

Sceris

Strategic Partner Program



Operations Manual

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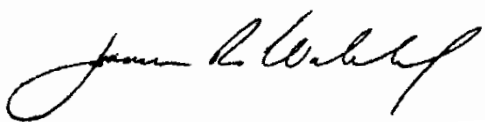
WELCOME

We welcome you to the ScerIS Strategic Partner Program and wish you tremendous success while participating with us in the promotion of our products, and services and in the further development of our partner program.

Having evaluated the program and having entered into an agreement with ScerIS, you're already aware of the uniqueness of this program and the possibilities presented for income generation. This manual is intended to provide valuable information and guidance to assist you in the development and implementation of your business plan, which should be designed to help you achieve goals that you have set for yourself or your business.

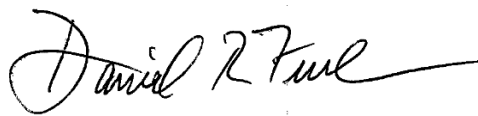
Please note that every Strategic Partner is assigned a resource at ScerIS as their primary contact to answer questions and provide assist as needed.

We welcome you as a part of TEAM SCERIS, and our team at ScerIS will do our best to support you in your pursuit of the opportunities presented here.



Jim Walckner

President & CEO



Dan Furbush

SVP & CBDO



INTRODUCTION TO THE STRATEGIC PARTNER PROGRAM

The Strategic Partner Program (SPP) is designed to provide income generating opportunities for partners.

Although a Strategic Partner (SP) can be geographically located anywhere internationally excluding participation by candidates in selected countries, the focus of your promotion activities are limited to the Territory described in the Strategic Partner Agreement – limited to the USA and Canada which are serviced by the ScerIS North America Operations Team.

The SPP consists of income generator systems ranging from those that require your active participation to income generators that are passive requiring less direct participation. Four of the five income generators in this program simply involve promoting the company (one involves your active participation through the sales cycle), its products and services and promoting this partnership program. You may participate in the development of the fifth income generator, but income generated will be more passive,

As with any business, partners in this program should have a sense of their income goals and should develop a plan that include some or all of these income generators to achieve those goals. For assistance with building a plan, refer to the Income Generator Worksheet section in this manual on page 10.

The income generators include:

- Revenue Sharing
- Partner Development
- Sub Partner Overrides
- VAR/OEM Development
- Recruiting

These income generators include your active participation as well as passive long-term income generation. Your involvement is summarized below:



Revenue Sharing – Products & Services

This Income Generator Provides Substantial Earnings Potential

ScerIS offers its products and services to nearly every business of every type. The company's product platforms are industry and system agnostic, meaning that they are configurable for nearly any unique client requirement. The company's services also include hosting services (in the ScerIS Cloud) and business process outsourcing. There is competition in each of these categories, but the company differentiates its offerings with bundled comprehensive solutions and services. This makes ScerIS a RESOURCE to its clients, which is one of the major differentiators for ScerIS and a SP.

For the ETCETERA® Software, ETCETERA® Software Maintenance and Managed Software as a Service (MSaaS), ScerIS pays 25% of the sale to the SP (refer to the Strategic Partner Agreement for details on this and other revenue sharing details). Additionally, ScerIS shares the revenue generated from SP facilitated transactions involving professional services, outsourced services and hosting services.

This is not your typical affiliate program. This is a big-ticket WIN-WIN partnership program that can provide up to \$5,000 to over \$100,000 per transaction to the SP.

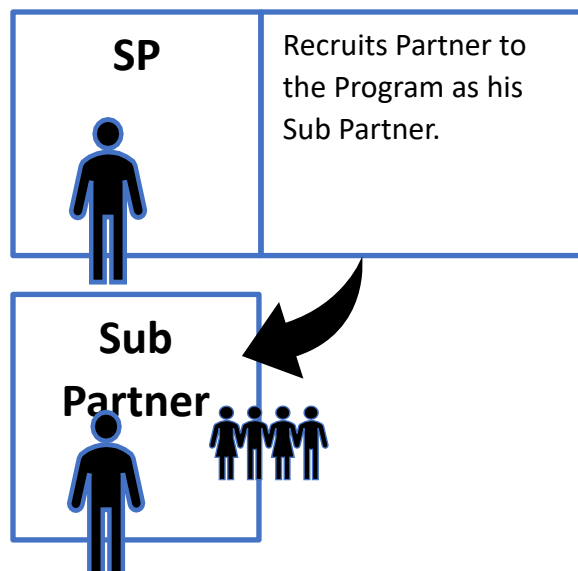
Direct Partner Recruitment (Development of New Partners for the Strategic Partner Program)

This Income Generator Can Provide a Forever Active/Passive Income Stream

Your efforts to recruit and involve businesses/individuals in the SPP can result in a significant passive stream of income. There are like-minded individuals and businesses that want to increase their earnings and increase their net worth or the value of their business, and the ScerIS 5-Income Generator Program may be a perfect fit for them.

Strategic Partners sponsor other partners (referred to as Sub-Partners) into the program and share in the transactions that ScerIS completes with these partners, forever. The SP is paid 20% of the General Revenue Sharing fees paid to the partners they recruit.

If a sub-partner earns \$10,000 per month, the sponsor (SP) earns \$2,000. If the sponsor (SP) has 5 sub-partners and each earn \$10,000 per month, the sponsor (SP) earns \$10,000 per month. If the sponsor (SP) has sponsored 40 partners over time and each earns \$10,000 per month, the sponsor (SP) earns \$80,000 per month, which is 20% of \$400,000.

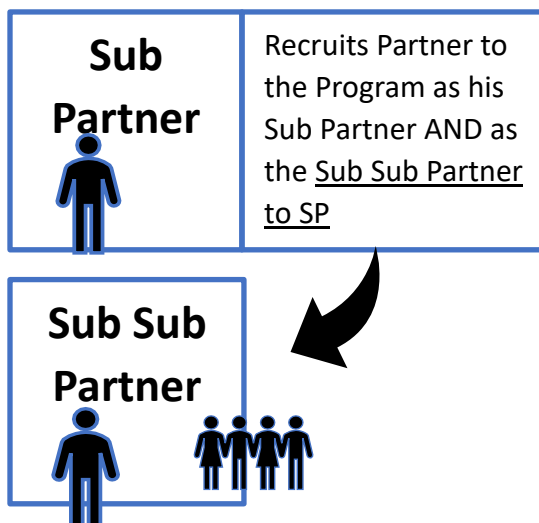


Indirect Partner Recruitment (Development of New Partners by Partners You Sponsor)

This Income Generator Can Provide a Forever Passive Income Stream

A truly passive opportunity occurs when income is generated without a direct effort. The partners you sponsor will sponsor other partners into the program. Referred to as your Sub-Sub Partners, you will be paid a fee of 10% of the fees paid to your Sub-Sub Partners for General Revenue Sharing.

If, over time you've sponsored 10 partners (your Sub Partners) into the program, and on average, each of them sponsors 4 new partners (your Sub-Sub Partners) into the program, that will provide you with 40 Sub-Sub Partners. If Sub-Sub Partners average \$5,000 per month in General Revenue Sharing income, you will earn \$20,000 per month, which is 10% of \$200,000.



Recruiting Services

This Income Generator Can provide a 2-Year Fee Income for Employee Placements at ScerIS

Help ScerIS attract additional talent to support its growing base of customers and projects. As a Strategic Partner (SP) you will be informed of open positions at ScerIS and have an opportunity to fill them. Successful placement of a candidate will result in a 15% fee based on the compensation paid by ScerIS to the placement in the prior month, for two years.

Compensation includes base pay, commissions and bonuses.

As an example, a placement of an employee earning \$80,000 per year will result in a fee to the SP of \$1,000 per month for up to two years, and will increase as the employee's wages increase, or as commissions or bonus are added to their base wage. Recruiting service fees can exceed 35% of the original starting wage of the employee when adding in other compensation adjustments, thus providing one of the best recruiting compensation plans available.

VAR/OEM Relationship Development

This Income Generator Can Provide a Forever Active/Passive Income Stream

Introducing organizations to ScerIS that result in reseller or private labeling agreements is an Active/Passive opportunity that can produce long term passive results. VAR and OEM relationships can be long term. ScerIS pays the Strategic Partner a fee equal to 5% of the ETCETERA® software license purchases made by resellers and OEMs, for as many months and years as purchases are made.

VARs are organizations that currently sell other software and/or hardware products and typically provide value-added services during the implementation of their solutions. Every VAR organization is a prospect

for a reseller relationship. OEMs are organizations that want to private label the ETCETERA® platform and use it in their product distribution or hosting services.

Your success with any of these Income Generators will be a direct result of your efforts combined with support from ScerIS resources. Over time you may become more self sufficient and less reliant on ScerIS resources as the result of being immersed in meetings with ScerIS resources, and you are invited to take a more active role in the sales process once you've achieved an understanding of ScerIS capabilities, products, services and pricing.

