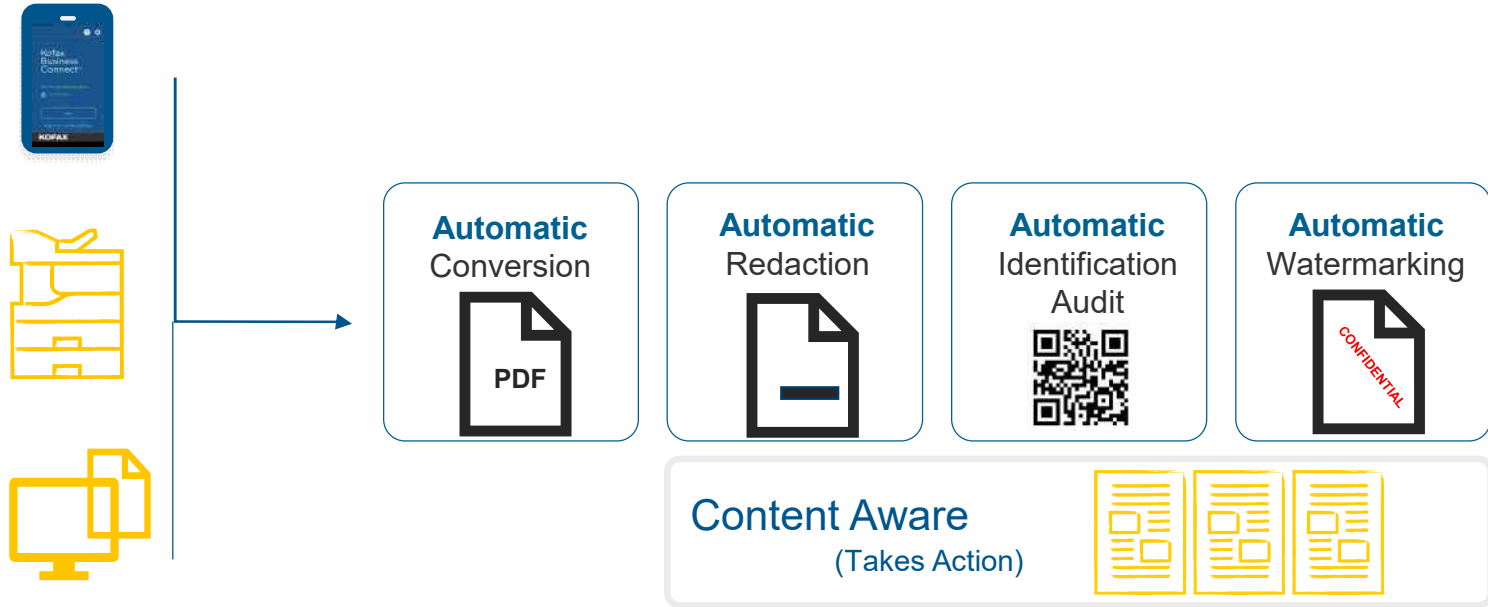
Sample

**W-2 Wage and Tax Statement** 2003

Department of the Treasury—Internal Revenue Service  
 Copy 1 For State, City, or Local Tax Department  
 Copy D For Employer.  
 For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.



# Output document workflows



## Content Aware

Answers **what** is being captured or printed beyond the standard why, when and who.

Enables **automatic redaction** of key words or patterns such as credit card numbers, email addresses, health insurance numbers, and social security numbers.

Identifies inappropriate printing of personal information or **confidential company information**.

Improves auditing of documents for better GDPR adherence – **regulatory compliance**.

Increases employee **productivity** with automation of manual, error prone tasks.



