upland

InterFAX Partner Conference

October 18-19, 2023

Day 1

2023 InterFAX
Partner Conference

Welcome
Shawn Freligh

Business Updates
John Hewitt

Marketing Updates
Ginger Swann

Product Updates
Fani Antora Dima

Lunch

Partner Presentations I

Coffee + Tea Break

Partner Presentations II

Break

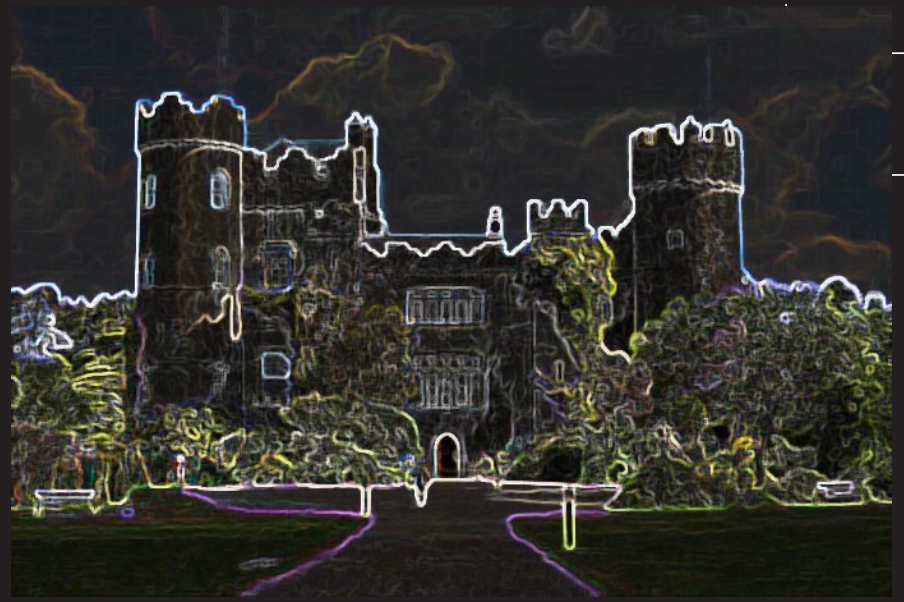
Dinner

Welcome!

Shawn Freligh
SVP and GM

Welcome to the

InterFAX Dublin 2024 Partner Conference



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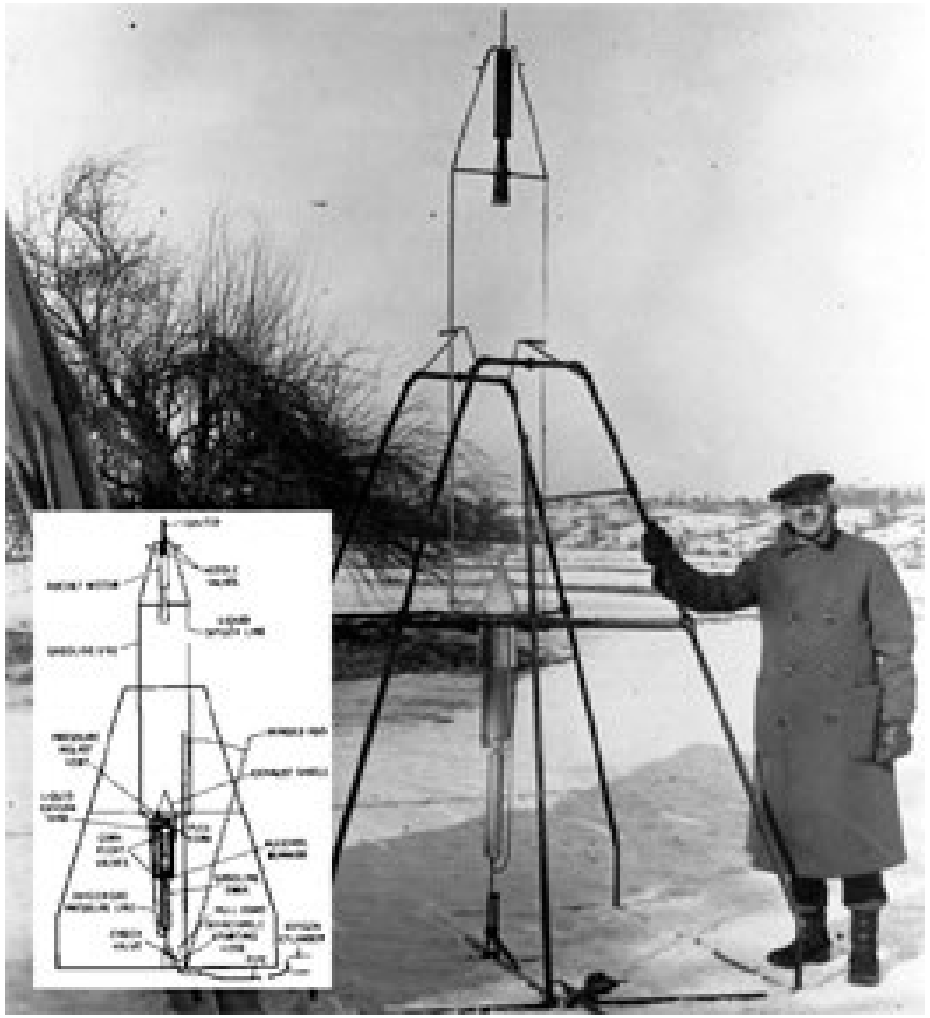
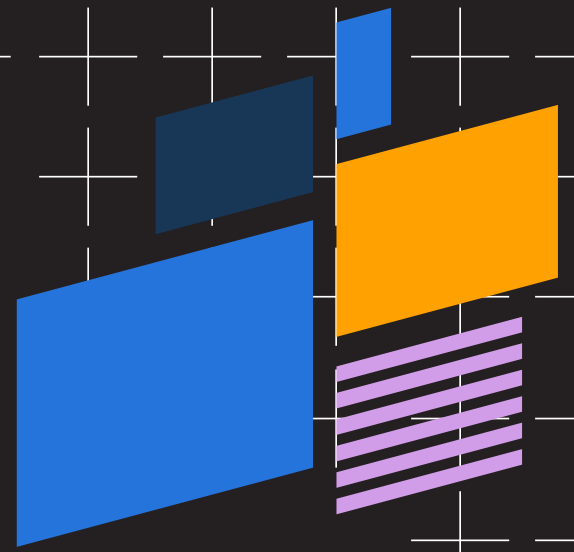


United States
Discovery

Upland Today



Upland Product Library

Our products solve last-mile business problems for global enterprises

We deliver the plug-in processes, reporting, and job-specific workflows that major cloud platforms and homegrown systems don't provide.

Buying Centers

Business Operations
Contact Center
HR & Legal
Information Technology
Digital Marketing
Project Management
Enterprise Sales

- AccuRoute
- Adestra
- Altify
- BA Insight
- BlueVenn
- Cimpl
- ComSci
- Eclipse PPM
- FileBound
- InGenius
- Intelligent Capture
- InterFAX
- Kapost
- Localytics
- Mobile Messaging
- Objectif Lune
- Panviva
- PostUp
- PowerSteering
- PSA
- Qvidian
- Rant & Rave
- RightAnswers
- RO Innovation
- Second Street
- Ultriva

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Why global businesses choose us

Choice

Comprehensive product library delivers critical “last mile” capabilities at enterprise scale with rapid time to value

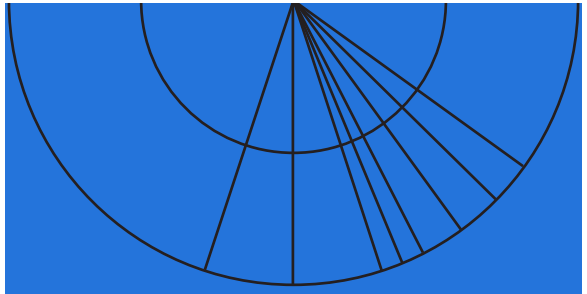
Flexibility

Configurable to work with current infrastructure, extend existing platform investments, and retire home grown tools

Value

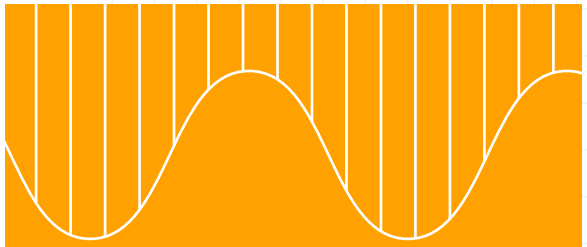
Well-capitalized, long-term partner enables vendor consolidation and bundle pricing with global innovation, enhanced security, service, and support

Our values



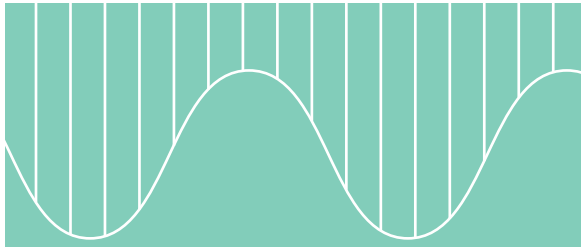
Customer value is our fuel

Value is making a difference for our customers each and every day. That's what powers our business and energizes us.



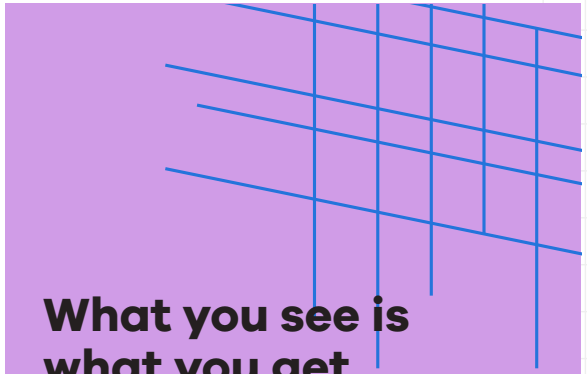
Actions speak louder than words

When challenges arise, we rise to the occasion. We roll up our sleeves, get to work, and get the job done.



Experience is a superpower

We are a team of experts who know how to work together to tackle real challenges and create success.



What you see is what you get

We are genuine, honest, and grounded in what's possible. We're intentional in everything we choose to do.

People are our most important asset

We are humans helping other humans, and want everyone to feel seen, respected, and heard.

Our global presence

Our teams span multiple continents, and our remote workforce stretches even further. It's like a giant mind-meld across thousands of miles and multiple time zones.

United States

- Austin, TX (*headquarters*)
- Boston, MA
- Cincinnati, OH
- Houston, TX
- Lincoln, NE

Canada

- Lachine, Quebec
- Ottawa, Ontario

EMEA

- Bristol, United Kingdom
- Bucharest, Romania
- Coventry, United Kingdom
- Dublin, Ireland
- Ede, Netherlands
- Tel Aviv, Israel

Asia-Pacific

- Bengaluru, India
- Melbourne, Australia
- Petaling Jaya, Malaysia

upland

Content Lifecycle Automation

We simplify everyday work by transforming content-centric processes to make businesses more efficient.

upland

AccuRoute

Activate your content

Capture, process and transmit documents securely

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Reliable for mission-critical needs

99%

customer support satisfaction score since 2015

1 million +

enabled users

100+

integrated endpoints – *unmatched in the industry*

24/7

support

FileBound

Power your documents

Document management system for reliable, user-friendly content workflow

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Demonstratable ROI with FileBound

Endless integrations

FileBound works with CRMs, HR systems, ERPs, SISs, and more.

Reliable and ready

Backed by AWS and Dell Boomi so you get what you need.

Say goodbye to tedious paper processes

Take archived records and day-forward processes digital to get the most out of your data.

∞

Unlimited scalability as your organization grows.

Qvidian

Driving questionnaires

AI-Powered security and compliance questionnaire management and response generation

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Demonstratable ROI with Qvidian

Quicker to final draft

Eliminate post process formatting

Robust reporting

70+ standard reports, plus the tools to build your own.

Unmatched content management capabilities

Organize the library, apply permissions per user and apply filters.

∞

Unlimited content storage space

BA Insight

Find it, summarizes it, get it

The power of AI-driven search

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Built to deliver value

Fastest time to value

$15K Average annual ROI per user within three months.