INTRODUCTION TO THE SCERIS ECONOMIC RECOVERY SOFTWARE GRANT PROGRAM

Refer to **PARTNER RESOURCES** (<https://www.sceris.com/partner-resources/>):

- Press Release: **SCERIS ANNOUNCES ECONOMIC RECOVERY SOFTWARE GRANT PROGRAM**
- Spreadsheet: **CALCULATING THE TOTAL VALUE OF THE GRANT**

ScerIS is providing its ETCETERA® software platform, through March 31, 2021, ***without a license fee*** to businesses and government entities. Beneficiaries of this grant will experience significant process improvements and corresponding cost reductions. Competitors of the company, as determined exclusively by ScerIS, are excluded from this offer.

The company is making approximately \$200,000,000 of In-Kind Software License Grants available in this program (FREE). For Strategic Partners this should result in up to \$20,000,000 in fees paid to partners for revenue sharing applicable to software maintenance, plus up to an additional \$6,000,000 to \$8,000,000 in fees for add-on services associated with these gifted licenses. For organizations that have desired access to this software or similar software, providing these software licenses without a corresponding license fee provides an advantage to the customer while also providing an opportunity for our partners to enjoy success in the program while the pandemic wreaks havoc on businesses and income generation everywhere.

Following March 31, 2021, this program may be extended if it is determined by the Board of Directors at ScerIS that the pandemic continues to have a negative financial impact on businesses and government entities.

The grant provides beneficiaries with as much software as they desire, and software granted to licensees is theirs without any additional license fee following the end of the grant period. Although businesses and government entities will select the licensing they desire, partners should encourage them to authorize all licensing they may need now and in the future before the termination of the grant program. Doing so will help them avoid subsequent license fees for additional users or modules as their requirements change or increase.

One of the files in RESOURCES is a spreadsheet in which you can estimate the amount of software available to a prospective business or government entity. This spreadsheet also shows the estimated software maintenance fee and the partner's portion of the fee based on the beneficiary licensing approximately \$1,000 in software licenses per employee. Smaller organizations are likely to utilize a higher value of license per employee than larger organizations, however, the values displayed for partner income are based on beneficiaries licensing \$1,000 in ETCETERA® software per employee.

In the spreadsheet, you will see the following. Simply enter the number of employees in cell B8 to identify the Total Available Value of the Grant, and to estimate the potential for revenue sharing from the proceeds of software maintenance. In the example below, a 380-employee company has an available software grant value of \$714,415 (\$1,880 per employee):

B8				380
	A	B	C	D
1	CALCULATING THE TOTAL AVAILABLE VALUE OF THE SOFTWARE GRANT FOR AN EMPLOYER			
2				
3	Enter the Number of Employees to Calculate the Total Software Grant Available to the Prospect in the Highlighted Field			
4	Software Maintenance is an Estimate Based on \$1,000 in Software Granted to a Business Per Employee			
5	Actual Revenue Sharing is Based on the Actual Amount of Software Maintenance Paid By Customer			
6				
7				
8	Number of Employees - ENTER	→	380	\$714,415 ← Total Available Value of the Grant
9				
10				
11	ESTIMATED SOFTWARE MAINTENANCE AND PARTNER SHARE, BASED ON \$1,000 PER EMPLOYEE SOFTWARE GRANT			
12	Software Maintenance if Paid Monthly	→	\$7,600	\$1,900 ← Partner Share - Monthly
13	or			or
14	Software Maintenance if Paid Annually	→	\$76,000	\$19,000 ← Partner Share - Annually
15				
16				
17				

While this grant program is in place, there will be no license fee for software. The revenue sharing, besides other components of the sale, will apply to software maintenance paid either monthly or prepaid annually. Revenue sharing is based on the terms in our agreement, but for software maintenance ScerIS pays the partner securing the sale 25% of the software maintenance payments received from the customer for two years' worth of maintenance.

Additionally, for all participants in this program with enterprise level licensing of the Enterprise Content Management module, including current customers, software licenses acquired after the termination of this grant program will be available with a 25% discount off list price.

Below is a copy of one of the press releases pertaining to this offer:

(Marlborough, MA April 21, 2020) ScerIS, Inc., a 27-year-old software developer and solutions resource that is changing the way its clients imagine, design and develop applications and efficient digital work processes, is excited to announce the ETCETERA® Economic Recovery Software Grant Program.

In an unprecedented effort to help facilitate recovery and strengthen businesses and government entities across the United States during these challenging times, ScerIS has initiated this unique Software Grant Program. In this program ScerIS is waiving the one-time fee to license users for its ETCETERA® software platform. ETCETERA® is used for RPA, workflows, application development, content management, business intelligence and much more.

The total value of software grants available to recipients is estimated to be more than \$200,000,000. Available to organizations large and small across all major markets, ETCETERA® is the cornerstone technology used to simplify IT, simplify business processes and significantly reduce costs. With ETCETERA®, employers can bridge the gap between where they find themselves and where they want to be, and with this program they can get there right now without the burdensome traditional costs of software licenses. In anticipation that the current economic challenges will last through the year, this program, instituted in March 2020 will run through March 2021.

"Offering unlimited licensing of our software platform will help businesses and our government services recover from the effects of this pandemic faster," says Jim Walckner, president & CEO, adding "this announcement was met favorably by our customers and I anticipate that new customers will be equally grateful as the product can help them bridge financial gaps created by this pandemic while also supporting remote workers, now and in the future".

For additional information about this program, contact the ETCETERA® Economic Recovery Software Grant Program office at 978-218-5025 or ERSGP@Sceris.com.

INTRODUCTION TO THE BUSINESS FORECASTING TOOL

Refer to **PARTNER RESOURCES** (<https://www.sceris.com/partner-resources/>):

- Spreadsheet: **INCOME PLANNING TOOL**

This section is intentionally removed. The Income Planning Tool is getting modified to accommodate the grant program. As soon as it is ready, partners will be notified.

BUSINESS PLAN – TARGETING INCOME WHILE THE SOFTWARE GRANT PROGRAM IS IN FORCE

Two examples are provided below for developing “Revenue Sharing Income”. The other income generators can provide for substantial additional income generation, but these few paragraphs focus on direct income generation via the revenue sharing program.

According to NAICS.COM, there are over 168,000 businesses in the USA with 100 or more employees. This number of companies presents an excellent opportunity for the SP.

In the first example, targeting \$100,000, the SP can easily determine what changes are necessary to their plan to achieve part of that income target, or multipliers on that income target. One way to increase income is manage the mix of customers (by size) and another is to manage the number of new customers you attract to the program. The second example shows how a plan may change when targeting a higher income level. **Note that the targeted annual income, in both examples, would be achieved for two years from your single effort while this grant program is in place.**

Example #1: Targeting \$100,000 in annual income. The assumption used in this section is that customers will select modules of the ETCETERA® platform that, in aggregate, amount to the selection of \$1,000 in software licenses granted per employee. This produces \$200 in Annual Software Maintenance and \$50 to the SP for each of the first two years.

If targeting \$100,000 in annual income and with each employee representing \$50 in annual income for each of two years, the total number of employees utilizing the software will need to be 2,000 ($\$100,000/\50). To achieve this, the SP will need one company with 2,000 employees, or two companies averaging 1,000 employees, or 10 companies averaging 200 employees (and any other variation of employers and employee headcount that will add up to 2,000). If you assume more than or less than \$50 per employee in annual income, adjust your forecasted requirements accordingly.

If your targeted income is \$200,000 or any other amount, make the adjustments necessary with average employee size of each company and the average revenue achieved in software maintenance.

Example #2: Targeting \$500,000 in annual income. To achieve this income level, we recommend targeting companies that have in excess of 2,000 employees, with the expectation that the SP will complete two transactions with employers with 5,000 or more employees and one with an employer with 2,500 employees. If each employer is selecting software modules that add up to \$1,000 per employee, then the SP will have created a \$500,000 income stream for two years.

Add to your income streams the potential income from additional services, partner development, recruiting and VAR/OEM development to get a complete picture of the income potential.

Please note that sales to government entities produces income that is $1/5^{\text{th}}$ of the income produced with a similarly sized for-profit or not-for-profit business. (SceGIS is limited in revenue sharing with sales to government entities because of the appearance of “influence” and has capped revenue sharing for these accounts at $1/5^{\text{th}}$ of the amounts that apply to other transactions).

EVERY STRATEGIC PARTNER GETS A PROSPECT GRANT REQUEST WEBPAGE

Every partner gets a webpage (with a URL specific to the partner) that is used to engage prospects for the grant and for capturing their company data which is necessary for development of the grant document pertaining to their business (or government entity). If you're on the phone with a prospect, just jump to your webpage and fill out the form for them, and submit it.