**AUTHENTICATE  
NFC AND KBC App  
RELEASE WITH  
UNIFIED CLIENT**

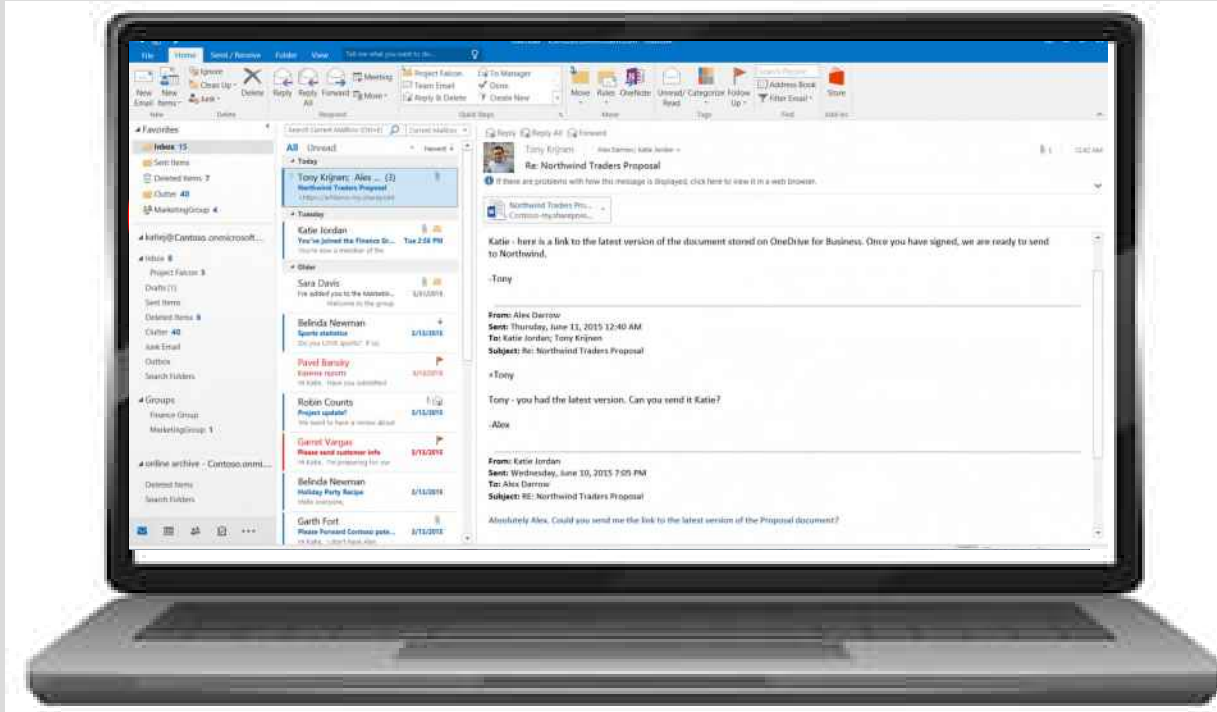
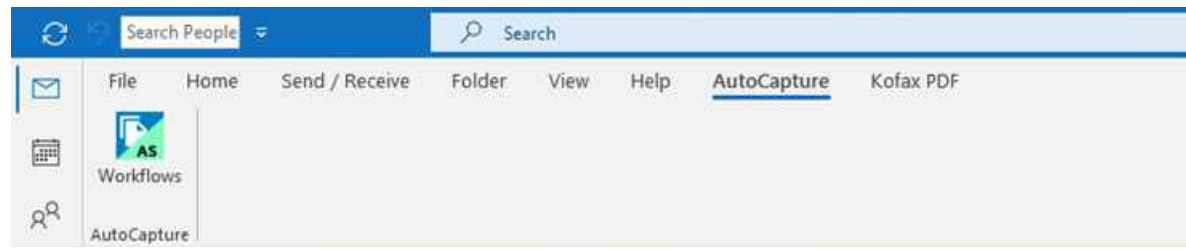


**SEND TO  
PRINT  
QUEUE**



# Our Daily Scenarios

## Client/Desktop



OMB No. 1545-0048		2003	
18 State wages, tax, etc. 25312.50		17 State income tax 708.76	
19 Local wages, tax, etc. 25312.50		18 Local income tax 253.12	
20 Local wage 25312.50		19 Local income tax 253.12	
21 Local wage 25312.50		20 Local income tax 253.12	
22 Local wage 25312.50		21 Local income tax 253.12	
23 Local wage 25312.50		22 Local income tax 253.12	
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31 Local wage 25312.50		30 Local income tax 253.12	
32 Local wage 25312.50		31 Local income tax 253.12	
33 Local wage 25312.50		32 Local income tax 253.12	
34 Local wage 25312.50		33 Local income tax 253.12	
35 Local wage 25312.50		34 Local income tax 253.12	
36 Local wage 25312.50		35 Local income tax 253.12	
37 Local wage 25312.50		36 Local income tax 253.12	
38 Local wage 25312.50		37 Local income tax 253.12	
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44 Local wage 25312.50		43 Local income tax 253.12	
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47 Local wage 25312.50		46 Local income tax 253.12	
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63 Local wage 25312.50		62 Local income tax 253.12	
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97 Local wage 25312.50		96 Local income tax 253.12	
98 Local wage 25312.50		97 Local income tax 253.12	
99 Local wage 25312.50		98 Local income tax 253.12	
100 Local wage 25312.50		99 Local income tax 253.12	

**United States Health Agency**  
45-9832-20  
Robert Jones

**Form W-2 Wage and Tax Statement**  
Copy 1 For State, City, or Local Tax Department  
Copy 2 For Employer.

Employer's state ID number: PA 510403704

Employee's Social Security Number: 15237

Employer's Federal Identification Number: 15068

Department of the Treasury - Internal Revenue Service  
For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Complete this form if this is a reflexive file.