Unmatched connector catalog

90+ connectors that unite disparate systems & applications across your organization

AI agnostic

10+ AI, search engines, & common enterprise platform integrations out of the box

akumina amazon elastic LiveTiles Microsoft netdocuments servicenow

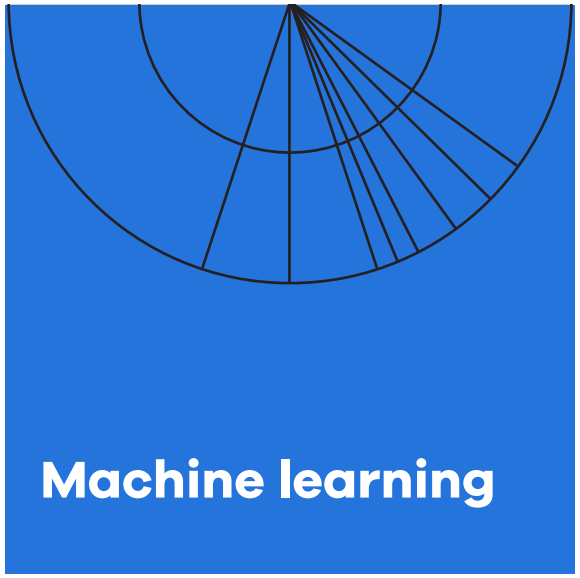
OH YEAH!

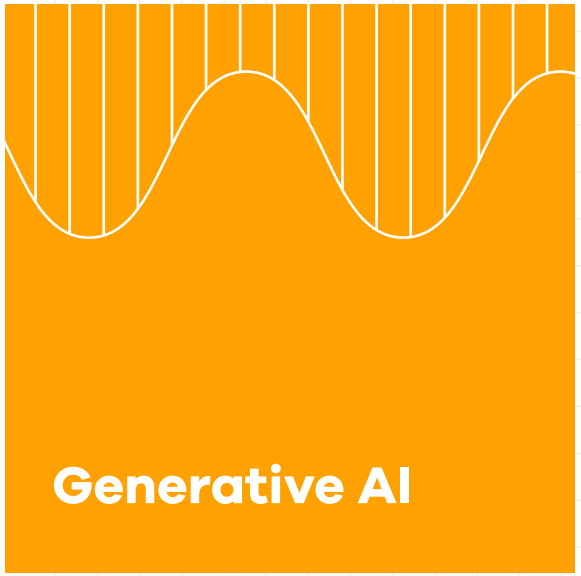
Now the good stuff....

Artificial intelligence, what?

InterFAX: AI -enable your faxes

Fax needs to be considered within the AI-wave – the technology is still relevant, but the processes it drives will evolve.





Value-added capabilities

PLATFORM CAPABILITIES

Base Application Features

- OCR
- Scan to: fax, email, network, self
- Scan to Cloud
- Routing Sheets
- Device Integration
- TIFF, PDF, MS Office
- Image Processing
- Data Sovereignty
- Simple UI

Intermediate Application Features

- Scan to Securezzz File *(e.g WebService, SP, O365)*
- Destination Navigation
- Barcode Reading
- Indexing (auto, prompted)
- Data Validation
- Batch Handling
- Broad integration/distribution *(well defined APIs)*
- Annotation & Redaction
- Expansive file types
- **+ Base Features**

Advanced Application Features

- Enhanced Security – PCI, Compliance
- Enterprise High Volume Capture
- Fixed Form Extraction *(Zonal)*
- Semi-Structured CX
- Unstructured CX
- Advanced workflow rules *(if/then)*
- Document Modifications *(reorder, rename)*
- Document Assembly
- Auto-Redaction
- Auto-Splitting
- Document Review/Rescan
- **+ Intermediate Features**
- **+ Base Features**

PROGRESSIVE FEATURE OFFERINGS

Investing in the Future

5

Additional operational staff

11

New research and development Uplanders

10+

Planned additional integrations

$3M+

Investment (Platform, Sales, Marketing and R&D)

Where can we put transformational investment?

Business Updates

John Hewitt
Director of Business Development

Fax Industry Market Projections

According to our latest research, the global online fax market looks promising in the next 5 years … with a CAGR of 6.72% during the forecast years.

As per the report released by Kings Research, the global **online fax market** size … is estimated to grow to **USD 12.32 Billion** by 2030, exhibiting a **CAGR of 12.75%** over the forecast period of 2023-2030. The industry is experiencing rapid growth due to the rising adoption of cloud-based storage and archiving functionalities, enabling users to access their faxes remotely. The increasing use of online faxing in a wide range of sectors can be attributed to factors such as the escalating demand for secure and fast communication.

Market Projections (continued)

The worldwide cloud fax market size is expected to grow from 770.48 million in 2023 to USD 2053.60 Million by 2033, at a Compound Annual Growth Rate (CAGR) of 10.3% during the forecast period.

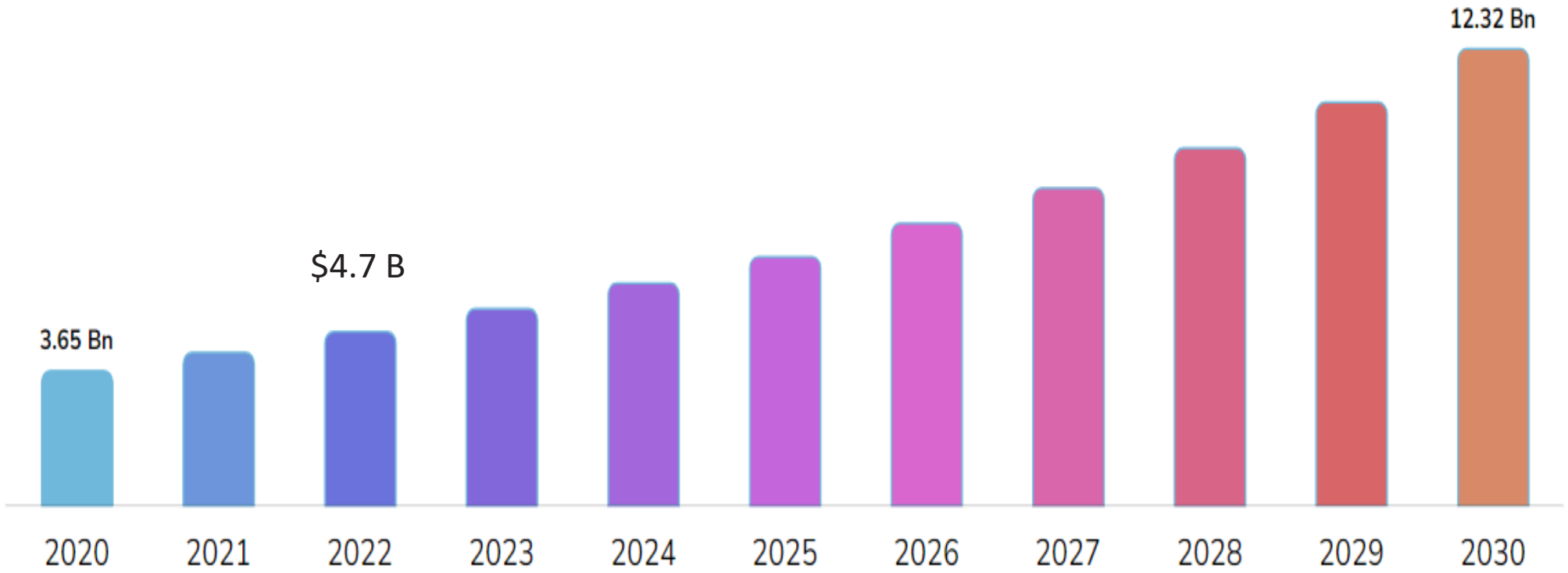
The global **fax machines** market is estimated to grow at a Compound Annual Growth Rate (CAGR) of 5.3% during the forecast period from 2019-2028. The growth can be attributed to factors such as rising demand for improved connectivity and rise in governmental regulations on data security which has resulted in increased adoption of digital communication systems, especially among government organizations and enterprises across the world.

Fax Server Market

The global fax server software market is expected to witness a CAGR of 8.5%. By 2026, market size estimates are around USD $6.1 billion, according to the latest research report by Verified Market Reports. The market is driven by increasing adoption of advanced technologies, such as cloud computing & virtualization, which has made it easier for organizations to deploy & manage fax services.

High Cost of Implementation and Maintenance Licenses must be purchased, & resources must be allocated to set up, configure & maintain the system, causing a significant barrier to adoption.
Interoperability Issues with Existing Fax & Telephone Systems Fax server software must be able to effectively communicate with existing fax & telephone systems to be useful. Unfortunately, many fax server software solutions are not able to due to incompatibilities or lack of support for necessary standards. This can limit the usefulness of the software and make it difficult for businesses to adopt it.
Continued Interoperability Issues with Network/Operating System Infrastructure

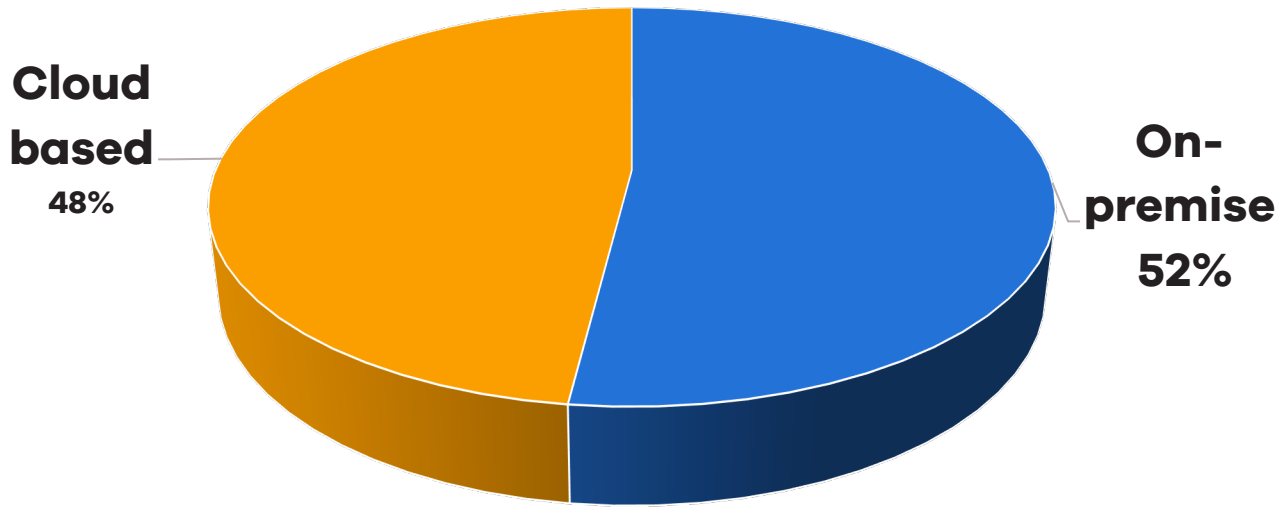
Global Online Fax Market Worldwide Growth Projections



KINGS RESEARCH

Current FAX Type Basis

2022 Study



On-premise includes:

- Fax machine
- Fax server
- MFP with fax boards

Aug 17, 2023

"Outstanding cloud-based HIPAA-protected FAX Service"

What do you like best about Upland InterFAX?

Upland InterFAX has not only been a great replacement for our on-prem solution(s) from acquired companies - centralizing into one service.

Their UI is very effective. They have an API to automate receipt of FAXs into our operational systems.

Their support is responsive, helpful, and effective.

What do you dislike about Upland InterFAX?

There are some elements of the account provisioning and reporting elements that they continue to work on that I would like to see improved - but far and away much better than other alternatives we reviewed.

Would DEFINITELY like to see InterFAX integrate an SSO solution into their native product!

Source - Capterra

IT ARCHITECT

Hospital & Health Care, 5,001-10,000 employees

Used the software for: Less than 6 months

Overall Rating	★★★★★ **5.0**
Ease of Use	★★★★★ 5.0
Customer Service	★★★★★ 5.0
Features	★★★★★ 5.0
Value for Money	★★★★★ 5.0
Likelihood to Recommend	10/10

Reviewer Source

Source: Capterra

April 8, 2022

"InterFAX Review"

Overall: easy to implement this product for our healthcare initiative with the government of Ontario. Amazing customer service - always responsive, available, and approachable. Very helpful.

Pros: Customer Service, Ease of use, Simple to implement. Excellent Support.

Cons: would like single sign on with O365 so users don't have to share a common account. they seem to keep locking the account when 100s of users are using the shared account. integrating with O365 would take care of this limitation.