This page is made available to every partner without a fee – it's FREE. On the page is a form that once completed initiates a series of steps that include:

- Sizing the Grant for the prospect (estimate of the dollar value if licensed for the enterprise)
- Preparation of the Grant Proposal
- Emailing the Grant Proposal and a Worksheet to the Prospect (copies to the Strategic Partner). The worksheet provides the Prospect with the ability to adjust their desired licensing and see the effect of their changes.
- Follow-up by the Strategic Partner to ensure that the Prospect is in receipt of the email and documents.
- Follow-up by the Strategic Partner to identify next steps, arrange for ScerIS subject matter experts and technical support to respond to Prospects questions.

The page looks like the following, but may include a picture of the Strategic Partner:



In response to the economic impact of COVID on businesses and government entities across our great nation, ScerIS decided to grant its software to organizations to help them return from the negative economic impact of the pandemic stronger, healthier and better positioned for future success. Truly amazing as their board of directors has approved this grant and authorized gifting of \$200,000,000 in software licenses.

After March 31, 2021, we'll be back to business as normal, we hope. But until the end of March 2021 my focus is helping organizations get the software licenses they desire, in place, before this grant program expires. Please complete the form below and I'll get you a proposal outlining the value of the grant to your company. You'll be able to modify the modules granted to fit your needs. We have resources standing by to help you determine the licensing that will suit you best. And we'll adjust the licensing to reflect the modules that you desire. After submitting the form below, please give me about three days to get the grant proposal out to you. I know that time is of the essence because this program is ending as of March 31, 2021 or earlier if it is over-subscribed.

If you wish to connect, my email address is jrainone@sceris.com and my phone number is 978-218-5025.

John Rainone
ScerIS Affiliate

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ETCETERA®

The Multi-Purpose Platform

Enabling the Digital Office



Building Enterprise Applications



Unlocking the Power of Data



* Delivered On-Premise or in the Cloud

LEARN MORE

Request Grant Proposal

COMPANY/ENTITY:

Organization Name *

Website *

Type *

Street Address *

City *

State *

Zip Code *

Total Number of Employees *

Number of Employees in Executive Management Roles *

IF MUNICIPAL ENTITY (Town/City/County):

Number of Departments Providing Online Information to Constituents *

Total Population *

PRIMARY CONTACT:

Last Name *

First Name *

Title *

Email *

Phone *

CONTINUED ON NEXT PAGE

In addition to primary contact, send additional copies of grant proposal to the following email addresses (separate with a semi-colon ";")

Submit

EVERY STRATEGIC PARTNER GETS A PARTNER RECRUITING WEBPAGE

Every partner gets a webpage (with a URL specific to the partner) that is used for recruiting and sponsoring additional partners. Partners that choose to recruit businesses and individuals into the partner program will be able to refer their prospects to their webpage to review videos and learn about the program, and about their income potential and responsibilities if participating in the program.

This page is made available to every partner without a fee – it's FREE. On the page is a reference to a Strategic Partner Program agreement which includes a reference to the sponsoring partner.

The webpage currently includes information regarding the ScerIS Economic Development Software Grant program. At the time that the grant program ends, pages will return to the standard revenue sharing format with references to the grant program removed.

An example of a webpage is below.

The webpage features a dark header with the ScerIS logo on the left and ETCETERA on the right. The main content area has a blue background with a mountain image. The text reads: "Welcome to the Most EXCITING B2B Income Generation Program Known". Below this, it says "Learn about:" followed by "Building a Recurring, Growing, Residual Income Stream". A bulleted list follows: "• 5 Significant Income Generators", "• 100's of Income Opportunities", and "• No Investment – We Pay You". At the bottom left, there is a photo of Brian Remmes, a man in a suit and glasses, with a small logo next to him. To the right of the photo is a text block: "Hello, I'm Brian Remmes. I'm excited to be working with ScerIS to build their Strategic Partner Program and to be a part of the most exciting income generation program I've ever come across. The information and videos below are your introductory gateway to scaling the peaks of financial freedom that you've only dreamed of before today, where you are your own boss. I'm excited you're here, and look forward to speaking with you soon!". Below the text is a signature line: "~Brian". At the bottom of the page, there is a dark bar with the text "CONTACT ME FOR MORE INFORMATION" and a blue button with the text "CONTINUED ON NEXT PAGE".


ScerIS ETCETERA

**Welcome to the Most EXCITING B2B
Income Generation Program Known**

Learn about:

Building a Recurring, Growing, Residual Income Stream

- 5 Significant Income Generators
- 100's of Income Opportunities
- No Investment – We Pay You

 Hello, I'm Brian Remmes. I'm excited to be working with ScerIS to build their Strategic Partner Program and to be a part of the most exciting income generation program I've ever come across. The information and videos below are your introductory gateway to scaling the peaks of financial freedom that you've only dreamed of before today, where you are your own boss. I'm excited you're here, and look forward to speaking with you soon!

~Brian

CONTACT ME FOR MORE INFORMATION

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YOUR INTRODUCTORY GATEWAY...

About the Program

Please Watch Videos in Order



Video 1



Video 2



Video 3



Video 4

Achieve Financial Freedom

This program represents an unprecedented business opportunity for income production, peace of mind, financial freedom and recurring revenue that can last a lifetime and help you reach your peak success.

It consists of five significant income generators, described below, that are designed to inspire you to achieve your inherent potential. Just add your passion capital, personal drive and energy to create a thriving business. No fees are paid to ScerIS to participate in this program, now or ever.



ANNOUNCEMENT

July 22, 2020 – Message from our CEO

The pandemic has impacted businesses everywhere. At ScerIS, in order to offset the potential negative impact of this on our customers and our employees, we implemented the ScerIS Economic Recovery Software Grant Program. In doing so we had to make changes to our Strategic Partner Program to ensure the continued success of our partners.

It came as a surprise to us that our generosity would result in such success for our partners as well as our customers. Most exciting for our partners is that their potential for income generation actually increased with granting the software to customers, rather than charging for it. This is explained in the videos below.



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General Revenue Sharing

A Program for Significant Income Generation

Businesses provide products or services, or products and services. SceriS offers its products and services to nearly every business of every type. The company's product platforms are client agnostic, meaning that they are configurable for nearly any unique client requirement. The company's services also include hosting services (in the Cloud) and business process outsourcing. There is competition in each of these categories, but the company differentiates its offerings with bundled comprehensive solutions and services. This makes SceriS a RESOURCE to its clients, and this is one of the major differentiators for SceriS and a Strategic Partner (SP).

For the CTCCTERA[®] Software, ETCETERA[®] Software Maintenance and Managed Software as a Service (MSaaS), SceriS pays 25% of the sale to the Strategic Partner (refer to the SP Agreement for details on this and other revenue sharing details). This is not your typical affiliate program. This is a big-ticket WIN-WIN partnership program that can provide up to \$5,000 to over \$100,000 per transaction to the Strategic Partner.

Products & Services
Revenue Sharing for up to 2 years



Be a Talent Recruiter

A 2-Year Fee Income Program

Help SceriS attract additional talent to support its growing base of customers and projects. As a Strategic Partner (SP) you will be informed of open positions and have an opportunity to fill the position. Successful placement of a candidate will result in a 15% fee based on the compensation paid to the placement in the prior month for two years.

Compensation includes base pay, commissions and bonuses. Employees at SceriS recruit new partners into SceriS and benefit from the same program as outlined below, and these wages are excluded from the fee calculation.

As an example, a placement of an employee earning \$80,000 per year will result in a fee to the SP of \$1,000 per month for up to two years, and will increase as the employee's wages increase, or as commissions or bonus are added to their base wage.

Recruiting
15% on Employee Earnings for 2 years



Partner Recruitment

A Forever Active/Passive Income Program

Your efforts today can result in a significant passive income tomorrow. There are like-minded individuals and businesses that want to increase their earnings and increase their net worth or the value of their business, and the SceriS 5-Income Generator Program is a perfect fit for them.

Strategic Partners sponsor partners into the program and share in the transactions completed with these partners, forever. The sponsoring partner (that's you) is paid 20% of the General Revenue Sharing fees paid to the partners they recruited.

In essence, the sponsor earns the average paid to 5 partners they sponsored. If a sponsored partner earns \$10,000 per month, on average, from General Revenue Sharing, and there are 5 sponsored partners, the sponsor earns \$10,000 per month. If the SP has sponsored 40 partners over time, they are earning 8X the average earned by the partners they've sponsored for General Revenue Sharing. If their partners are each earning \$10,000 per month, that means that the SP is earning \$80,000 per month.

Partner Development
20% on Partner Earnings Forever



Unattended Development of Sub Partners

A Forever Passive Income Program

A truly passive opportunity occurs when passive income is generated without a direct effort. The partners you sponsor will sponsor other partners into the program. Referred to as your Sub Partners, you will be paid a fee of 10% of the fees paid to your Sub Partners for General Revenue Sharing.