Original Cost: \$ 402,500  
Amount Barring Loss: \$ 375,000

Purpose of Refinance: Cash-Out/Home Improvement  
Amount of Refinance: \$ 150,000  
Cost: \$ 150,000

Items will be held in: Fully Simple  
Bony and Wina Schlehenger  
Source of Down Payment, Satisfaction Cashes and/or Substantiated Financing Section: Fully Simple

Employee's Name (Last, First, Middle Initial): Wina B. Schlehenger  
Social Security Number: 04111953  
Mailing Address: 2 1440-32-5555  
City/State/Zip: 02161-9778

Signature: Robert Jones  
Date: 1/17

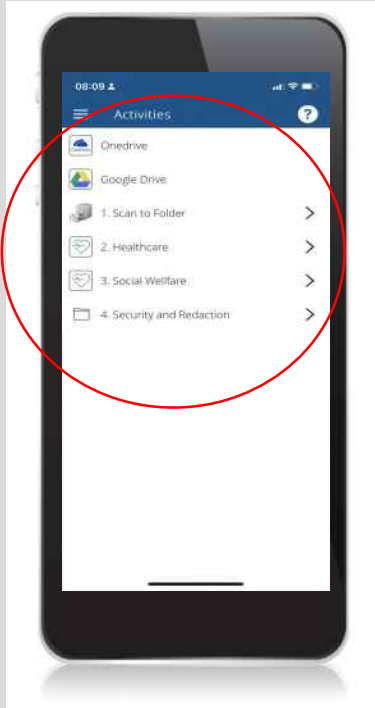
Kofax  
ControlSuite™

# Our Daily Scenarios

## Mobile Device



Mobile Device



OMB No. 1545-0046

1. Wages, tips, other compensation: 25312.50 2. Federal income tax withheld: 2622.33  
 3. Social security wages: 25312.50 4. Social security tax withheld: 1508.98  
 5. Medicare wages and tips: 25312.50 6. Medicare tax withheld: 367.06  
 7. Social security tips: 0.00 8. Allocated tips: 0.00  
 9. Advance EIC payment: 0.00 10. Dependent care benefits: 0.00  
 11. Nonqualified plans: 0.00 12. See instructions for box 12: 120.00  
 13. Health, dental, vision, and dependent care flexible spending account (FSA) contributions: 0.00  
 14. Other (See instructions for box 14) 5.12  
 15. State wages, tips, etc.: 708.76 16. State income tax: 25312.50 17. Local income tax: 233.12  
 18. Local wages, tips, etc.: 25312.50 19. Local income tax: 233.12

20. County name: ALLENBOROUGH

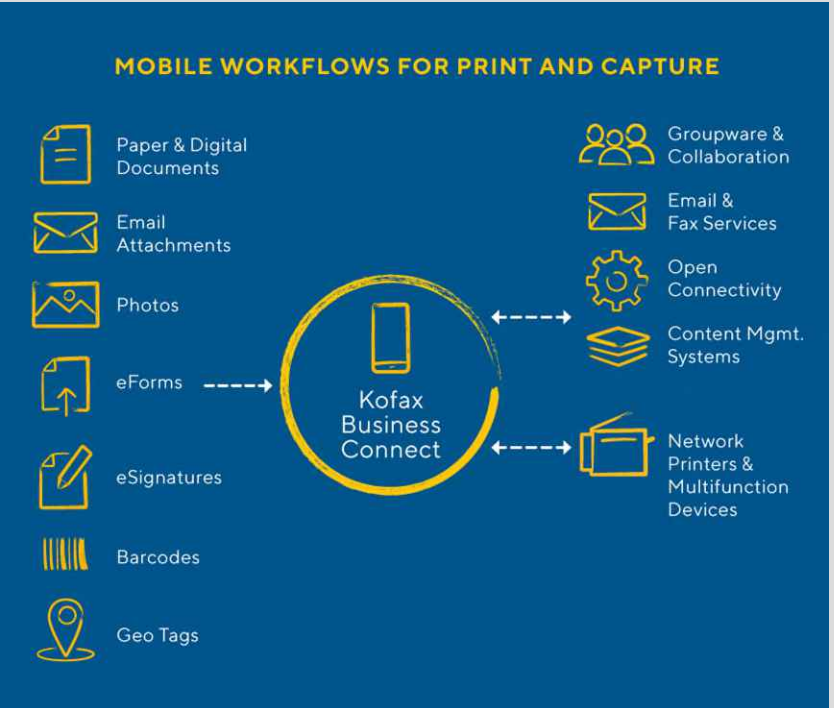
**2003**

Department of the Treasury—Internal Revenue Service  
 For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.