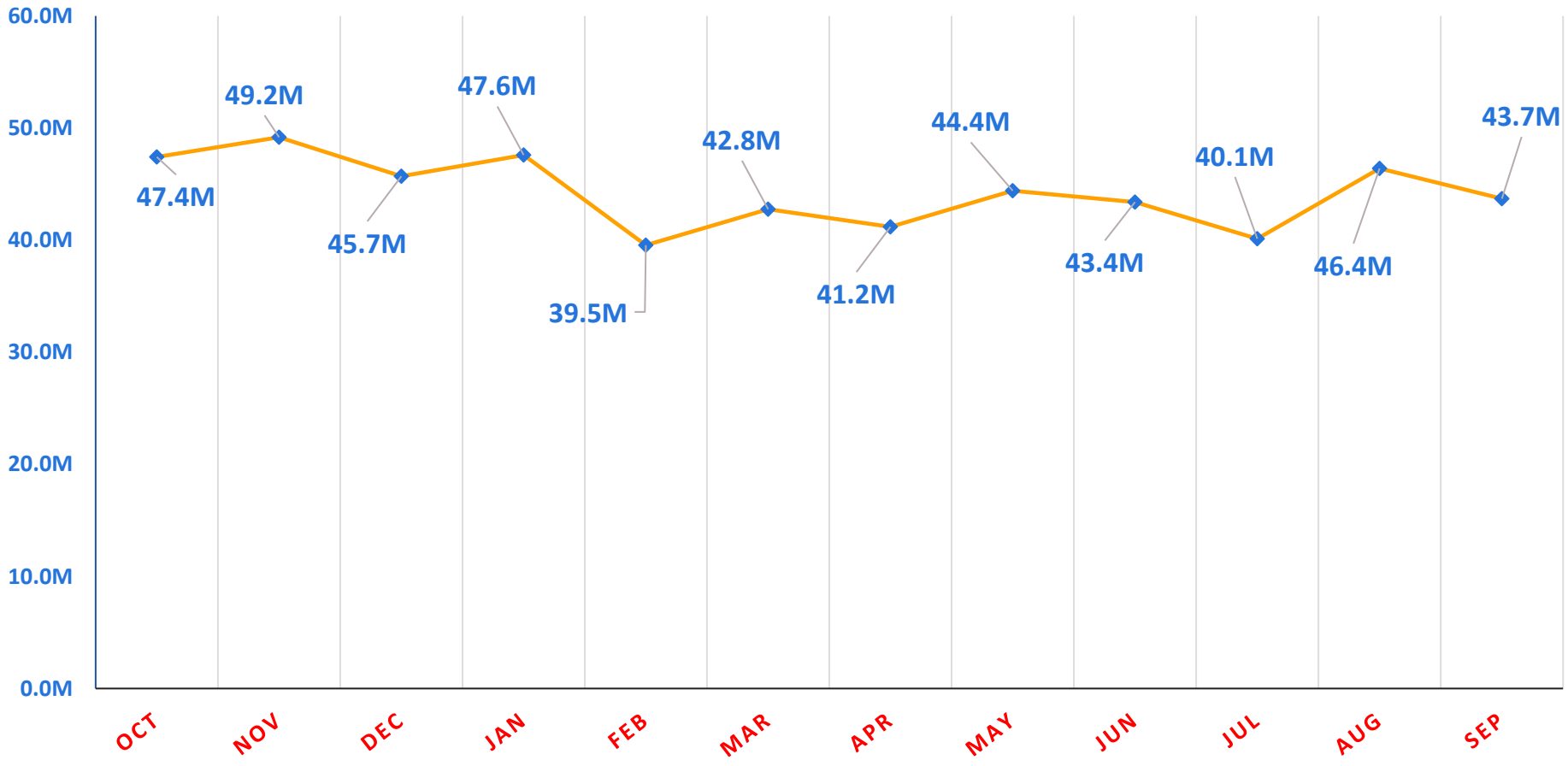
Reasons for Choosing InterFAX: Customer Service