If, over time you've sponsored 10 individuals into the program, and on average, each of them has sponsored 4 new partners into the program, that will provide you with 40 sub partners. If sub partners average \$10,000 per month in General Revenue Sharing income, you will earn \$40,000 per month.

Sub - Partner
10% on Sub-Partner Earnings Forever



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VAR/OEM Introductions

A *Forever* Active/Passive Income Program

Introducing organizations to SceriS that result in reseller or private labelling agreements is an Active/Passive opportunity that can produce long term passive results. VAR and OEM relationships can be very long term. SceriS pays the Strategic Partner a fee equal to 5% of the ETCETERA[®] software license purchases made by resellers and OEMs, for as many months and years as purchases are made.

VARs are organizations that currently sell other software and/or hardware products and typically provide value added services during the implementation of their solutions. Every VAR organization is a prospect for a reseller relationship. OEMs are organizations that want to private label the ETCETERA[®] platform and use it in their product distribution or hosting services.

Active/Passive means that the work you do today (Active) results in indirect income production in the future (Passive).



[CONTACT ME FOR MORE INFORMATION](#)

Next Steps

FAQ & Partner Agreement

Build your business opportunity with SceriS. To get started, please feel free to review our frequently asked questions section and our partner agreement to learn about Partner and SceriS responsibilities, revenue splits and other income generators.

[LEARN MORE - FAQ](#)

[PARTNER AGREEMENT](#)

REVENUE SHARING OVERVIEW

Modified for the ScerIS Economic Development Software Grant

Revenue sharing percentages applied to payments received from customers are the basis of payments to Strategic partners for three of the five income generators in the Strategic Partner Program. It's the basis for payments made to the Strategic Partner that facilitated the transaction, as well as for sponsorship overrides paid to sponsoring partners.

In March 2020, the ScerIS Board of Directors approved the ScerIS Economic Development Software Grant which provides customers with licensing to modules of the ETCETERA® platform without a corresponding license fee. This license fee had been the basis on which partners achieved their greatest income potential. With the elimination of the license fee until April 1, 2021, it was necessary to modify the Strategic Partner Agreement to make up for income shortfalls caused by this grant, and the company decided to apply revenue sharing to ETCETERA® software maintenance, which was previously excluded from these calculations. This change will remain after the expiration of the grant program.

Prior to the grant program, Strategic Partners helped ScerIS identify projects that were typically process or department oriented. With software granted to customers, the company has substantially changed its competitive position and encourages enterprise-class implementations of its products, and such implementations produce software maintenance that is larger than process or departmental licensing of the product, thereby increasing partner income potential. Additionally, organizations are more likely to evaluate the software platform as well as make decisions to accept the offer and put the software to work addressing processes enterprise-wide.

	Compensation % Sales Facilitation
SYSTEMS:	
1. ETCETERA Software – Standard Software License, Software Maintenance or Subscription (if installed on client infrastructure or on ScerIS Cloud – separate from SaaS pricing)	25%
2. Third Party Application Software (non SCERIS produced software)	5%
3. Professional Services and Support Services	10%
4. Hardware, Operating Systems, Databases, Firewalls, VPNs, Third Party Software Maintenance, Hardware Maintenance, Reimbursed Travel Expenses, Shipping and Sales Tax	EXCLUDED
5. Reimbursed Travel Expenses and Tax	EXCLUDED
OUTSOURCING SERVICES	
6. Document Conversion Services, Business Process Outsourcing, Print Services, Print Design Services	10%
HOSTING SERVICES	
7. MSaaS Hosted Offerings	25%
8. Hybrid and Private Hosting Services and Cloud Based File Storage (Infrastructure as a Service - exclusive of SCERIS Software, includes hosting services, operating system software subscription and Baas/DRaaS as applicable).	10%

For an organization with 500 employees that receives \$500,000 in granted software, the software is 2% of list if paid monthly or if prepaid annually is 20% of list (a 16.67% discount off a monthly software

maintenance subscription). The frequency of software maintenance payments is at the discretion of the customer. In this example the monthly software maintenance fee is \$10,000 or, if paid annually the annual software maintenance is \$100,000. The Strategic Partner's portion of this, if paid monthly is \$2,500 (monthly) or \$25,000 (annually). The Strategic Partner is paid this amount for invoices generated for 2 years following the date of the contract with the customer. Additionally, ScerIS shares other revenues, as presented in the Strategic Partner Agreement, for professional services, outsourced services and hosting services, which adds to the fees paid to our Strategic Partner as outlined for payments for software maintenance.

For this same transaction, the sponsor of the Strategic Partner receives 20% of the revenue sharing payment to the SP, thereby receiving either \$500 (monthly) or \$5,000 (annually). And the sponsor's sponsor is paid 10% of the revenue sharing payment to the SP, thereby receiving either \$250 (monthly) or \$2,500 (annually). Each are also paid their percentage applied to other revenue sharing dollars paid to the SP.

PROMOTING SCERIS TO POTENTIAL CUSTOMERS

Refer to **PARTNER RESOURCES** (<https://www.sceris.com/partner-resources/>):

- Direct Effort – Telephone Scripts
- Direct Effort – Emails
- Indirect Effort – Telephone Scripts
- Indirect Effort - Emails

The way in which you promote ScerIS may differ based on your business model. The business that is built around this program will take a more direct approach, while businesses such as a consulting company or recruiting/staffing company may add their promotion of ScerIS casually into their dialog or other communications. Generally, for-profit businesses promote ScerIS to their vendors, customers and the employers of relatives of employees and to employee networks, in particular with employees in management. Not-for-profit businesses promote ScerIS to contacts or relationships they have including their board of directors. Their promotion of ScerIS is typically limited to their circle of influence including personal/client relationships.

This section focuses on businesses taking a more direct approach to developing new business with ScerIS. Your promotion of ScerIS and ETCETERA® will result in interested prospects. There is product information in this manual as well as at <https://www.sceris.com>, however, if you are following the instructions in this area your product knowledge requirements will be minimal because ScerIS employees will participate in product discussions, demonstrations (if applicable), proposal development, negotiations and contracting.

Prospects for ScerIS products and services are everywhere, but it's important to focus on activities that present the greatest opportunity for income generation for the SP, and this will involve introducing the grant program to prospects that meet certain minimum requirements. For some idea of targeted industries and typical applications of the ETCETERA® platform in those industries, refer to INDUSTRIES SERVED in this manual.

One more thing to note is that businesses you consider prospects may already have products that are competitive with ETCETERA®. Their deployment of these products is typically for a department or a process, leaving the rest of the enterprise processes to be improved. Their choice, if they want to expand usage of the product in place is to purchase additional licenses (or pay subscription fees that include licensing costs) or receive the grant from ScerIS which currently has no license fee, and at this time they can license, without a fee, as much software as they desire. The numbers are clear, and for businesses that claim they only want one product let's help them discontinue use of their current product which is often limited in application (as it applies to the entire enterprise) and move their entire organization to ETCETERA®. So, just because a company indicates that they have a document management system, workflow or other related systems doesn't mean they aren't still an excellent prospect for the current offer or the ScerIS technology stack.

Promotion Methodologies – For a Strategic Business Partner Dedicated to the Program:

Whether you are a solo operation, you have a team or you're building a team, the methods of promoting the company, and in particular, the grant program are the same. They consist of embracing the methods that best suit your needs and may be comprised of emails, mailings, phone solicitation, marketing, press

releases and leveraging your network. For purposes of packaging the presentation, the following is provided as a framing that can be used in any setting.

Sample telemarketing scripts and emails are provided on the Partner-Resources page.

Generally, we are contacting executive leadership (“C” level) in companies with up to about 2,500 employees and leadership (“VP” level) in companies with 2,000 to 20,000 employees, and management (“Manager” level) in companies with 10,000 to 150,000 to introduce the program and the benefits. There’s a recognized overlap in those numbers, as there should be overlap in the individuals with whom you connect to secure new customers.

The promotion is a soft presentation of the grant program. “...have you heard about the software grant program that’s helping businesses overcome the economic impact of the virus?...” “did you know that the software granted to you, essentially gifted to you, will help your company reduce costs and return from the effects of COVID in a stronger and healthier position – can I make arrangements for one of the executives in the company to speak with you about the program?...”

If talking with a hospital, substituting hospitals for businesses, or hospital for company is the correct thing to do. The same applies to any business of any type.

In nearly all cases we are simply requesting time to introduce them to a grant program that gifts them software intended to have significant positive consequences for their business – simple.

For sample scripts, refer to the Partner-Resources page.