**W-2 Wage and Tax Statement**  
 Copy 1 For State, City, or Local Tax Department  
 Copy D For Employer.

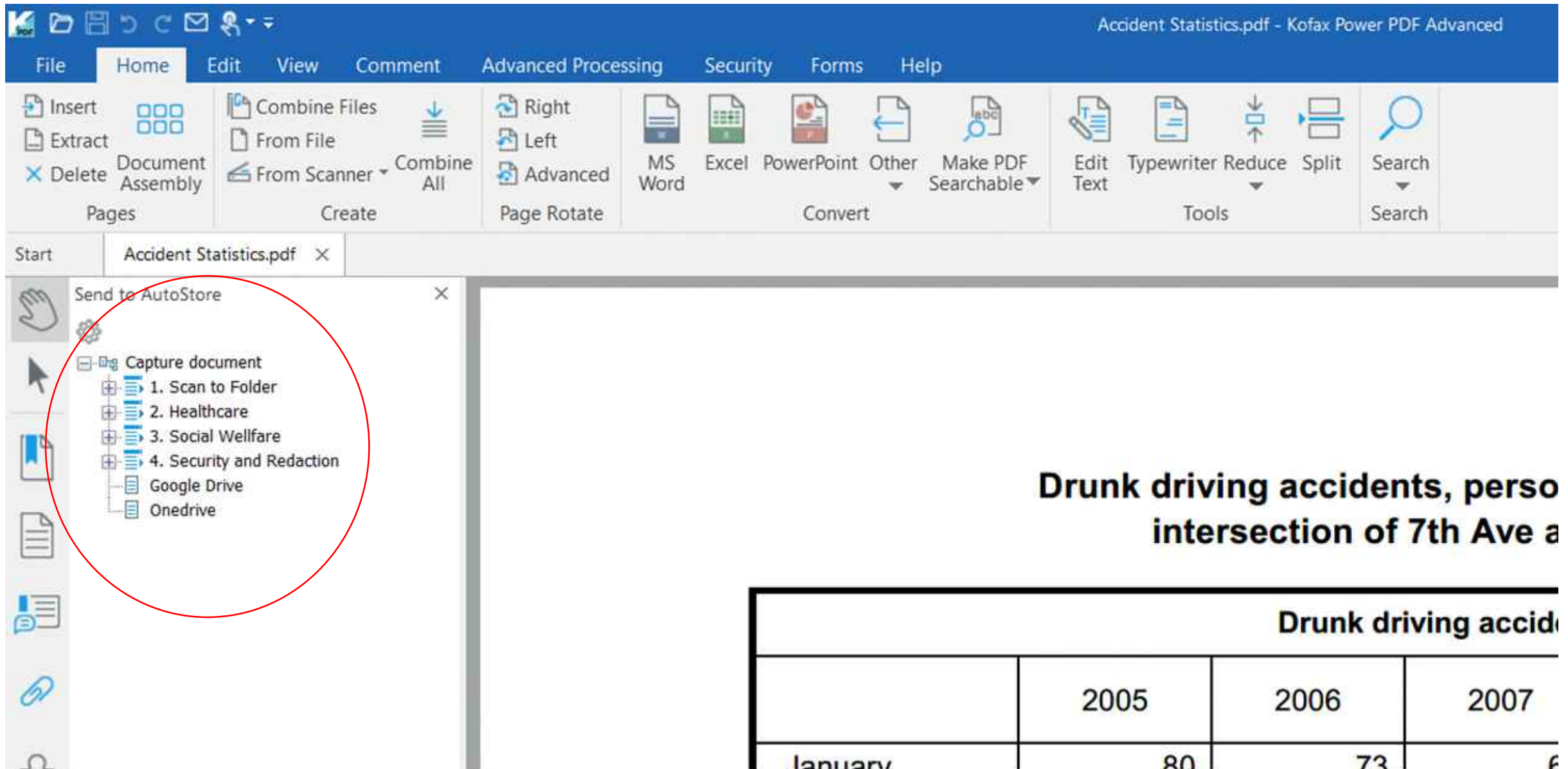
Complete this area if this is a reference line  
 Year: 1996 Amount: \$ 375,000 Purpose of Reference Line: Cash-Out-Rate  
 Original Cost: \$ 402,500 Duplicate Imprecations: None  
 Title will be held in trust for: Beneficiary: Beneficiary  
 Beneficiary Name: Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary  
 Beneficiary Name (include J, P, or F if applicable): Beneficiary



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# Import your ControlSuite Workflows into PowerPDF