Switched From: CocoFax

Reasons for Switching to InterFAX: Customer Service

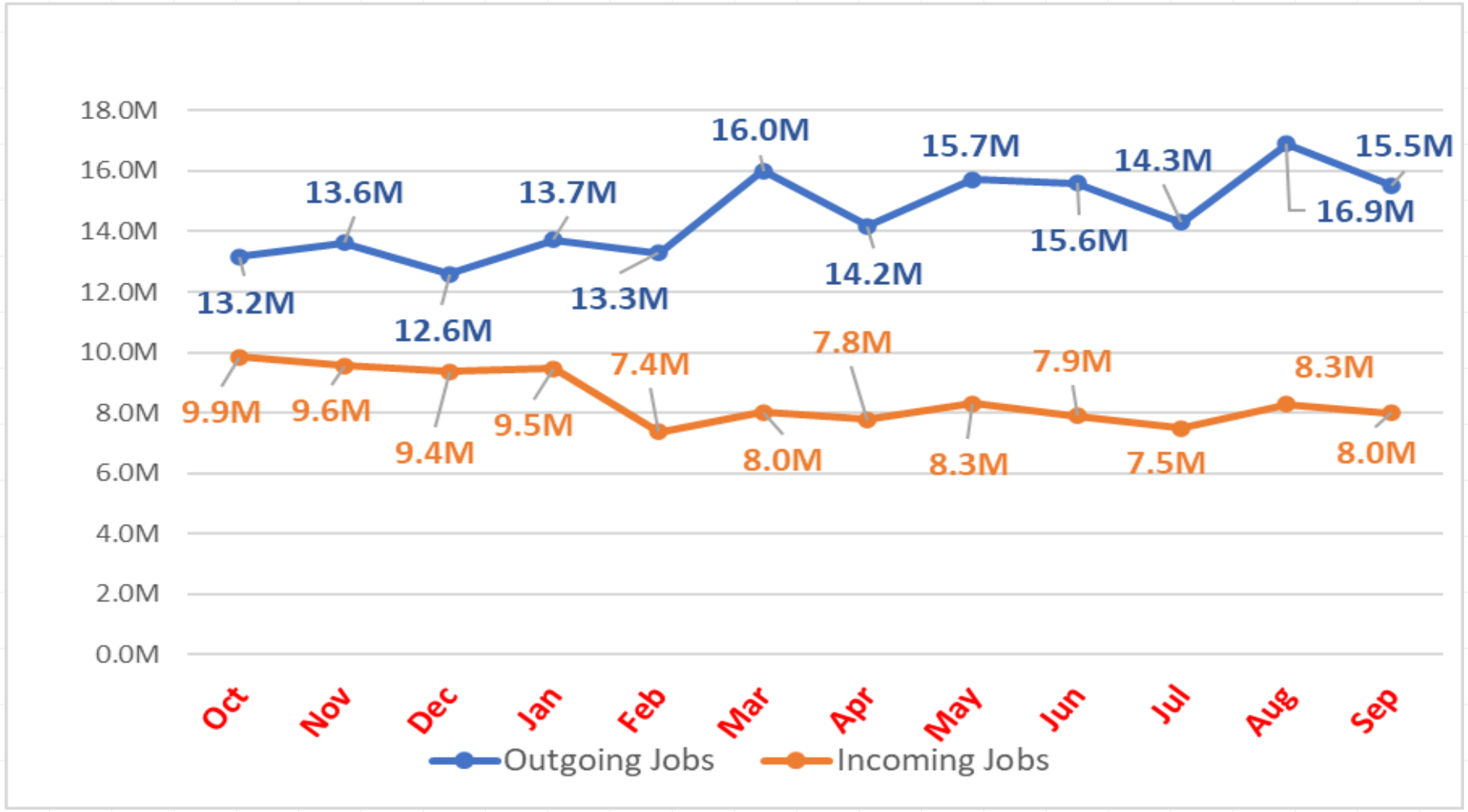
Monthly Unit Volume

10/2022 – 9/2023



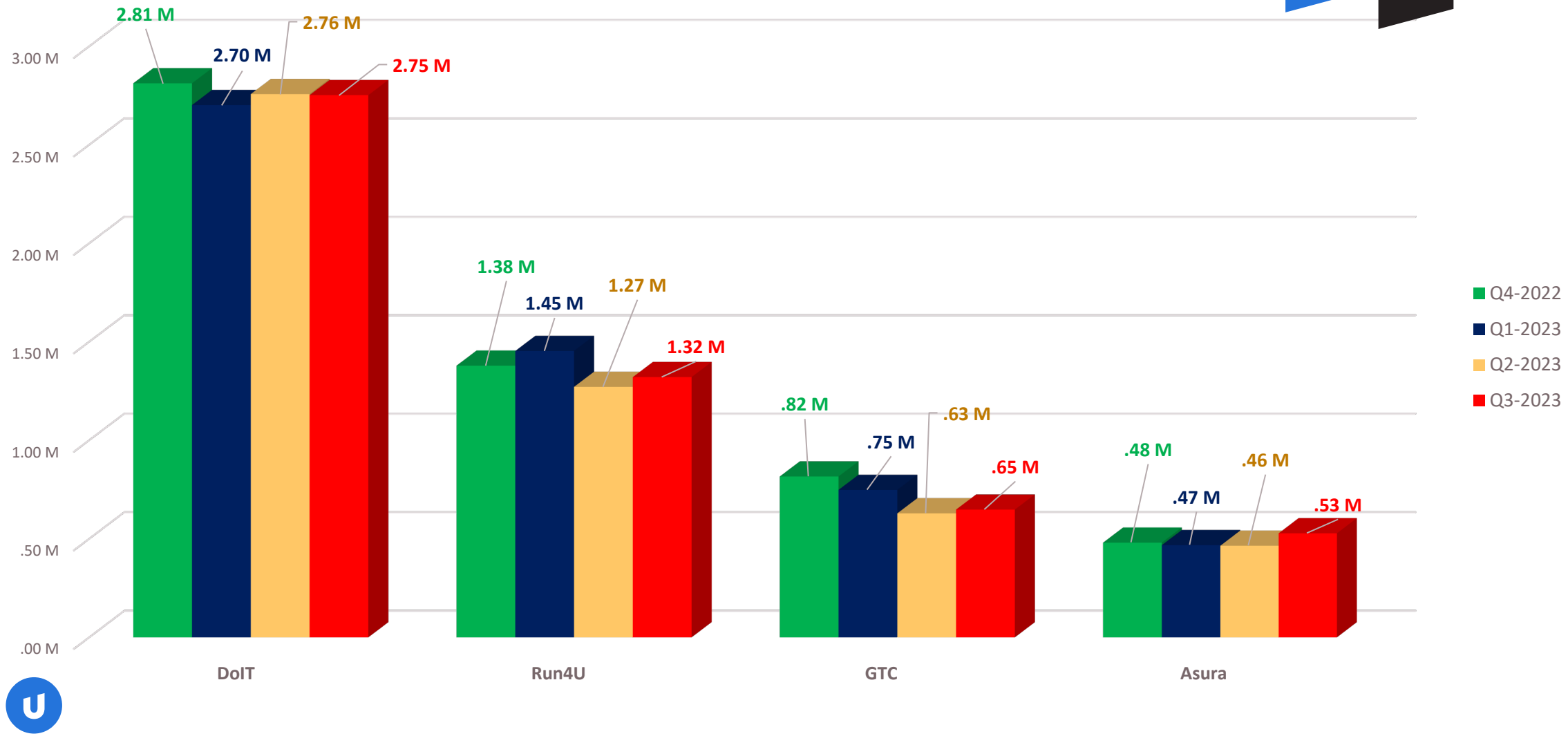
Total Outbound & Inbound Transactions

10/2022 – 10/2023



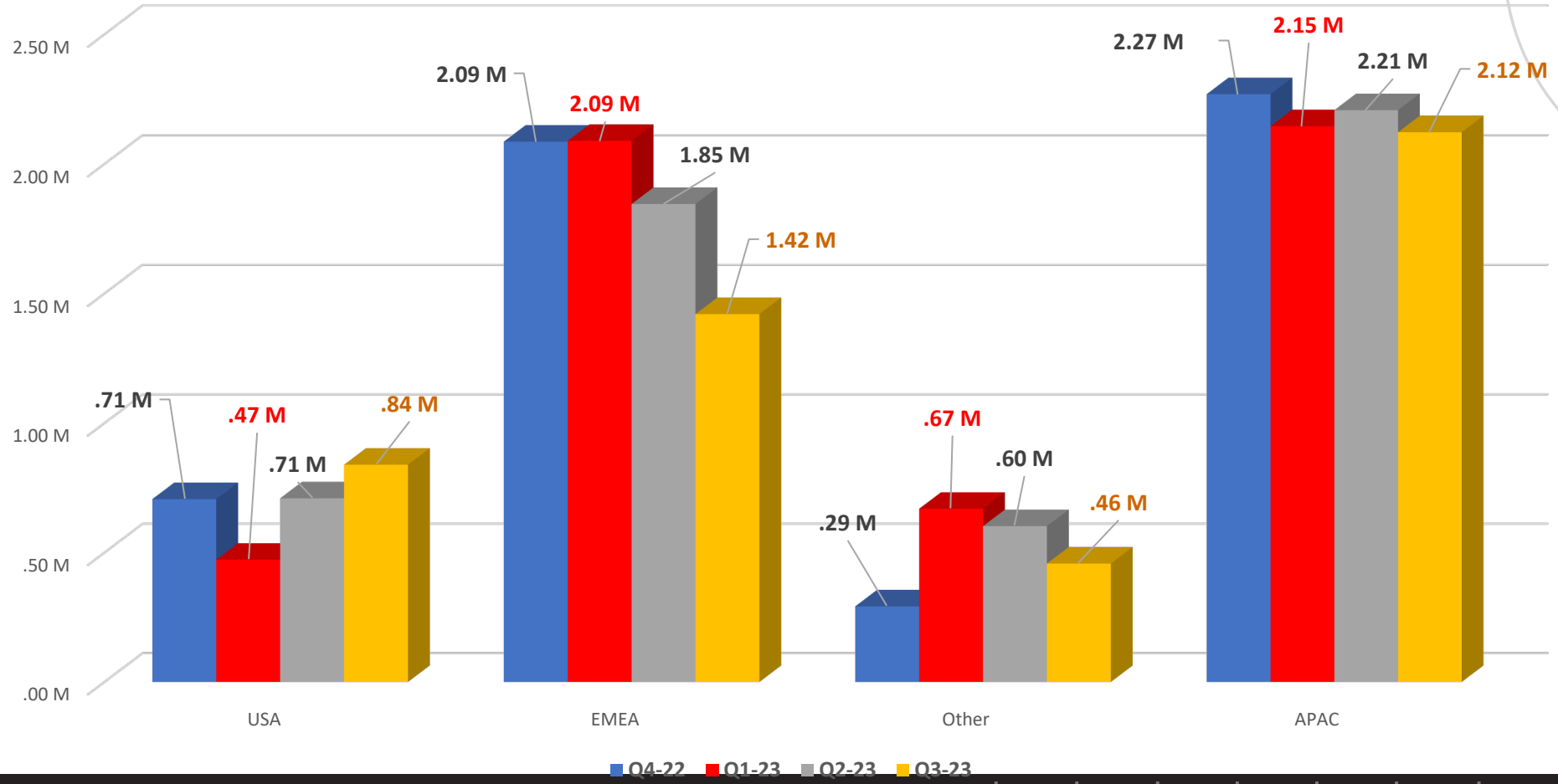
InterFAX Top Four Partners

Annual total pages by quarter



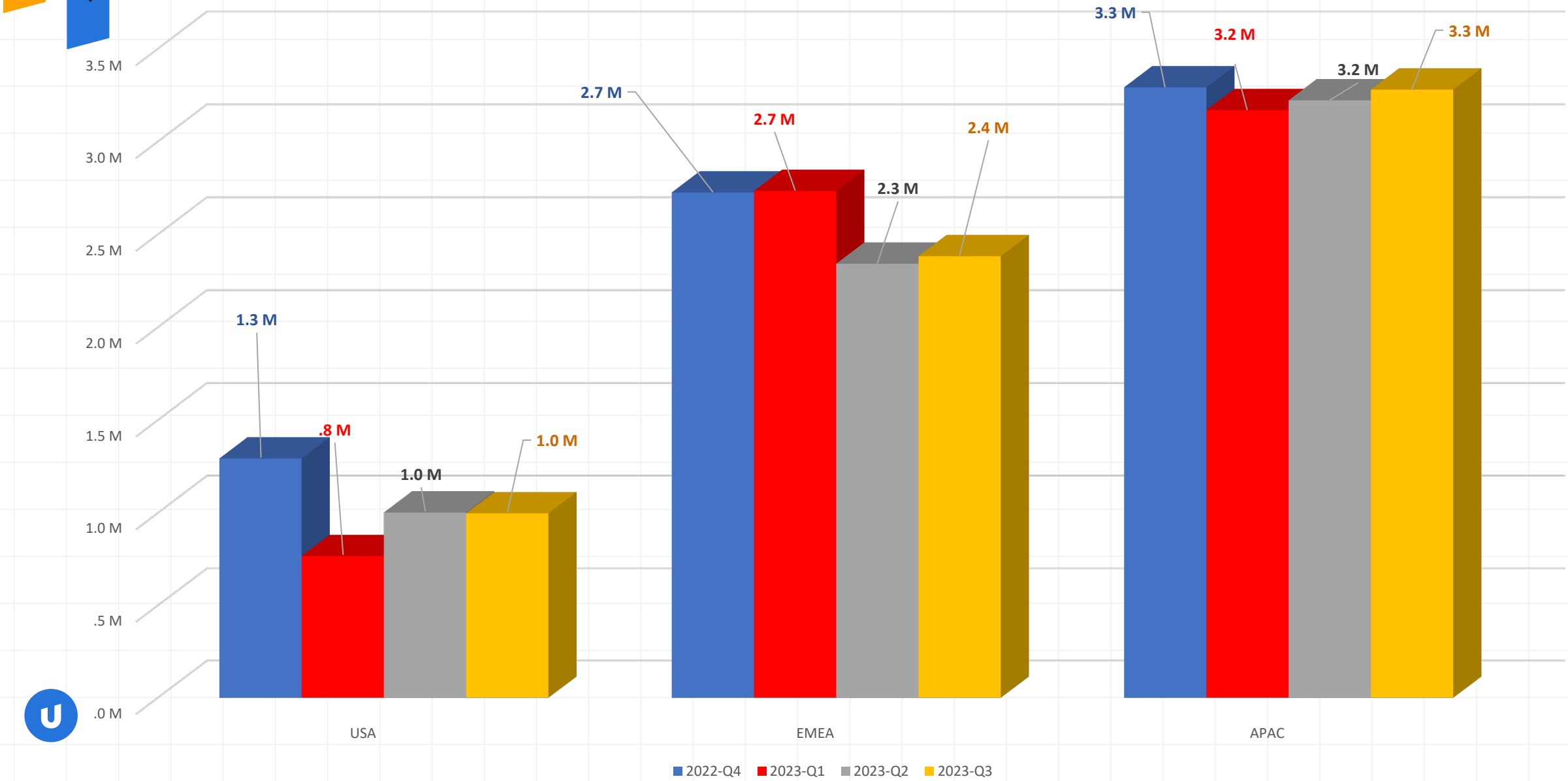
InterFAX Partners by Region

Fax Transactions – Past 4 Quarters (Combined Incoming/Outgoing)