Please remember that you are reaching out to prospects to facilitate the next step. It is best not to use the ScerIS or ETCETERA® names in your telemarketing or emails because prospects will call ScerIS directly. For you to get credit for the reference you need to manage the introductory call with ScerIS representatives or register the contact with ScerIS once you have made a contact.

PROMOTING SCERIS TO POTENTIAL ADDITIONAL PARTNERS

Strategic Partners are in the form of individuals and companies. Although nearly anyone can be effective with this program (while the software grant program is in place), it will generally take people with promotion, marketing and sales skills to be effective once the grant program ends.

But given the potential for nearly anyone to be successful as a SP while the grant program is in place, this section currently focuses on developing partners that can benefit from the current structure.

As you introduce joining the SPP to individuals and businesses, remember these key elements of the program:

- It costs nothing to take a couple hours to evaluate this program and determine if it's for you.
- There are no fees to pay to participate, now or ever.
- There's income generation possible based on your promotion of the company and its capabilities, and while the grant program is in place, the company is prepared to give \$200,000,000 in software licenses to businesses and government entities to help them return from the economic impact of the pandemic stronger, healthier and better positioned for future success. This program is providing about \$25 million in fees to partners. *Can you promote the concept of a product for which the license fee, valued at about \$1,000 per employee, is given to companies without a license fee?*
- Your sponsorship of other partners will produce a fee to you based on their success for as long as they are successfully participating in the core revenue sharing income generator. You make 20% of their direct revenue sharing income. If one of the businesses you sponsor has 30 sales people, each producing \$50,000 in revenue sharing income for their company, you earn 20% of the amount paid to them ($30 \times \$50,000 \times .2 = \$300,000$), and that would be for just one company you've sponsored into the program. But of course, it's far more likely that most sponsorships will be of other like-minded individuals.

Individuals: Invite individuals with sales and marketing experience and with substantial networks. Many individuals are in 1099 commission-based sales programs, like real estate and insurance. These individuals are already familiar with income based on performance, but for the most part they are unfamiliar with the potential to earn the amount of income we are describing, especially when providing the base component without a license fee. Their broad set of contacts may include decision makers at businesses and government entities, but more important than a rolodex, their skill set positions them for success.

Sales Companies: Companies that have marketing and sales personnel are excellent prospects for the SPP. As an example, in a recruiting company each of the recruiters has relationships with client companies, hiring managers, placements they've made and individuals they've met but didn't place. Their business contacts are the best available, but recruiting companies are not your only target companies when promoting the SPP. For these businesses, which don't take a direct approach to promoting the grant program, they simply introduce the grant program as a part of their conversation pertaining to their primary line of business. They might end a conversation with "...by the way, I work with a company that ..., would you have an interest in having a conversation with them to learn more?"

Other Businesses: Whether these are customers or not, sales is not their core business. They might be for-profit or might be not-for-profit businesses. Businesses that want to participate in the program can

assign a resource to work with ScerIS who seeks to leverage the business' vendor base, customer base and the personal networks of employees (employers of employee spouses, children, parents, etc.). If the business is the fund-raising arm of a hospital, they might leverage those contacts through the hospital's materials management department or other means. Anyone that wants something bad enough will find a way to facilitate a positive outcome.

PROMOTING SCERIS TO POTENTIAL RESELLERS

Sponsoring reseller opportunities with Value Added Resellers (VARs) and Original Equipment Manufacturers (OEMs) can secure long term income opportunities for the sponsor. These organizations are typically system integration companies, companies with a proprietary product or consulting companies seeking to expand their product and capabilities portfolio.

Currently, while the grant program is in place, these companies can secure business with established clients by promoting this program, and their subsequent purchase of software maintenance produces the basis on which payments are made to the sponsor. When the grant program ends, these organizations will return to a traditional process that includes license or subscription sales.

RECRUITING FOR ScerIS

ScerIS maintains a list of open positions at <https://www.sceris.com/jobs>.

A SP does not need to be a recruiter or recruiting firm to provide candidates to open positions. Any SP can contribute to the candidates considered by ScerIS.

One key is to pay close attention to where the position is located, availability of working remotely and the company's position regarding moving expenses (on a job by job basis).

For each placement by a SP, the SP will receive 15% of the wages paid to the employee in the prior month for two years. To be clear, any employee whose employment terminates, or an employee that is on a leave that either reduces or eliminates compensation will have reduced the basis on which the recruiter's fee income is based.

NEW BUSINESS OPPORTUNITIES

A SP with special industry knowledge or wishing to start a business using the ETCETERA® software platform may propose such an undertaking to ScerIS for consideration.

ETCETERA®, in particular the Enterprise Content Management module can be private labeled for multi-tenancy deployments that may serve the unique business requirements of the SP's business proposal.

ScerIS is open to explore various licensing, subscription, MSaaS and hosting/cloud opportunities as well as opportunities that utilize other services of the company (business process outsourcing, document and system conversions).

ABOUT ScerIS

ScerIS has been and will continue to be a resource to its customers for Big Impact solutions and services.

Founded in 1993, the company's focus is to help customers retool business processes, automate people centric work, improve workforce productivity and utilize key performance indicators that help position them for increased profitability.

ScerIS is a resource to its customers in healthcare, financial services, business and government. Serving 16 major markets and over 100 industries, ScerIS provides:

- Business Process Improvement Solutions (Automation, Application Development, Workflows, Content Services, Scanning, EDI, and more)
- Business Intelligence Reporting and Data Analytics and Visualization Tools
- Mobile Workforce Solutions
- Custom System Design, Development and Implementation
- Hosting Services (MSaaS, Hybrid Cloud, Private Cloud, Business Continuity)
- Business Process Outsourcing
- Document and System Conversions

ScerIS:

Serving Customers as an Exceptional Resource for Innovative Solutions

INDUSTRIES SERVED

Competitive advantage is created by employees vested in the success of their company. Utilizing SaaS offerings and best of breed has leveled the playing field for most companies causing them to lose some of their competitive advantage. ScerIS products and capabilities focus on returning to a more self-reliant model, whether deployed locally or in the cloud, where business design and implementation services address their needs with a velocity that provides newfound competitive advantage.

This approach was determined after working with customers spanning industries, customers in the same industries, customers using different ERPs and customers that used the same ERPs but had unique requirements that were not adequately addressed by their ERP. Companies that want competitive advantage determine the best ways in which to achieve that.

Having created a platform for building applications, online processes and automation, ScerIS is providing the toolset that helps companies take direct responsibility for creating winning processes that differentiate them from their customers.

To some extent all businesses are the same. They all have vendors, accounts payable, employees, payroll, services or products they sell and invoices. They all receive payments for their invoice billings. They produce reports and have information archival needs. They all need information and KPI's. They have human resources and the plethora of forms and requirements associated with this function. But as much as they all have these core functions, many want to manage them differently and that's where the ETCETERA® platform is particularly useful.

ScerIS makes its products and services available to businesses, healthcare organizations, financial services companies and government entities. The complete list including sub-markets is below including a partial list of targeted areas for process improvements specific to each of the industries listed.

Architecture, Engineering & Construction (<https://www.sceris.com/aec/>)

- Architecture
- Civil Engineering
- General Contractors
- Construction Management
- Building Construction
- Industrial Construction
- Environmental Construction
- Infrastructure Construction
- Electrical Engineering
- Plumbing
- HVAC
- Demolition



- Job Files
- Billing and Accounts Receivable
- Engineering Files
- Time & Attendance Management
- Mobile Workforce Enablement
- Impact Study Files
- Procurement
- Financing Agreements
- Permit Management
- Compliance and Risk Management
- Human Resources
- Contract Management
- Order Processing
- Customer Service
- Accounts Payable
- Expense Account Management
- Accounts Receivable
- Purchasing
- Payroll / Time & Attendance

Banking (<https://www.sceris.com/banking/>)

- Investment Banks
- Retail Banks
- Commercial Banks
- Private Banks
- Credit Unions
- Mortgage/Lending Companies

Deposit Operations and Item Processing
Mortgages and Loans
Electronic Statement Generation and Distribution
Compliance and Risk Management
Signature Card Availability
Customer Records
Report Management
Lockbox Operations
Trust Department
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Communications (<https://www.sceris.com/communications/>)

- Radio and Television Broadcasting
- Cable Companies
- Newspaper Publishers / Online News Content
- Wireless Telecommunications (Cellular, Satellite)
- Wired Communications

Shared Services
Accounts Receivable and Collections
Accounts Payable
Mobile Workforce Enablement
Performance Reporting
Report Management and Distribution
Billing
Payment Posting
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Distribution (<https://www.sceris.com/distribution/>)

- Food
- Dairy
- Beverage
- Technology
- Printing
- Chemical
- Plastics
- Tire / Other Rubber
- Construction Materials
- Metal
- Communications Equipment
- Transportation Equipment