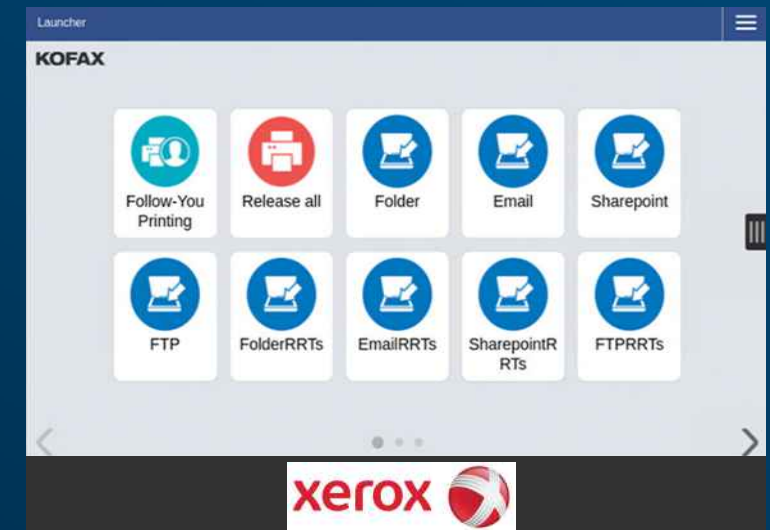
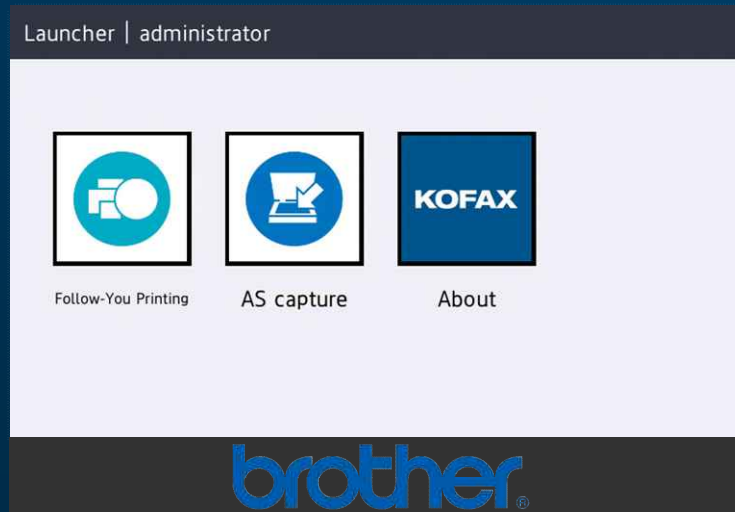
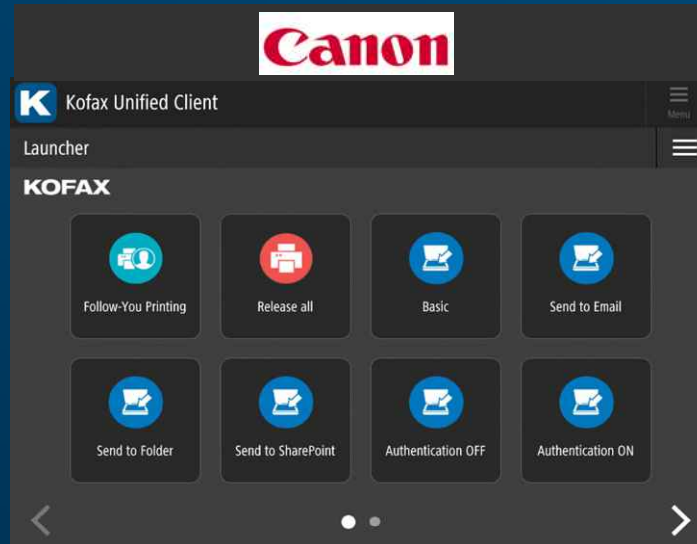


The screenshot displays the Kofax Power PDF Advanced software interface. The title bar shows the document name "Accident Statistics.pdf" and the software version "Kofax Power PDF Advanced". The ribbon includes tabs for File, Home, Edit, View, Comment, Advanced Processing, Security, Forms, and Help. The Home tab is active, showing various tools grouped into Pages, Create, Page Rotate, Convert, Tools, and Search. A "Send to AutoStore" panel is open on the left, with a red circle highlighting the "Capture document" section, which lists several workflows: "1. Scan to Folder", "2. Healthcare", "3. Social Welfare", and "4. Security and Redaction". Below the workflow list are options for "Google Drive" and "Onedrive". The main document preview area shows a document titled "Drunk driving accidents, perso" and "intersection of 7th Ave a". A table is visible in the preview, with the following data:

Drunk driving accide			
	2005	2006	2007
January	80	73	6



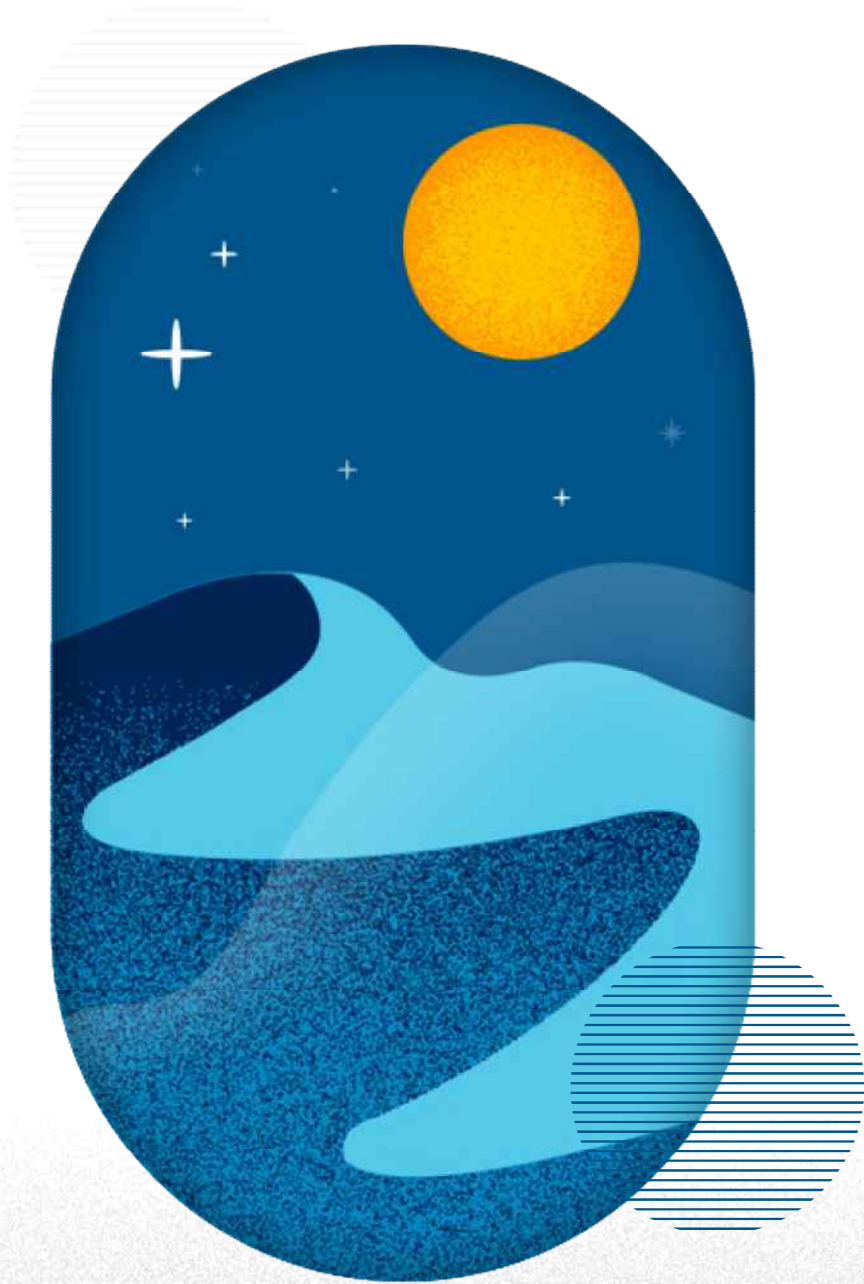
# Kofax ControlSuite Supports Mixed Fleet Environments



**KOFAX**

# Tools to support you

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**TICKET TO TOMORROW** <sup>GKO</sup> 23