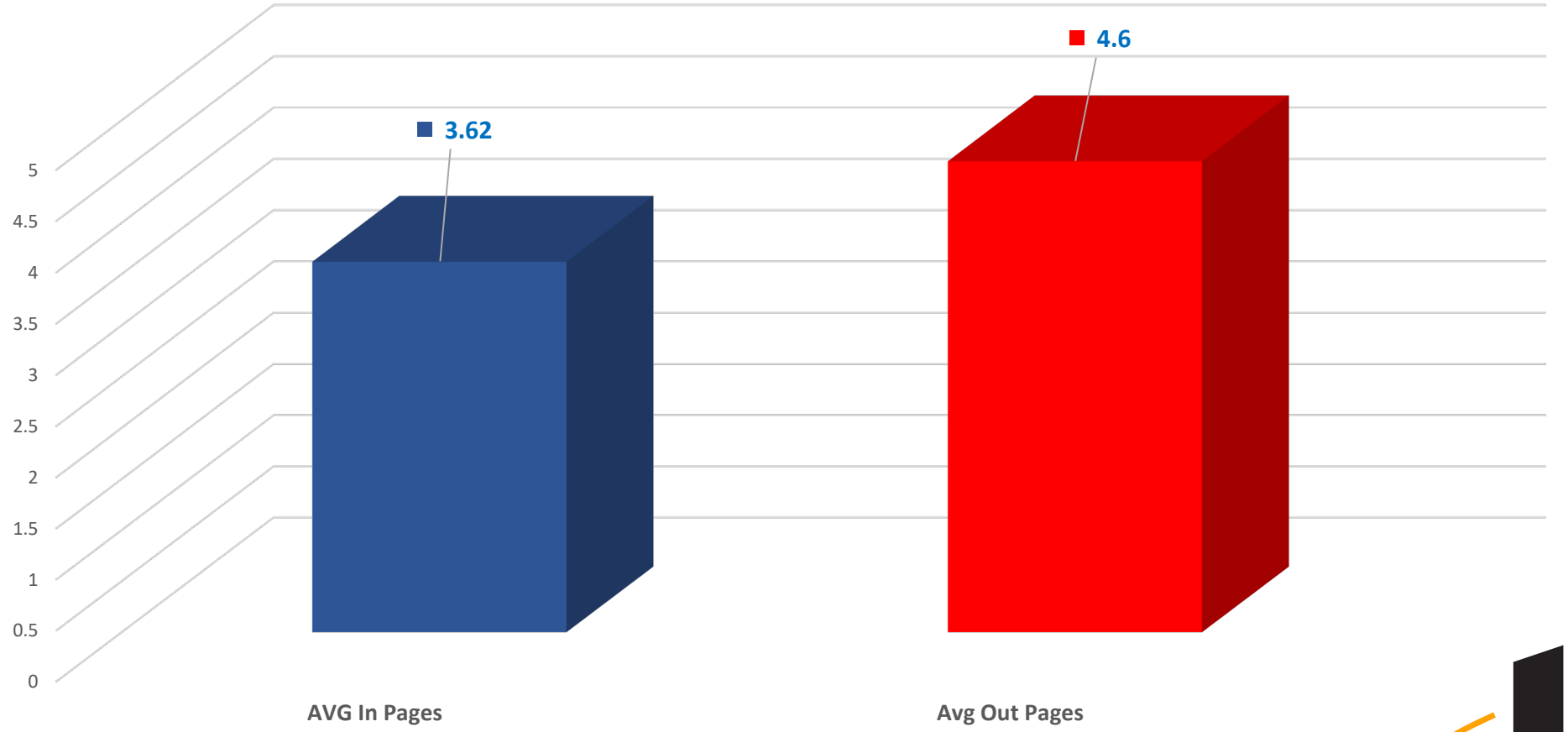


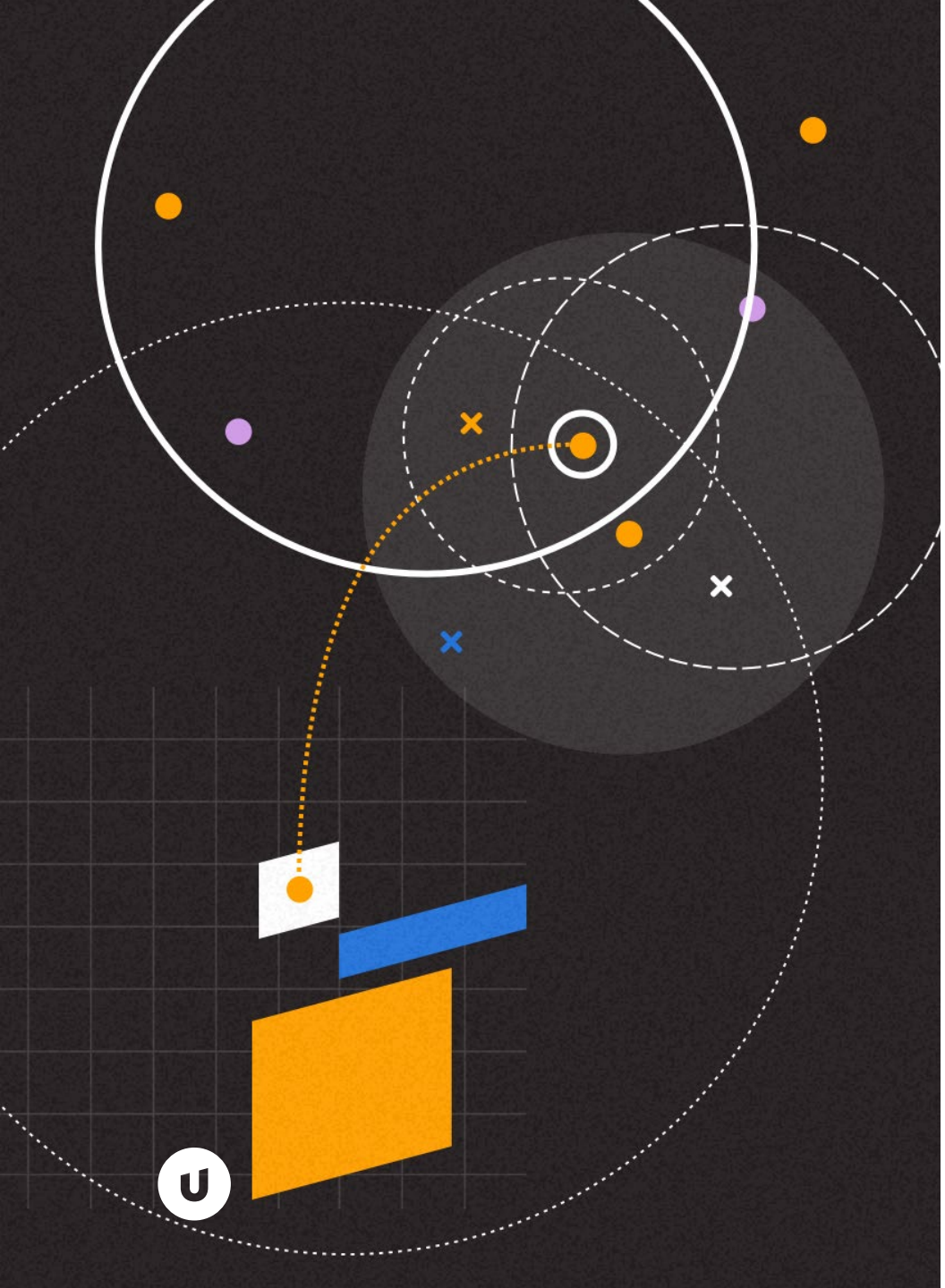
InterFAX Partners

Total Pages by Quarter & Region



Average FAX Pages per Transaction Comparison – Inbound/Outbound





Partner Discussion: Selling Fax Today

- What are the most important buying motivations for new opportunities?
- Who are your competitors?
- What is the one top business type that uses fax today in your area?
- How do your customers most use outgoing InterFAX?

upland

What are top buying issues to purchase InterFAX?

_____ Replace fax machines
_____ Reduce current cost
_____ Eliminate fax server
_____ Regulatory compliance
_____ Superior user interface/convenience
_____ Email to fax feature
_____ Print to fax feature
_____ Increased volume requirement
_____ Replace current vendor due to support
_____ Replace current vendor to reduce cost
_____ Audit trail feature

Konica Minolta North America

Upcoming coordinated activities

Dealer Launch Update – Oct 2023

- Training for KM Dealer Solutions Managers
- Marketing launch with success stories
- Dealer demo/internal use pack launch

Current User Marketing Campaign - Nov 2023

- First campaign Jan had 150 responses
- Vertical market focused
- Continued focus on POTS cost and

Inside Sales Launch with – Nov 2023

- Pro-active campaign to current user base
- 3 SMB packages for simple quotes

Launch Implementation Management Program

- Large user chargeable start-ups

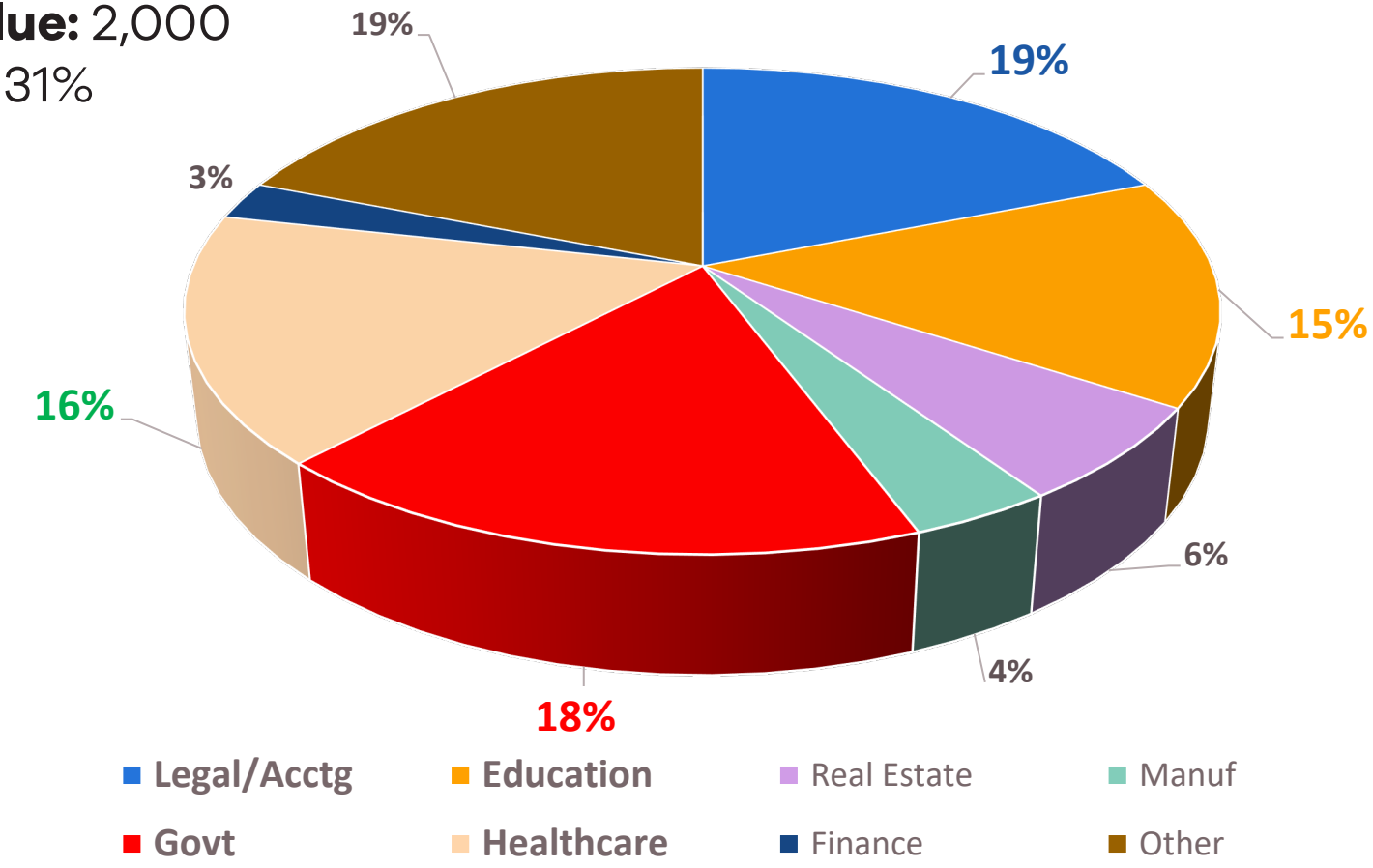
Background and status

- Launch: January 2023
- Quotes submitted: 265
- Accounts Closed: 84
- Current open opportunities: 184
- Average Annual Revenue per Sale: $2,050
- Close Rate: 31%
- Number of Active Dealers: 10

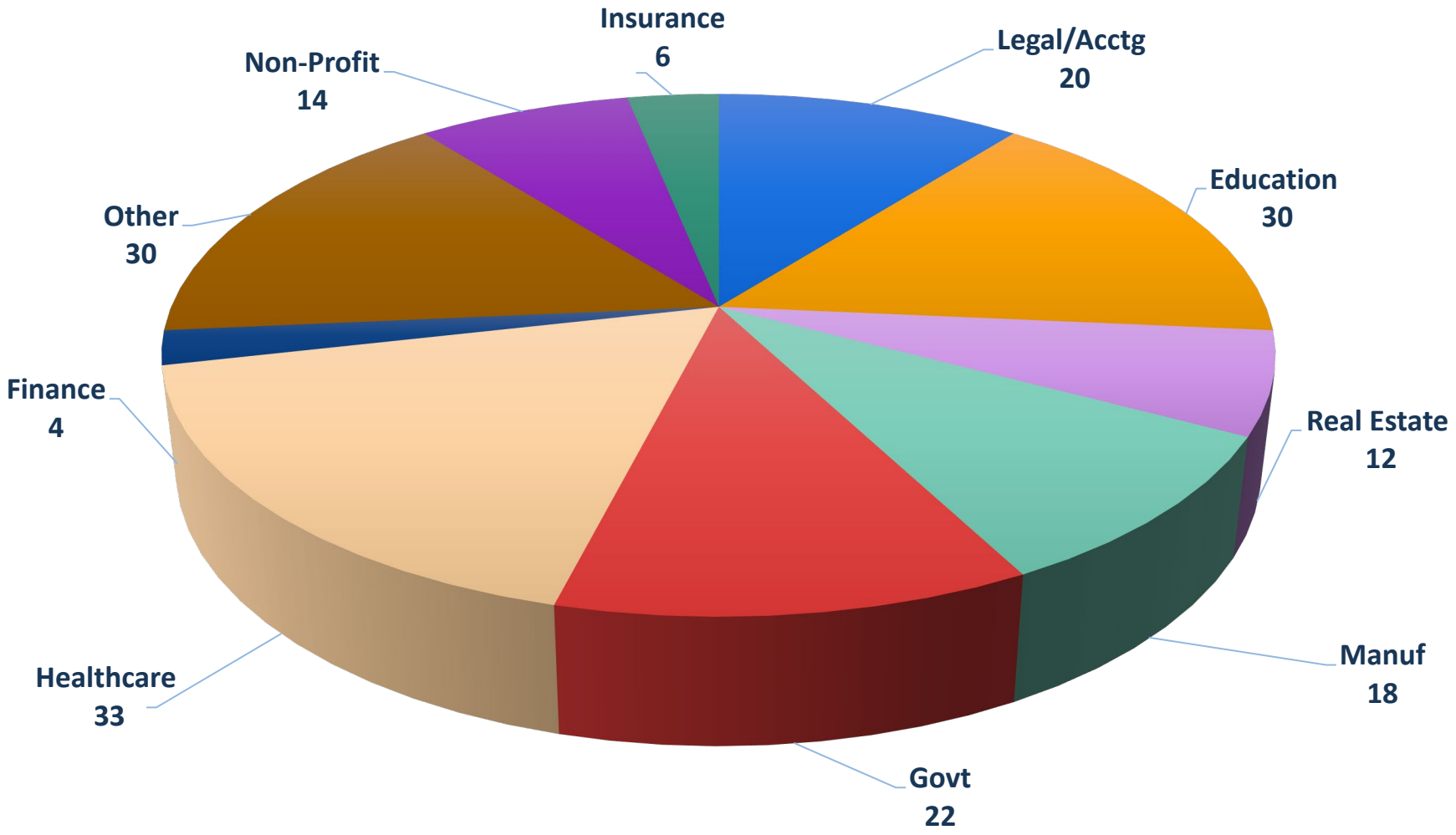
Konica Minolta U.S. 2023 Closed Accounts

Vertical Market Mix

Number of Closed Accounts: 84
Average Annual Revenue Value: 2,000
Close Rate from Opp/Quote: 31%



Konica Minolta U.S. Opportunities – Vertical Markets



Marketing Updates

Ginger Swann
Marketing Campaign Coordinator

Instead of one-way interruption, web marketing is about delivering useful content at just the right moment that a buyer needs it.