Shared Services
Shipping and Receiving
Shipping and Logistics Management
Marketing Reimbursement Management
Billback Management
Chargeback Management
Customer Service
Customer Portal
Vendor Portal
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Financial Services (<https://www.sceris.com/financial-services/>)

- Securities Brokerage Companies
- Service Bureaus
- Credit Card Companies
- Pension Funds
- Financial Investment Companies

Client Records Management
Application Processing
Property and Lease Management
Stock Certificate Processing
Real Estate Document Management
Statement Rendering
Payment Posting
Proxy Processing Report Management
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Government (<https://www.sceris.com/government/>)

- Federal / State / County / Local
- Public Administration
- Justice – Correctional Institutions
- Public Safety
- Regulation / Licensing / Inspection
- Armed Forces
- Educational Services
- Public Utilities

Tax Records and Property Records
Tax Lien / Tax Deed Management
Services Processing (Water, Sewage)
Student Records Management
Educator Records Management
License, Permit and Registration Management
Agency Records Conversion and Management
Medical Records / Electronic Health Records
Firearms Record Management
Customer / Constituent Services
Income Tax Processing
Sales Tax Processing
Excise Tax Processing
GIS / Imaging Integration
Web Forms / Online Forms
Web Portals
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Healthcare – Payers (<https://www.sceris.com/healthcare-payers/>)

- Health Insurance
- Dental Insurance
- Workers Compensation Insurance
- Third-Party Administrators (TPA)
- Managed Service Organizations (MSO)
- Administrative Services Organizations (ASO)

Claims Processing
Adjudication Management
Referral Management
Enrollment Processing
Policy Packaging and Presentation
Contract Management
Customer Service
Utilization Management
Payment (EOB) Rendering and Presentation
Premium Billing and Collections
Coordination of Benefits
Compliance and Risk Management
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Healthcare – Providers (<https://www.sceris.com/healthcare-providers/>)

- Hospitals
- Behavioral Health
- Commercial labs
- Group Practices
- Life Science Blood and Organ Banks
- DME/HME
- Diagnostic Imaging Centers
- Home Health Services
- Pharmaceutical/Medicine
- Nursing Homes/Long Term Care/CCRC
- Ambulance Companies

Medical Records
Laboratory
Radiology
Patient Financial Services
Clinical Trials
Credentialing
Patient Access
Capital Budget Planning
Donor Records Management
Patient Registration/Intake
Free Care Management
Accounts Payable
Accounts Receivable
Purchasing
Expense Account Management
Payroll / Time & Attendance

Insurance (<https://www.sceris.com/insurance/>)

- Property & Casualty Carriers
- Life Insurance Carriers
- Reinsurance Companies
- Managing General Agents (MGA)
- Third-Party Administrators (TPA)
- Claim Service Providers
- Alternative Risk Organizations

Claims Management
Premium Billing and Collections
Underwriting
Reinsurance
Policy Writing and Issuance
Agency Management
Broker Workflow
Records Conversion
Certificates of Insurance
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Manufacturing (<https://www.sceris.com/manufacturing/>)

- Food
- Dairy
- Beverage
- Textile
- Apparel
- Wood
- Paper
- Printing
- Energy
- Chemical
- Explosive
- Plastics
- Tire / Other Rubber
- Computer & Electronic Equipment
- Communications Equipment
- Transportation Equipment

Shared Services
Order Processing and Acknowledgement
Bill Processing and Accounts Payable
Chargeback Management
Product Development and Engineering
Claims Management
Supply Change Management
Customer Support
E-Pedigree
Quality Assurance
Material Test Reports
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Not-For-Profit (<https://www.sceris.com/nfp/>)

- Professional and Trade Associations
- Educational Institutions
- Foundations
- Charitable Organizations
- Social and Human Services Organizations
- Cultural
- Religious
- Research and Scientific

Membership / Donor Management
Financial Services Management
Research Management
Application Processing
Student Records Management
Grant Management
Contract Management
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Professional Services (<https://www.sceris.com/professional-svs/>)

- Accounting / CPA Firms / Tax Preparation
- Architectural / Engineering
- Surveyors and Mapping
- Computer Systems
- Software Development
- Management Consulting
- Environmental Consulting
- Research and Development
- Human Resources
- Employment Services / Temporary Help
- Direct Sales (DSO)
- Data Processing
- Hosting
- Information Services
- Freight Payment

Invoicing, Accounts Receivables and Collections
Electronic Records Management
Client Records Management
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Retail (<https://www.sceris.com/retail/>)

- Motor Vehicles and Parts
- Furniture
- Electronic / Computer Products
- Appliances
- Building Materials
- Food and Beverage
- Pharmacies / Drug Stores
- Gasoline Stations / Convenient Stores
- Clothing / Shoes / Jewelry Stores
- Sporting Goods

Shared Services
eCommerce
Chargeback Management
Report Distribution
Shipping and Receiving
Contract Management
Compliance and Risk Management
Human Resources
Contract Management
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Tourism, Hospitality and Leisure (<https://www.sceris.com/thl/>)

- Hotel and Lodging
- Casino and Gaming
- Hotel Management
- Day Resort and Destination Spas
- Car Rental
- Cruise Lines
- Travel Agencies
- Food Service Management
- Sports and Entertainment

Sales and Marketing
Credit and Debit Management
Document Management
Commercial / Tour Operator Billings
System Integration / Portals
Data Warehousing
Custom Portals
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Transportation (<https://www.sceris.com/transportation/>)

- Air/Rail Transportation
- Truck Transportation (TL / LTL / Small Package)
- Freight Brokers
- Household Goods
- Urban Transits
- School Bus
- Courier

Shared Services
Billing, Accounts Receivable & Collections
Delivery Services
(including Mobile Device-based Applications)
Planned Routes
GPS Tracking
Fleet Maintenance
Web Portals
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

Utility Companies (<https://www.sceris.com/utility/>)

- Electric Power Generation
 - (Hydro, Wind, Fossil Fuel, Nuclear)
- Electric Power Transmission / Distribution
- Natural Gas Distribution
- Water / Sewage Facilities / Supply Distribution

Shared Services
Accounts Receivable and Collections
Accounts Payable
Performance Reporting
Report Management and Distribution
Billing
Payment Posting
Contract Management
Compliance and Risk Management
Human Resources
Order Processing
Customer Service
Accounts Payable
Expense Account Management
Accounts Receivable
Purchasing
Payroll / Time & Attendance

ETCETERA®, THE ScerIS SOFTWARE PLATFORM

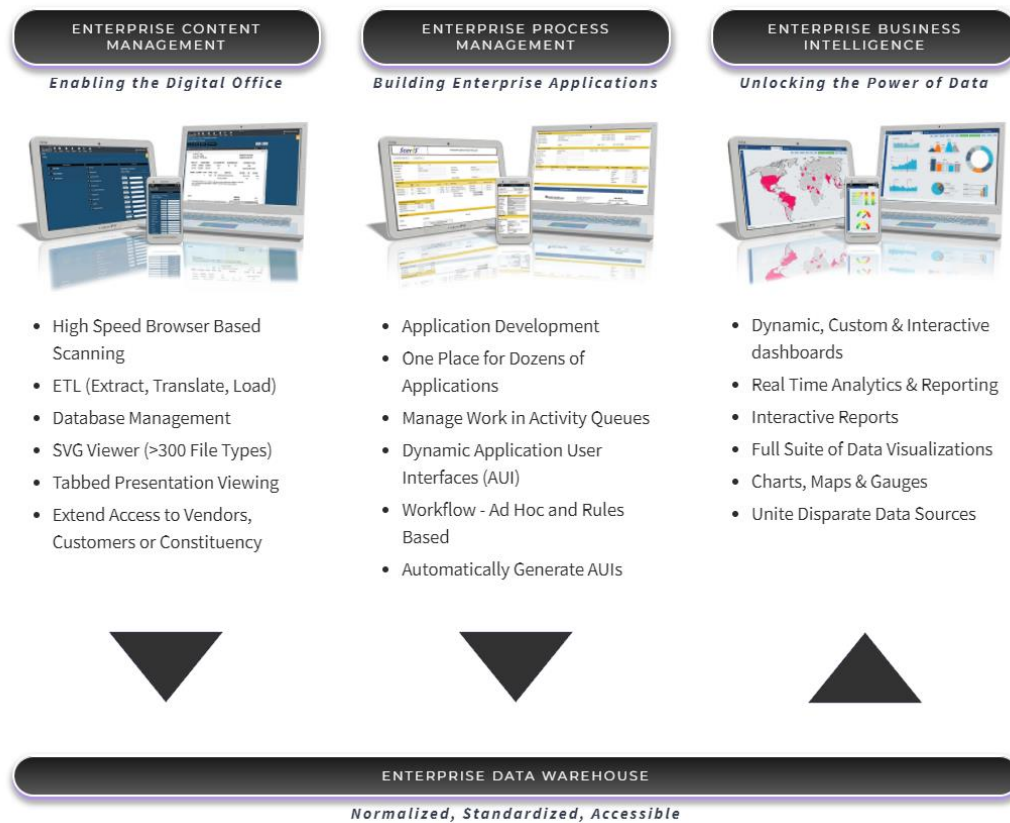
(<https://www.sceris.com/etcetera-platform/>)

ETCETERA® is a Multi-Purpose Enterprise Platform first imagined along the lines of an 83-Function Swiss Army Knife for business systems. Customers with the ETCETERA® Platform reinvent their users' experiences. Configure unlimited dashboards, visualizations, reports, applications, online business processes and manage an unlimited number of document classes. Use the ETCETERA® platform to develop your Data Warehouse. Besides creating a competitive advantage, with ETCETERA® you will avoid future single-use point system purchases, decommission existing point solutions, reduce infrastructure, reduce support, replace orphaned systems and reduce costs. ETCETERA® improves IT's contribution and value to the enterprise.