# The 'Advantage' of Selling Kofax..



**Added  
Value**



**Increased  
Pipeline Visibility**



**Partner  
Appreciation**



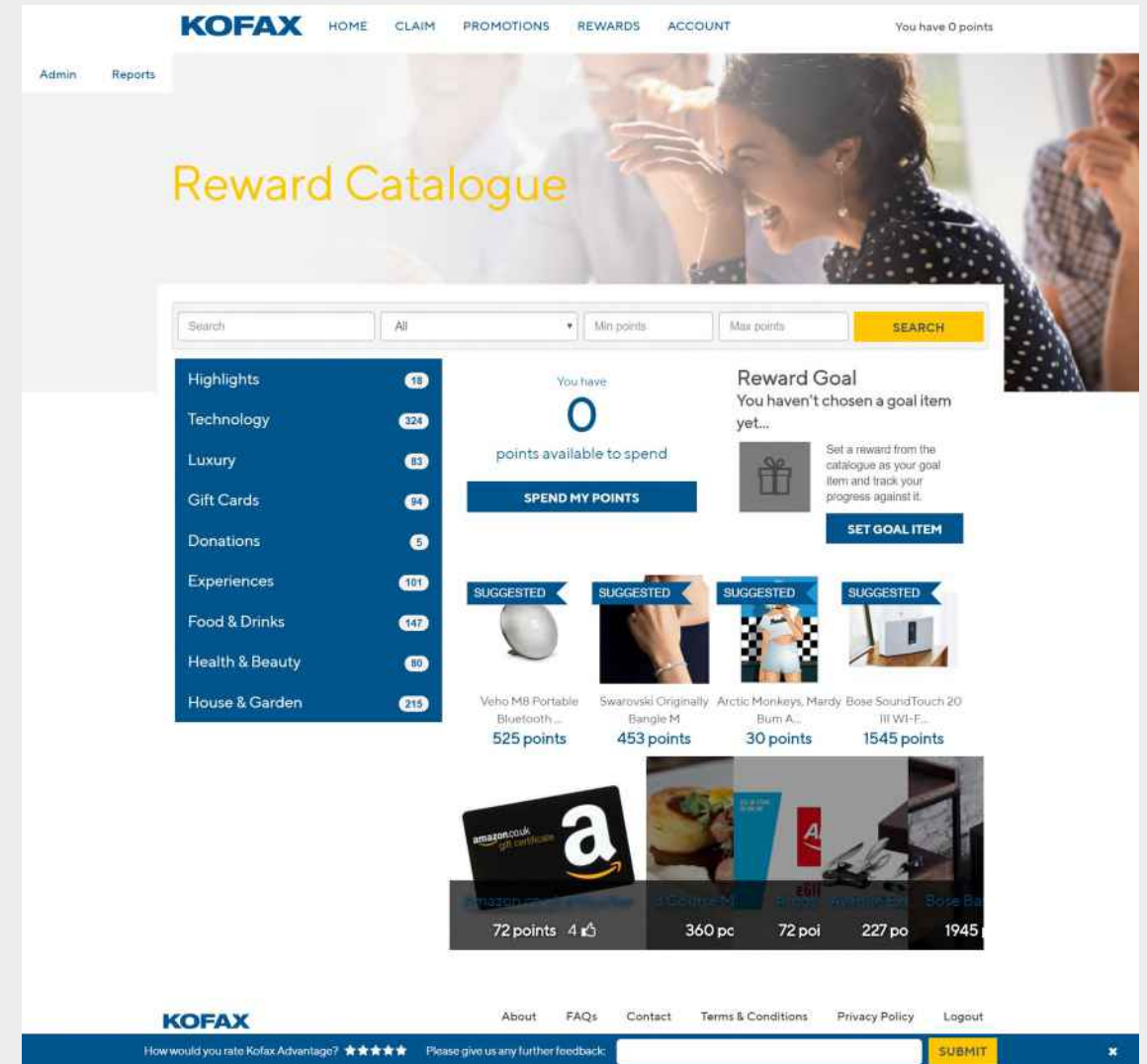
# Convert Points Into Rewards

Redeem your points on prizes from our reward catalogue

## Prizes include:

- Gift cards (retail, F&B, travel)
- **Amazon Vouchers**
- Tech gadgets
- Charity donations
- Leisure and travel
- And more...

Points expire 12 months after being rewarded.