David Meerman Scott

Campaigns

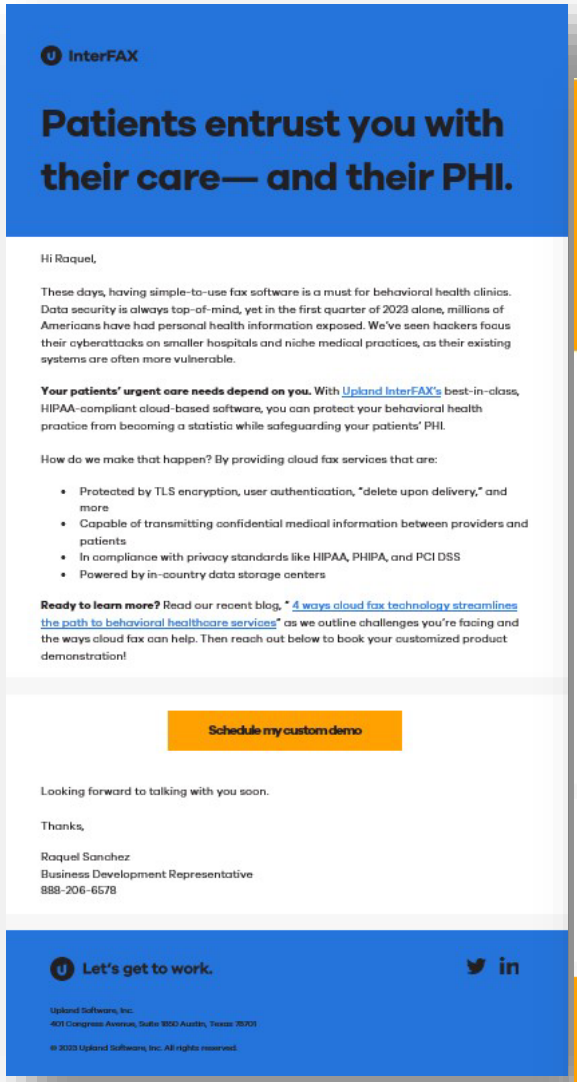
What industries rely on fax?

- Healthcare
- Behavioral health
- Finance
- Education

What makes up an InterFAX campaign?

- Email content (Series of 3 emails)
- Calendly campaign to set up meetings
- New industry webpage
- New industry-related resource (datasheet, brochure, video)
- Blog related to industry subject
- Social media images, messaging
- Landing page for paid media
- Ad content for Google, Bing
- Sequence for sales representative

Behavioral Health Campaign: Emails



InterFAX

Patients entrust you with their care— and their PHI.

Hi Raquel,

These days, having simple-to-use fax software is a must for behavioral health clinics. Data security is always top-of-mind, yet in the first quarter of 2023 alone, millions of Americans have had personal health information exposed. We've seen hackers focus their cyberattacks on smaller hospitals and niche medical practices, as their existing systems are often more vulnerable.

Your patients' urgent care needs depend on you. With Upland InterFAX's best-in-class, HIPAA-compliant cloud-based software, you can protect your behavioral health practice from becoming a statistic while safeguarding your patients' PHI.

How do we make that happen? By providing cloud fax services that are:

- Protected by TLS encryption, user authentication, "delete upon delivery," and more
- Capable of transmitting confidential medical information between providers and patients
- In compliance with privacy standards like HIPAA, PHIPA, and PCI DSS
- Powered by in-country data storage centers

Ready to learn more? Read our recent blog, " 4 ways cloud fax technology streamlines the path to behavioral healthcare services" as we outline challenges you're facing and the ways cloud fax can help. Then reach out below to book your customized product demonstration!

Schedule my custom demo

Looking forward to talking with you soon.

Thanks,

Raquel Sanchez
Business Development Representative
888-206-6578

Let's get to work.

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401 Congress Avenue, Suite 1850 Austin, Texas 78701

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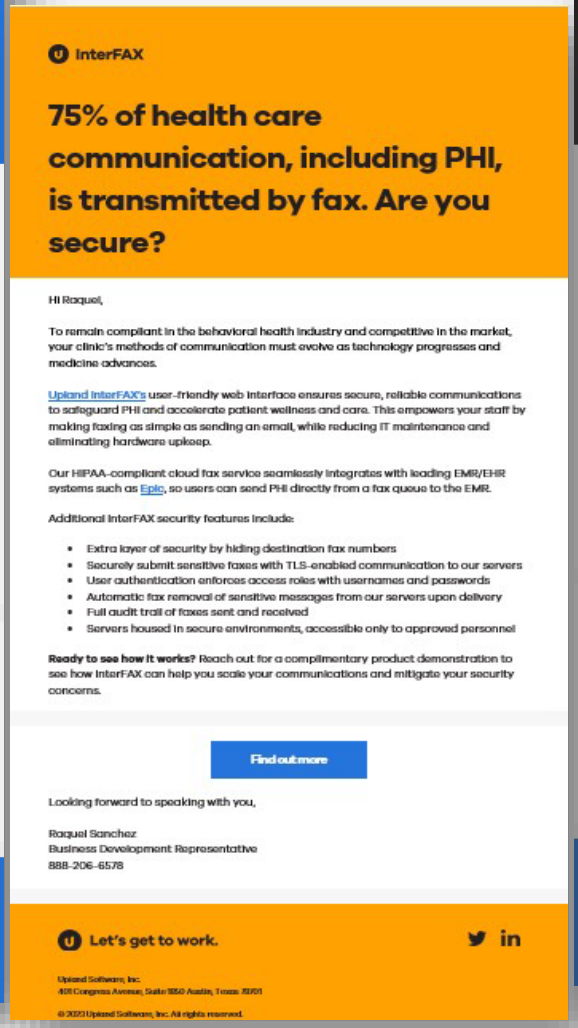

InterFAX

75% of health care communication, including PHI, is transmitted by fax. Are you secure?

Hi Raquel,

To remain compliant in the behavioral health industry and competitive in the market, your clinic's methods of communication must evolve as technology progresses and medicine advances.

Upland InterFAX's user-friendly web interface ensures secure, reliable communications to safeguard PHI and accelerate patient wellness and care. This empowers your staff by making faxing as simple as sending an email, while reducing IT maintenance and eliminating hardware upkeep.

Our HIPAA-compliant cloud fax service seamlessly integrates with leading EMR/EHR systems such as Epic, so users can send PHI directly from a fax queue to the EMR.

Additional InterFAX security features include:

- Extra layer of security by hiding destination fax numbers
- Securely submit sensitive faxes with TLS-enabled communication to our servers
- User authentication enforces access roles with usernames and passwords
- Automatic fax removal of sensitive messages from our servers upon delivery
- Full audit trail of faxes sent and received
- Servers housed in secure environments, accessible only to approved personnel

Ready to see how it works? Reach out for a complimentary product demonstration to see how InterFAX can help you scale your communications and mitigate your security concerns.

Find out more

Looking forward to speaking with you,

Raquel Sanchez
Business Development Representative
888-206-6578

Let's get to work.

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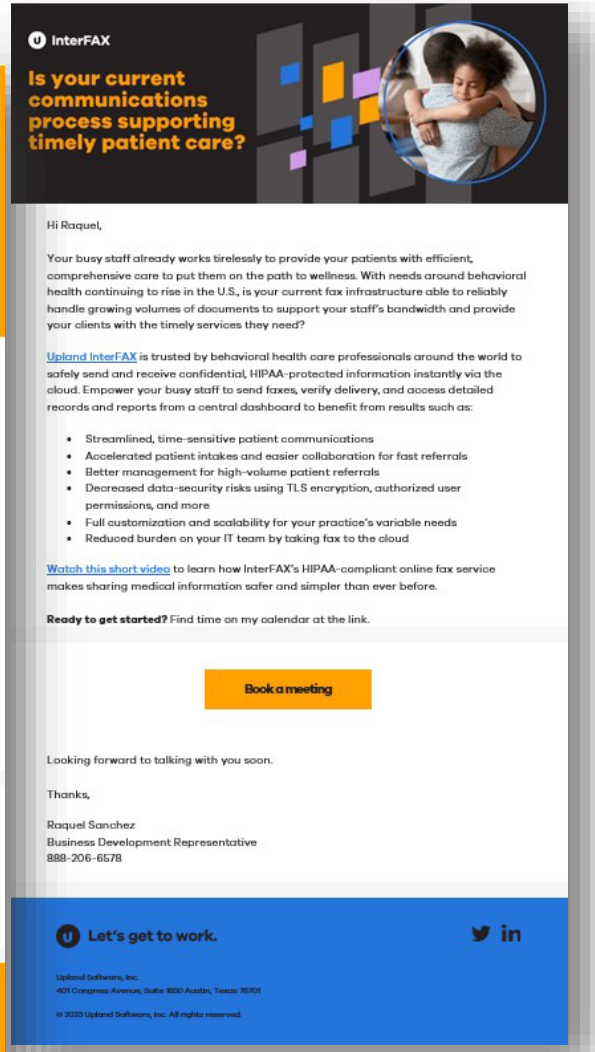

InterFAX

Is your current communications process supporting timely patient care?

Hi Raquel,

Your busy staff already works tirelessly to provide your patients with efficient, comprehensive care to put them on the path to wellness. With needs around behavioral health continuing to rise in the U.S., is your current fax infrastructure able to reliably handle growing volumes of documents to support your staff's bandwidth and provide your clients with the timely services they need?

Upland InterFAX is trusted by behavioral health care professionals around the world to safely send and receive confidential, HIPAA-protected information instantly via the cloud. Empower your busy staff to send faxes, verify delivery, and access detailed records and reports from a central dashboard to benefit from results such as:

- Streamlined, time-sensitive patient communications
- Accelerated patient intakes and easier collaboration for fast referrals
- Better management for high-volume patient referrals
- Decreased data-security risks using TLS encryption, authorized user permissions, and more
- Full customization and scalability for your practice's variable needs
- Reduced burden on your IT team by taking fax to the cloud

Watch this short video to learn how InterFAX's HIPAA-compliant online fax service makes sharing medical information safer and simpler than ever before.

Ready to get started? Find time on my calendar at the link.

Book a meeting

Looking forward to talking with you soon.

Thanks,

Raquel Sanchez
Business Development Representative
888-206-6578

Let's get to work.

Upland Software, Inc.
401 Congress Avenue, Suite 1850 Austin, Texas 78701

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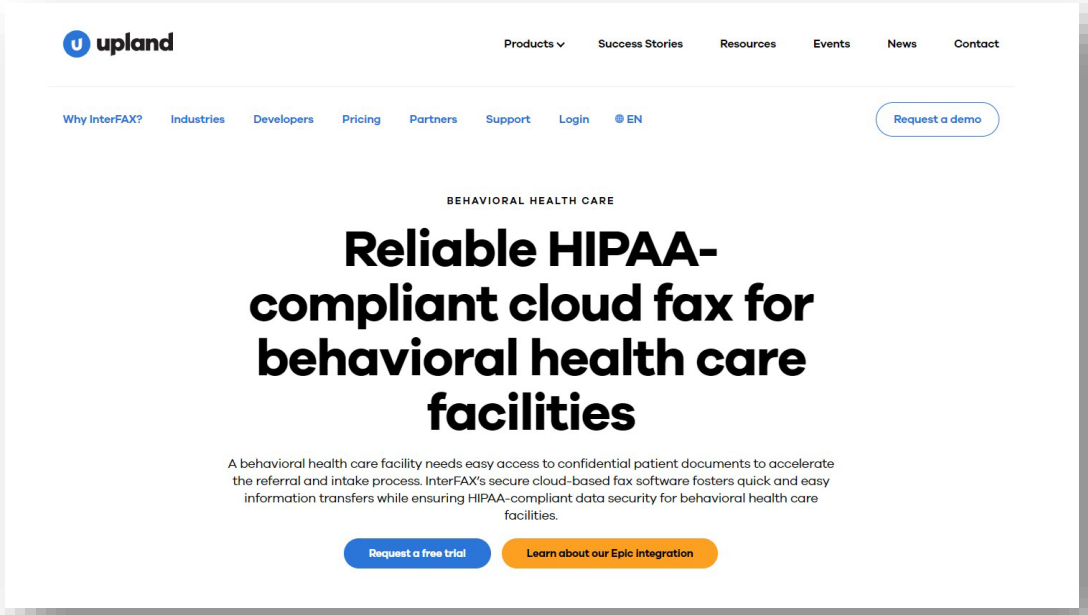
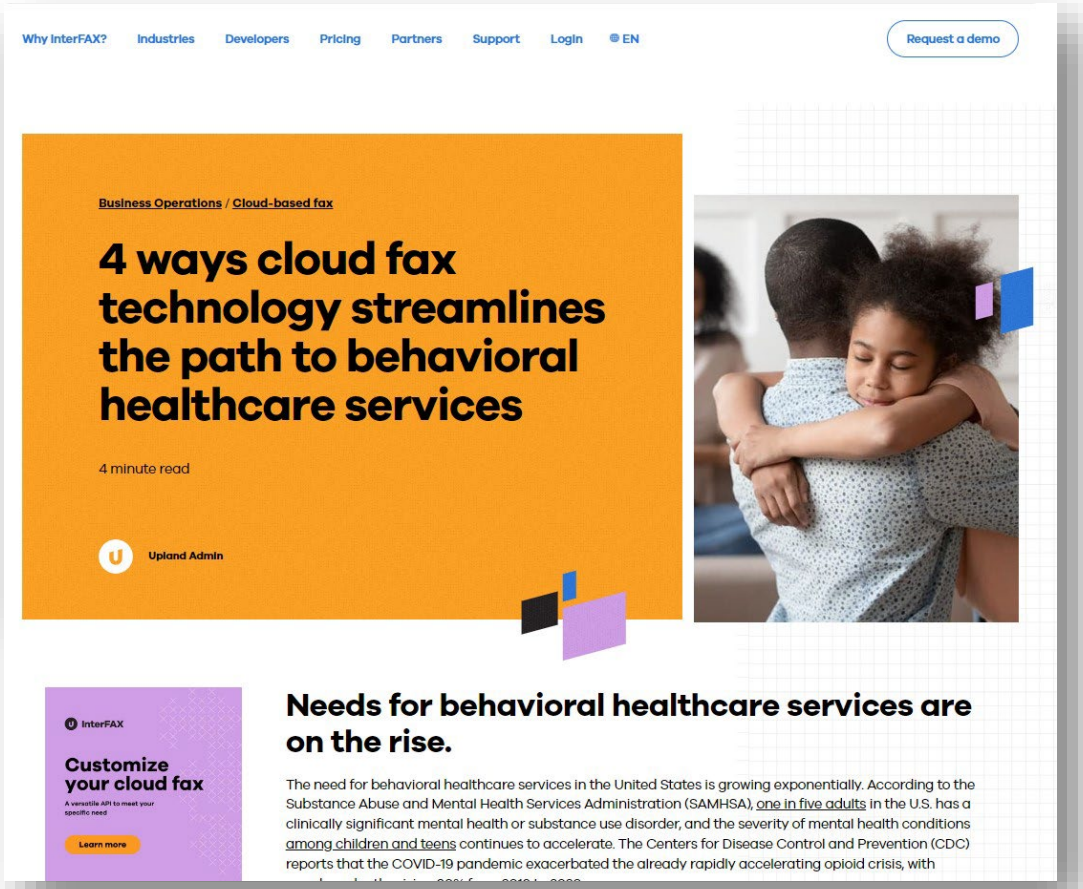
Behavioral Health Campaign: Web Content