Licensing for users for the ETCETERA® modules is available for named user or concurrent users. Project or departmental initiatives are often best served with a concurrent user model, and enterprise initiatives involving multiple departments and dozens, or hundreds of processes are often best served with a named user model. Customers starting with one license model can switch to the other with a \$250 license change and license costs reflecting the change in license fees between the two models (there are no refunds for license fees that are reduced by this change, but monthly or annual software maintenance fees are adjusted accordingly). Organizations benefitting from the grant program should utilize the named user model and get all the licensing they will ever need in place while the license fee is waived through this grant.

ETCETERA® is for this, that and everything else, etc, etc... ETCETERA®!

Deploy On-Premises or in the Cloud
Integrate with ERP/Core Applications
100% Web Based UI
Scalable
Secure
Configurable



With ETCETERA® customers get more accomplished with less cost, less effort and in less time. Solutions are deployed when they're needed, not at the end of budget or capital cycles with inevitable delays. Simple Concurrent User Licensing or Concurrent User Subscription gets you UNLIMITED EVERYTHING:

- | | | | |
|---------------------------------|---------------------------------|---------------------------------|------------------------------|
| ✓ Unlimited Named Users | ✓ Unlimited Transactions | ✓ Unlimited Dashboards | ✓ Unlimited Reports |
| ✓ Unlimited Applications | ✓ Unlimited Work Queues | ✓ Unlimited Data Sources | ✓ Unlimited Workflows |
| ✓ Unlimited Documents | ✓ Unlimited Indexing | ✓ Unlimited Retrievals | ✓ Unlimited Uses |

Enterprise Content Management (ECM) (<https://www.sceris.com/etcetera-ecm/>)

ECM Enables the Digital Office

- High Speed Browser Based Scanning
- ETL (Extract, Translate, Load)
- Database Management
- SVG Viewer (more than 300 file types)
- Tabbed Presentation Viewing
- Extend Access to Vendors, Customers or Constituency



ECM is the ETCETERA® (ETC) module for online browser-based document and file management for nearly any purpose. ECM is a fourth generation, mature, highly customizable product with new features that include:

- the elimination of a windows client,
- scanning in the browser at full rated speed
- the ability to store and access over 300 file types through a Scalable Vector Graphics (SVG) viewer supporting HTML5 and access on mobile devices.

ECM is a technology platform used to organize, acquire, catalog, and access documents and files of all types. Applications configured in ECM are customer-managed and organized in document classes that are defined by the client.

ECM makes content acquisition and access easy. Users access content acquired from different sources seamlessly within the application, and through content enabled EPM and seamlessly connecting other applications (such as the corporate ERP). APIs make document access and document exporting simple.

Database tables are easily configured and linked to E-Forms for data acquisition and the creation of reference data sources.

Tabbed Viewing provides for configuration of tabs and sub-tabs for the organization and presentation of documents (i.e. personnel folders, medical record folders, etc.)

Pack N Go packages documents for export. Pack N Go for Spreadsheets assembles complex document sets based on data in spreadsheets and creates links between spreadsheet items and document sets.

Automated Document Assembly and Delivery (ADAD) is a module for automatically packaging one or more documents and automatically emailing.

Post to Host is a module for configuring data file exports including EDI/ANSI X12 file formats from data stored in ECM.

AutoRUN is a module for scheduling and automatically managing processes.

Enterprise Process Management (EPM) (<https://www.sceris.com/etcetera-epm/>)

Applications for the Enterprise

- Application Development
- One Place for Dozens of Applications
- Manage Work in Activity Queues
- Dynamic Application User Interfaces (AUI)
- Workflow – Ad Hoc and Rules Based
- Automatically Generate AUIs



EPM is the ETCETERA® (ETC) module for application development and process management. Develop online browser-based applications for task management, case management, business processes and accounting processes, and to enable mobile workers. With EPM, organizations can rapidly design, develop and implement online work processes that include automated processes, online user interfaces, data capture and validation, content capture, work routing and validation, rules-based workflows and offline to online process synchronizations.

EPM presents a task focused environment since the feelings of the user generally depend upon having a successful experience in accomplishing the task at hand.

EPM is designed to help users easily and efficiently attend to and complete all of their work tasks from within just three presentations.

Enterprise Business Intelligence (EBI) (<https://www.sceris.com/etcetera-ebi/>)

ETCETERA® EBI is the platform for self-service Business Intelligence with Dashboards, Visualizations and Reports for the enterprise. The ETCETERA® EPM and ECM platforms easily accumulate relevant enterprise data into the ETCETERA® Data Warehouse. Additionally, unite disparate data across databases for Virtual Data Warehousing and seamless presentations.

- Empower Users: Built for rapid deployment and user developed dashboards (without IT), BI and data discovery helps users make data driven decisions.
- Responsive Design: 100% web-based interface responds to the user's behavior and environment. Use EBI on any device, anytime, anywhere.
- Seamless Integration: Automatically normalize data acquired from multiple data sources and combine data from disparate databases in presentations.



MSaaS – MANAGED SOFTWARE as a SERVICE

MSaaS provides for a hosted environment for ECM users. During the period of the license grant, MSaaS pricing is discounted to reflect the granted portion of the software.

MSaaS is a multi-tenancy environment that allows for tenants to utilize different licensing models (some use named user licensing, others use concurrent user licensing). In this environment, ScerIS users are used (there is no Active Directory or SAML integration).

Unlike nearly every competitor in this space, the ScerIS MSaaS environment provides each client with a separate database rather than commingle client data in a single database.

ECM functionality is available and includes seamless access to documents from other applications such as an ERP, EHR/EMR, LIS, FIS and other core systems.

An easily configured Tabbed Presentation organizes documents in a familiar fashion to paper files for Human Resource, Medical Record, Client Files, Project Files and similar documents.

- **Scanning:** Scanning occurs in the browser. Scanned documents can be viewed as thumbnails in ETCETERA® Document Manager where documents can be segmented, or pages joined to create documents. Pages can be flagged for rescanning and a page(s) missed during scanning can be scanned and inserted into the appropriate page position in a document.
- **Importing:** Files can be imported. This can include documents scanned on multi-function devices, or native files such as Word, Excel, Email, CAD/CAM, and other files. Print files from host applications (ERP, EMR, LIS, etc.) can be imported (and indexing from print files can be completely automated). Importing a print file (ASCII formatted) is as simple as dragging the file(s) to the document class in which it will ultimately be stored.
- **Indexing:** Scanned documents and imported files can be indexed. Some index automation is available. Select the batch of documents for indexing and based on the association of the batch to a document class the appropriate cataloging labels will be shown. Simply add data to these labeled fields to index each document. If backfilling data from a file or other data source, just enter the one or two unique values needed to apply the look-up table which will fill in all the other required index fields.
- **Online Documents:** Conducting a search to find the files or documents you require is easy.
 - Select the document class you want to search and select the search icon. This will present the index values available for your search criteria.
 - Enter the search values and select search.
 - Select the index values to display in search results by checking the box to the right of the index value.
 - Determine the order in which the search index fields are presented just by moving the Index labels up or down. (Search preferences are automatically maintained by the system for each user, so the next time the user searches the same document class all of their preferences are preset. Of course, users can change these preferences at any time.)
- **Viewing Documents:** The ETCETERA® Document Viewer provides for a Scalable Vector Graphics (SVG) presentation of native files and JPEG presentation of graphical files in a viewer that works in the browser and on mobile devices. One advantage of SVG is that the files can be viewed on mobile devices, and on desktops and laptops without the need to call an application to view the

file. Zoom in and zoom out on SVG images and they automatically repixelate to provide clear, easily viewed images.