# ➤ Introducing Kofax Learn & Earn



March 2023

**250**  
Points

Printix Sales Level 1

**250**  
Points

Printix Sales Level 2



May 2023

Submit in Advantage

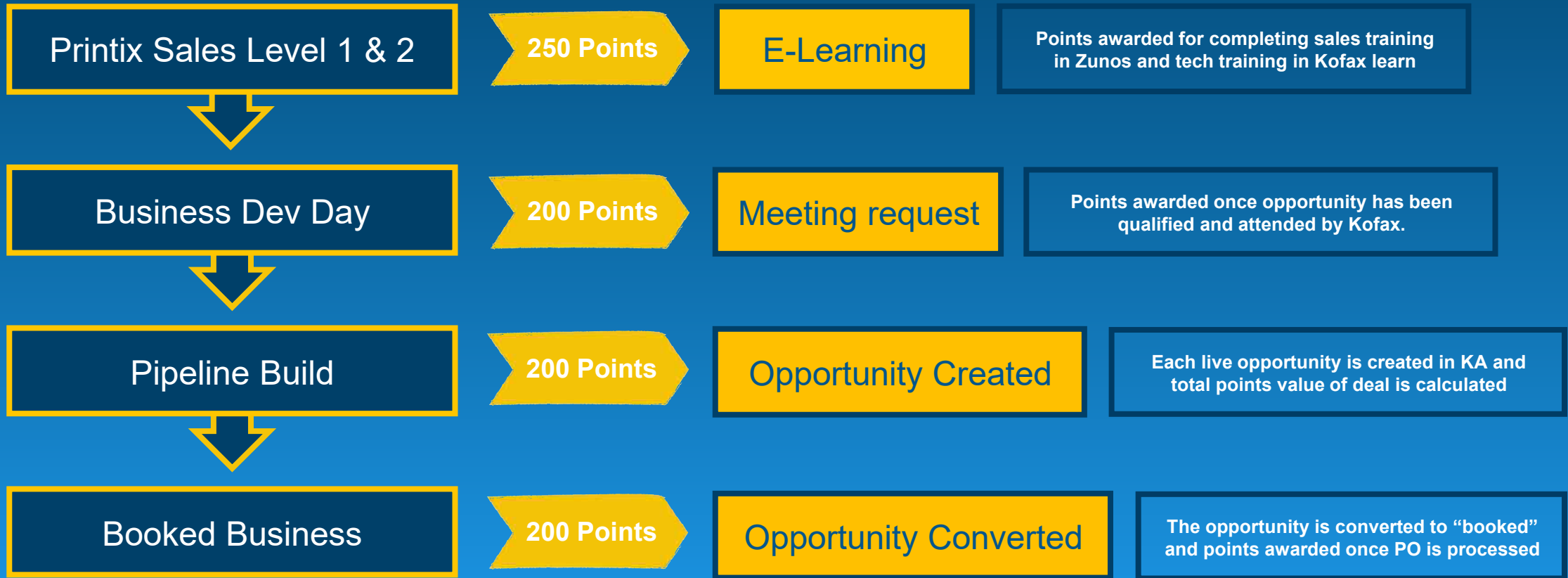
Earn points on completion of Printix Sales Training within the online training platform, Zunos.

**Courses must be enrolled, completed and submitted within Q2 2023.**

# ➤ Earn Points For What You Sell & How You Sell



# ➤ Learn & Earn for Printix 2.0 Launch (3yr Term)



**3 Meetings + 3 Printix (50 Device) Deals = 3,700 Points (up from 1,400)**



## Serverless Printing

Vendor agnostic, no infrastructure cost,  
scales with your business.

The **Missing Link**  
in Cloud Adoption



LEARN MORE

## Leverage Existing Investments

Windows, Chrome, Mac...

Who cares?



## Kickstart Cloud in 2023

Learn why **Printix**  
is the preferred solution  
for **Microsoft Azure**  
Marketplace



## Set it, Forget it... Say Goodbye to

- Complex Configuration
- Repetitive Tickets
- Support Calls

LEARN MORE



## Bridge the Gap with Printix

Integrate Print Management  
with your **Cloud** Ecosystem



## Location Anywhere

Give users  
**what they need,**  
**when they need it**



## Secure Cloud Home Printing

Move rapidly as working  
environments evolve



# ControlSuite Programs



Customer Loyalty Program



Competitor Knock-out



# Sales Playbooks – Kofax Content Hub

The screenshot displays a grid of content items in the Kofax Content Hub. At the top left, there is a 'Playbooks' dropdown menu. At the top right, there is a graduation cap icon and a plus sign. The grid contains the following items:

- Sales Playbooks** (37 items): Sales Playbook - Secure and ... (New Feb 28, 2023)
- Sales Playbooks** (2 items): Sales Playbook - PowerPDF +... (New Feb 22, 2023)
- Sales Playbooks** (28 items): Sales Playbook - Consumer L... (New Feb 17, 2023)
- Sales Playbooks** (14 items): Sales Playbook - Cloud Scala... (Trending Feb 17, 2023)
- Sales Playbooks** (22 items): Sales Playbook - Issue 100% ... (New Feb 16, 2023)
- Sales Playbooks** (11 items): Sales Playbook - Print Autom... (Trending Feb 15, 2023)
- Sales Playbooks** (2 items): Sales Playbook - Secure and ... (New Feb 15, 2023)
- Sales Playbooks** (14 items): Sales Playbook - Modernizin... (New Feb 15, 2023)
- Key Wins Playbooks** (26 items): Key Wins Playbook - Legacy ... (New Feb 14, 2023)
- Sales Playbooks** (28 items): Sales Playbook - Banking: On... (New Feb 14, 2023)
- Key Wins Playbooks** (22 items): Key Wins Playbook - Helsinki ... (New Feb 05, 2023)
- Sales Playbooks** (11 items): Growth Factory Playbook - T... (New Feb 01, 2023)
- Solution Playbooks** (1 item): (New Feb 01, 2023)
- Key Wins** (1 item): (New Feb 01, 2023)