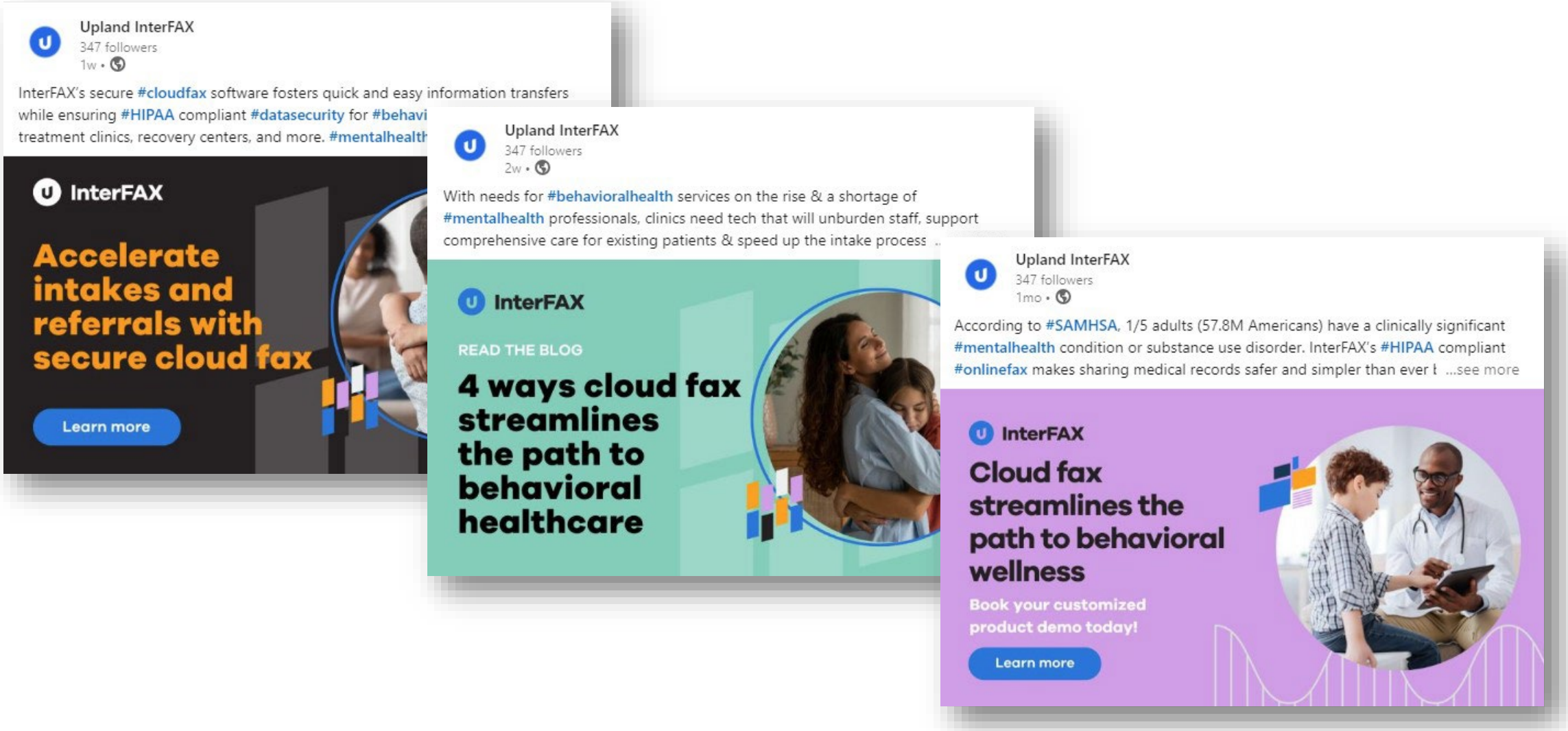
Designated Industry Page



Designated Blog

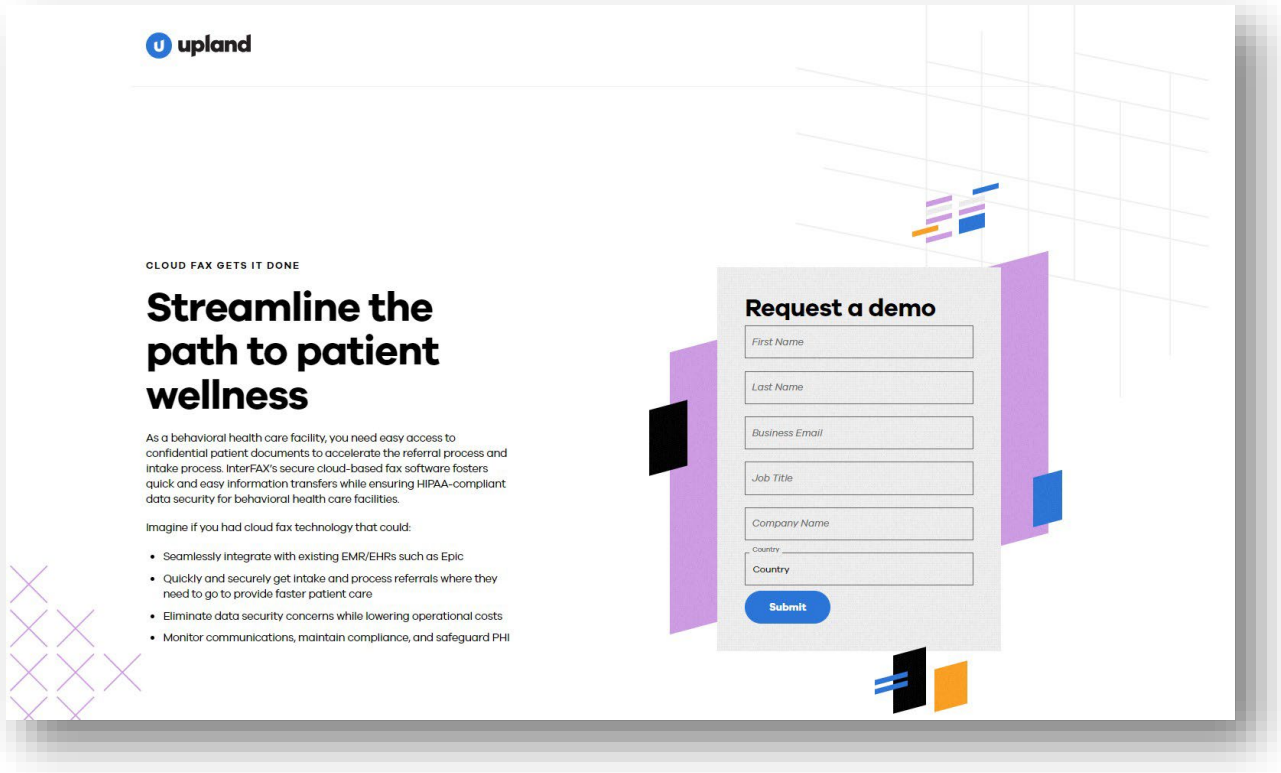


Behavioral Health Campaign: Social media

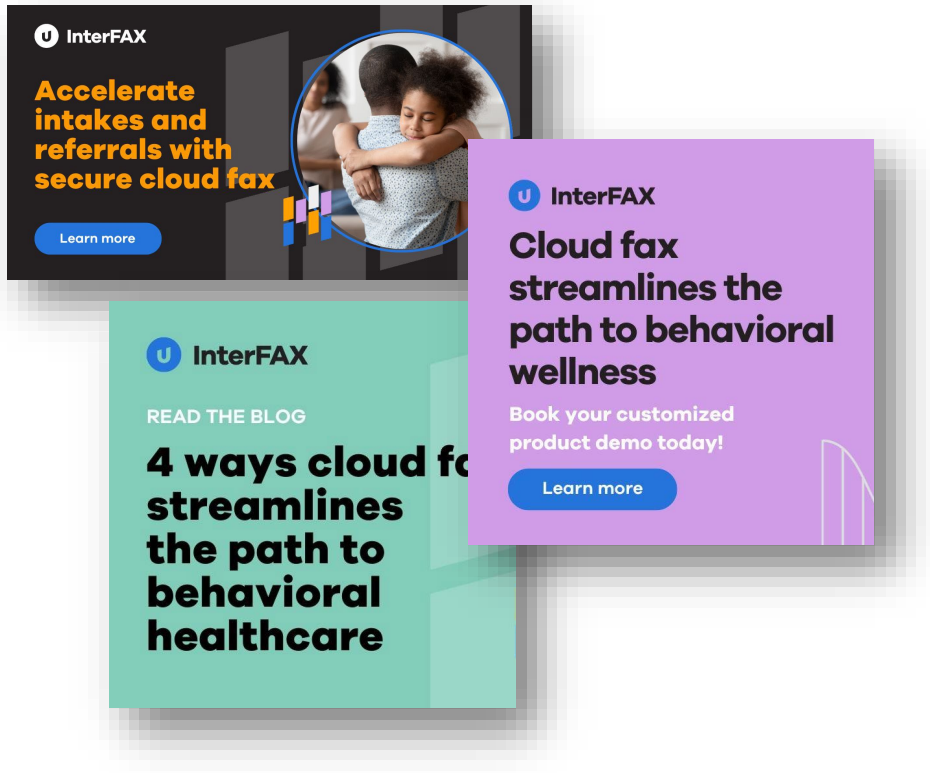


Behavioral Health Campaign: Paid media

PPC Landing page



Google/LinkedIn Ads



Let your success stories speak for themselves.

Case Study: TXMultilisting

TXMultilisting's partnership with Upland InterFAX is saving lives by making the organ transplant waiting list system in the US more accessible.

What others are saying

"Because of your website, I managed to receive a kidney transplant in less than 90 days of becoming active on the list. I had been enduring dialysis waiting for a kidney for about a couple of years."

Zeb, IL

"I just received a transplant from Johns Hopkins three weeks ago. I owe you a great deal. If not for your information, I would have stuck to the three NYC area hospitals (8 to 13-year waits). Instead, I searched for reasonable OPO's and I ended up with the most incredible world class hospital. Unbelievable experience. Thank you - profusely - for your amazing work, research, website, and our communications. You've done an amazing service."

Ellis, NY

Featured in:

Forbes

CBS

Did you know?

Less than 5% of website visitors fill out forms.

Of those form-fills, only 25% become an MQL (Marketing Qualified Lead).