- **Viewing Multiple Documents:** Select multiple documents and the viewer provides easy navigation from one document to the next. If the document has multiple pages, you will see that multiple pages are available for viewing. Viewing of multiple document types selected in the search results is simply handled by the viewer.
- **Viewing with Tabbed Presentation:** Documents can be automatically assembled under tabbed labels to simulate their organization in typical paper files.
- **Managing the Release of Information (ROI):** Some organizations require documentation pertaining to releasing files to third parties. For any document class, the ROI is setup to require users releasing documents to third parties to complete the fields prior to releasing the file for download or for emailing.
- **Security:** ScerIS Authorization Services (AUTH) is managed by OPS at your direction. AUTH provides user authentication and authorization and serves as the access and permissions subsystem for your document classes (for integration with Active Directory, please refer to ScerIS Hybrid Cloud/Private Cloud offers).
- **Data Export:** Searches create search results, and for many these search results provide all the information that's needed for reporting purposes. Search results can be downloaded and viewed in Excel, Notepad and other applications available on the user's desktop at any time.
- **Audit Trails:** User actions including scanning, importing, indexing, search attempts, search results viewed, documents viewed, documents exported can be tracked. Several standard audit reports are available through your OPS support tech.

HOSTED SERVICES

ScerIS hosts ETCETERA® as well as customer mission critical applications and provides business continuity services to its customers.

ScerIS Cloud Services include advanced server virtualizations and converged infrastructure solutions to address the widest of customer requirements. Used for multi-tenancy, hybrid and private cloud environments for ScerIS software deployments, the Infrastructure as a Service (IaaS) offering also provides customers with a hosting alternative for their core applications and Microsoft subscriptions.

Integrated High Availability (HA) failover and resilience is provided at both the virtualization (HA cluster) and hardware layers. There's no need for complex and expensive clustering software or additional server, hypervisor or application licenses for failover servers.



Managed Cloud Services/IaaS (<https://www.sceris.com/iaas-paas/>)

Infrastructure as a Service (IaaS) provides physical computing resources and the ability to scale services up or down to meet customer requirements. Physical and/or virtual servers are available with a number of standard configurations along with disk for boot drives and file or object storage.

Platform as a Service (PaaS) expands upon IaaS providing operating system software, SQL and other Microsoft software products for customers wishing to pay monthly rather than install their licensed software products, but in this environment, customers can use their licenses if available to reduce or manage costs.

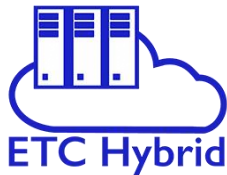
ScerIS IaaS/PaaS is provided in Equinix data centers where these resources are managed and available to customers who install and manage their operating systems and application software(s).

The Egenera Processing Area Network (PAN) data center management software enables resource provisioning, and management and protection of the IT infrastructure. This software provides powerful management and policy-based automation so that ScerIS can offload routine management tasks, freeing the ScerIS staff and improving the service levels delivered back to ScerIS customers.

PAN Manager® simplifies datacenter infrastructure and management by creating flexible pools of compute, I/O, networking and storage resources. PAN Manager's VMI technology provides one click provisioning of both physical and virtual servers –without the need to separately license, pay for and manage a hypervisor. From the PAN manager GUI, individual resources from these pools can be assigned a profile or personality. Each profile contains the application configuration and service level requirements. Once a profile is activated, PAN manager will actively monitor and automatically manage the infrastructure in order to meet the capacity, availability and response time requirements set by the customer.

This software's powerful discovery, server creation, High Availability and Disaster Recovery facilities provide a wire-once, always-on environment that supports both virtualized as well as native operating environments.

ETCETERA® Hybrid Cloud (<https://www.sceris.com/etc-hybrid-cloud/>)



Organizations desiring a solution for more than one department or enterprise, or that have many users but limited concurrent users, ScerIS provides the ETCETERA® Hybrid Cloud. This environment provides a dedicated application server(s) that support ETCETERA® modules which are licensed or subscribed. Server and storage resources are configured to your requirements and adjusted as needed. ETCETERA® is the ScerIS software known as the platform for everything else.

ETCETERA® provides the platform for online applications that are deployed to handle nearly any business process not performed by your ERP or other core applications and can include key performance indicators, dashboards, visualizations and reports. ETCETERA® provides the environment for developing applications, creating work queues for different business processes, presenting pending work to individuals in named work queues, and provides users with the ability to start any business process. This environment also includes document management, content management and content enabled work processes. Implement the components of the ETCETERA® platform that meet your needs to manage your monthly costs.

ETCETERA® Private Cloud (<https://www.sceris.com/etc-private-cloud/>)



Organizations desiring a hosting solution for more than one department, for the enterprise, that may require significant simultaneous access by many concurrent users, or that require AD or SAML integration select the Private Cloud environment. This environment can provide clients with physical isolation at all levels of the cloud. This environment utilizes ScerIS' IaaS to provide a fully isolated, secure, dedicated private application server(s) for their applications and for ETCETERA® modules which can be licensed or subscribed. Server and storage resources are configured to your requirements (virtual or physical server environments) and adjusted as requirements change. In a ScerIS Private Cloud, all servers including SQL server are dedicated to the client, and clients can utilize their server and SQL licensing to further reduce costs.

Business Continuity Services (BCS) (<https://www.sceris.com/bcs/>)



ScerIS Global Access

Source Location Flexibility, ScerIS provides backup (BaaS) and disaster recovery (DRaaS) services with a highly-available environment deployed across multiple datacenters. These datacenters are independent clouds in separate locations with numerous redundancies for hardware, power, and connectivity. Source locations can be ScerIS host environments or your on-premise locations.

Off -Cloud: for on-premise infrastructure and applications using a VPN or dedicated connection.

On-Cloud: for hosted applications running on the ScerIS cloud with protection in another datacenter.

ScerIS CONSULTING SERVICES

ScerIS provides a wide range of Consulting, Implementation, Training and Support services designed to help customers enjoy an extraordinary experience.

Principal and Senior Consultants provide guidance that often leads to significant reductions in cost and improvements in profitability. Developing actionable intelligence provides leadership with up-to-date key metrics valuable to accelerated decision making. Determining how best to optimize business processes throughout the enterprise leads to best practices reflecting the uniqueness and competitive advantages of each customer.

Business Process Consultants and Business Analysts help customers define and deliver business information and process optimization solutions. Drawing on many years of experience, business process knowledge, qualitative and quantitative techniques and transformational technology capabilities, ScerIS's professional services teams help customers improve performance through the:

- Analysis of existing business processes (Business Analytics – Collection of the Facts).
- Development of plans for process improvements (Collaborative Methods for Innovating).
- Implementing solutions to achieve performance requirements utilizing ScerIS workforce productivity improvement platforms (Getting Results).
- Design and implementation of infrastructure (Cloud).

ScerIS solution teams provide value through their comprehensive input to the solution design and through strategically integrating solutions with customer processes and technology. As a virtual extension of each customer's organization, ScerIS guides customers through an investigation of the possibilities and subsequent project deliverables.

BUSINESS PROCESS OUTSOURCING

ScerIS Business Process Outsourcing (BPO) services are designed and implemented unique to each customer's requirements.

ScerIS's BPO workforce is a seamless extension of each customer's environment. These services leverage the core capabilities and resources of ScerIS Service Center operations including scanning, automated data capture/data validations, digitized workflows and electronic document repositories. Tracking of customer and ScerIS activity in online services supports audit and compliance requirements.

ScerIS outsourced business solutions include:

- Vendor Invoice Processing (PO and Non-PO)
- Claims Processing (CMS1500 and CMS 1450)
- Payment Processing (EOB/creation of 835)
- Payment Processing (Lock Box)
- Survey Processing
- Donor/Pledge Processing
- Lease/Contract Management
- Deposit Operations Item Processing
- Statement Rendering/Generation/Distribution
- Managing Customer/Patient Portal
- Managing Vendor Portal

DOCUMENT CONVERSION SERVICES

ScerIS outsourced document conversions span multiple document types. Services include scanning, document conversions, classification, indexing and hosting. ScerIS service center employees are based in the US, employing high speed equipment and certain automation technologies to effectively compete with offshore service companies. But perhaps more important, ScerIS provides a quality service that is unmatched by offshore resources. Departments that are regularly processed include those in accounts payable, accounts receivable (billing and lock box services), payroll, human resources, medical records, legal, engineering and materials management. Other documents frequently processed include free care, donor records, clinical trials, physician credentialing, books, bound materials, mortgages and loans, job files, and radiology films. ScerIS also converts microfilm to digitized images.

Outsourced Document Conversions Include:

- Hosted/Online Document Access
- Document Scanning and Indexing
- Automated Indexing (OCR, ICR, BCR, OMR)
- Microfilm Scanning
- Microfiche Scanning
- Book Scanning
- Aperture Card Scanning
- Map Scanning
- Engineering Drawings Scanning
- Radiology Scanning
- Prepless Scanning (Medical Records)
- Document Shredding
- System Conversions