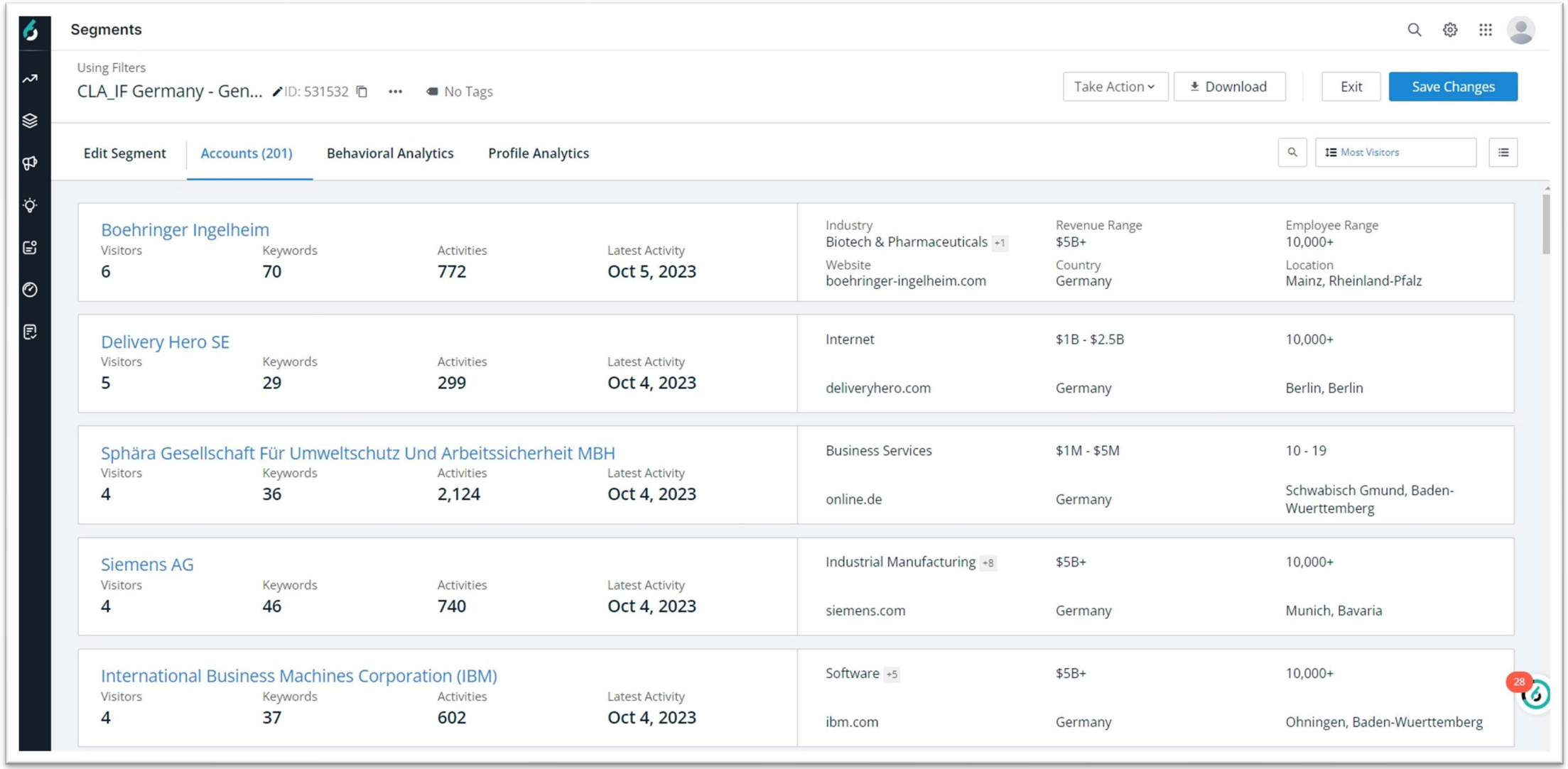
70% of the buyer's journey happens *before* they raise a hand.

Buyer Intent Data

- Intent data can reveal which companies are ready to buy and what's driving their interest.
- Intent data shows
  - Which accounts may be interested in their products or services
  - How likely they are to become a customer
  - When they're most likely to make that decision

Buyer Intent Data

- Shows companies that are researching identified keywords (secure fax, online fax, etc.)
- Shows when they visit our website and which pages they click on
- Shows company name, industry, company size, and annual revenue
- Allows us to track activity
- Enables us to personalize marketing efforts and maximize timing
- We even have the ability to run LinkedIn dynamic advertising campaigns from within 6sense to target these potential buyers



6sense Report: Germany

Peer review websites

- According to the 2021 G2 Software Buyer Behavior Report, 86% of software buyers across segments use peer review websites when buying software.
- While we have a presence on multiple peer review websites, G2 is the largest and most trusted software marketplace.
- You and your customers can help Upland Interfax become one of the best reviewed, top rated brands for cloud fax.
- It's a simple as filling out a review - and everyone who leaves a review will be eligible to claim a giftcard worth $50.

We are here to help.

- What do you need from our marketing team?
- What industries can we help you reach?
- What tools can we help you utilize?

Product Updates

Fani Antora Dima
Director of Product

Product management: Our philosophy

Deliver customer value

We are the voice of the customer!

Focus on delivering high-impact improvements driven by real-life needs.

Drive innovation

Leverage and adopt technological advancements.

Keep a pulse on the market and its evolution.

Invest on foundation

Deliver products that are solid, reliable, secure, scalable and up-to-date.

Content Lifecycle Automation (CLA)

Simplifying everyday work by transforming content-centric processes to make business more efficient.

AccuRoute

Secure document capture, fax, and delivery for the enterprise

BA Insight

AI-driven enterprise search that delivers relevant, personalized, and actionable results

FileBound

Document management system for reliable, user-friendly content workflow

Intelligent Capture

Document capture software with cloud-based routing and fax

InterFAX

Secure cloud-based fax service with enterprise-grade API

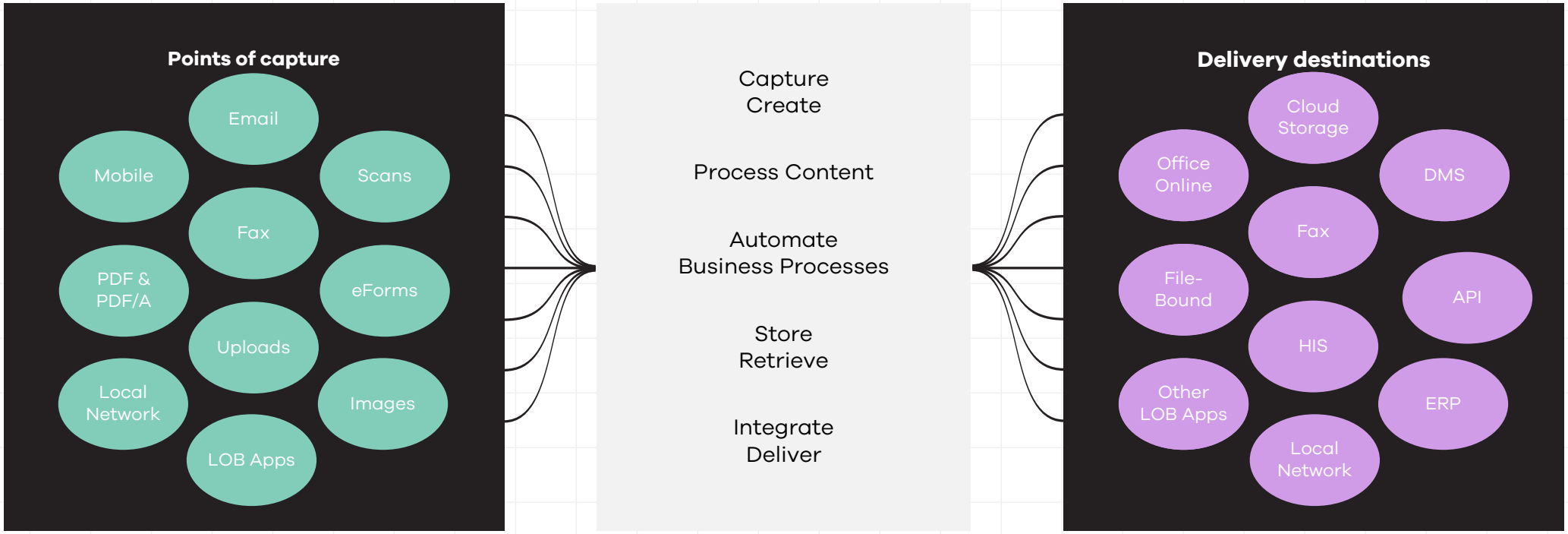
Objectif Lune

Content creation, transformation, and process automation with multi-channel delivery

Qvidian

RFP response and proposal management software to win new business faster

Secure Content Lifecycle Automation



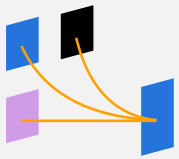
Fax: Extend the core business value in more use cases

Multichannel communications: Strengthen value proposition of fax as part of a broader secure and reliable outbound communications strategy.

Workflow integrations: Enable back-office systems (ERP, DMS, EHR/EMR) with the efficiencies of cloud fax and inbound capture.

Capture, workflow and enterprise content management: Analytics, Machine Learning, Artificial Intelligence, advanced content recognition enable intelligent capture, sorting and distribution of fax content to where it needs to be routed (databases, systems of record etc.).

Content Lifecycle Automation – Fulfill enterprise business requirements end-to-end

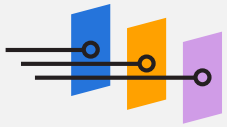


Capture
Create

Process
Content

Automate
Business Processes

Store
Retrieve



Integrate
Deliver

AccuRoute
On-premise capture and fax

Upland Intelligent Capture
Cloud-based capture

FileBound

FileBound
Business process (workflow) automation

InterFAX
Cloud fax

AccuRoute

AccuRoute CloudFAX

Upland Intelligent Capture

Objectif Lune
Content creation, transformation and workflow automation

Objectif Lune
Multichannel output

Qvidian
Proposal management

BA Insight
Enterprise search

Digital Files
Electronic Forms
Paper Documents
Multi-Channel Composition

Convert
Classify
Extract Data
Index
Build Files

Review
Validate
Approve
eSignatures

Local and Cloud
Secure Storage
Search
Retrieve

Email and Fax
Content Repositories
Connectors and APIs
Print

Cloud fax opportunities

Capture capabilities

Accurately identify, extract and route.

Enable business process automation

Improve accuracy and reduce cycle execution times and the requirements for manual input.

Simplify integrations

Grow user base and volume.

Cloud-first strategy

Central administration, reporting/logging/auditing, compliance, privacy and security.

InterFAX uniquely positioned to leverage market opportunities

InterFAX

Product Roadmap

Now

Consolidation of User Interfaces
Consolidating Secure Site & CP into UI, discontinuing support for old sites entirely. All Brands/Partners being moved carefully and individually.

SSO & API Authentication*
Available within UI, we are continuing implementation of SSO via OpenID Connect and SAML, as well as implementing API authentication.

Cover Page Functionality*
Further updates to allow for the usage of cover pages from a variety of sources, such as email and via API.

Pointing to an external URL
Added support for submitting a fax via REST API pointing to an external PDF URL file in addition to HTML files.

UI PCI Certification
The UI site is in this year's PCI certification scope, migration of PCI clients to start soon after the certification is complete (expected January 2024)

Next

UI Enhancements*
Improvements to the UI widgets, as well as further refinements to improve functionality and ease of use, based on testing and feedback from users.

Operational Improvements
Improvements to our billing systems and fraud detection processes, the completion of the Admin Supportability project, with three rounds of four releases having been completed already.

Large File Size Support
Available over SMTP, we will continue to expand support for large file sizes within the InterFAX services.

Technology Upgrades
Upgrades to our backend capabilities, providing increased scalability and security.

Mobile Web Views*
Mobile optimization for the InterFAX UI site.

Expanded Use of Callbacks
Utilizing and expanding upon callbacks to send inbound images and metadata, allowing us to target eFax clients who use the same functionality.

Payment Gateway Review/Providers
Review and updates to our payment processing abilities and options, in ongoing discussions with payment providers.

Later

Intelligent Capture Integration
Integrating Intelligent Capture into the InterFAX service.

Developer Documentation
Updates to our API and SDK documentation.

Customer Reporting*
Improvements to our reporting and auto-reporting capabilities, to better support customers and provide the information needed, to streamline business processes.

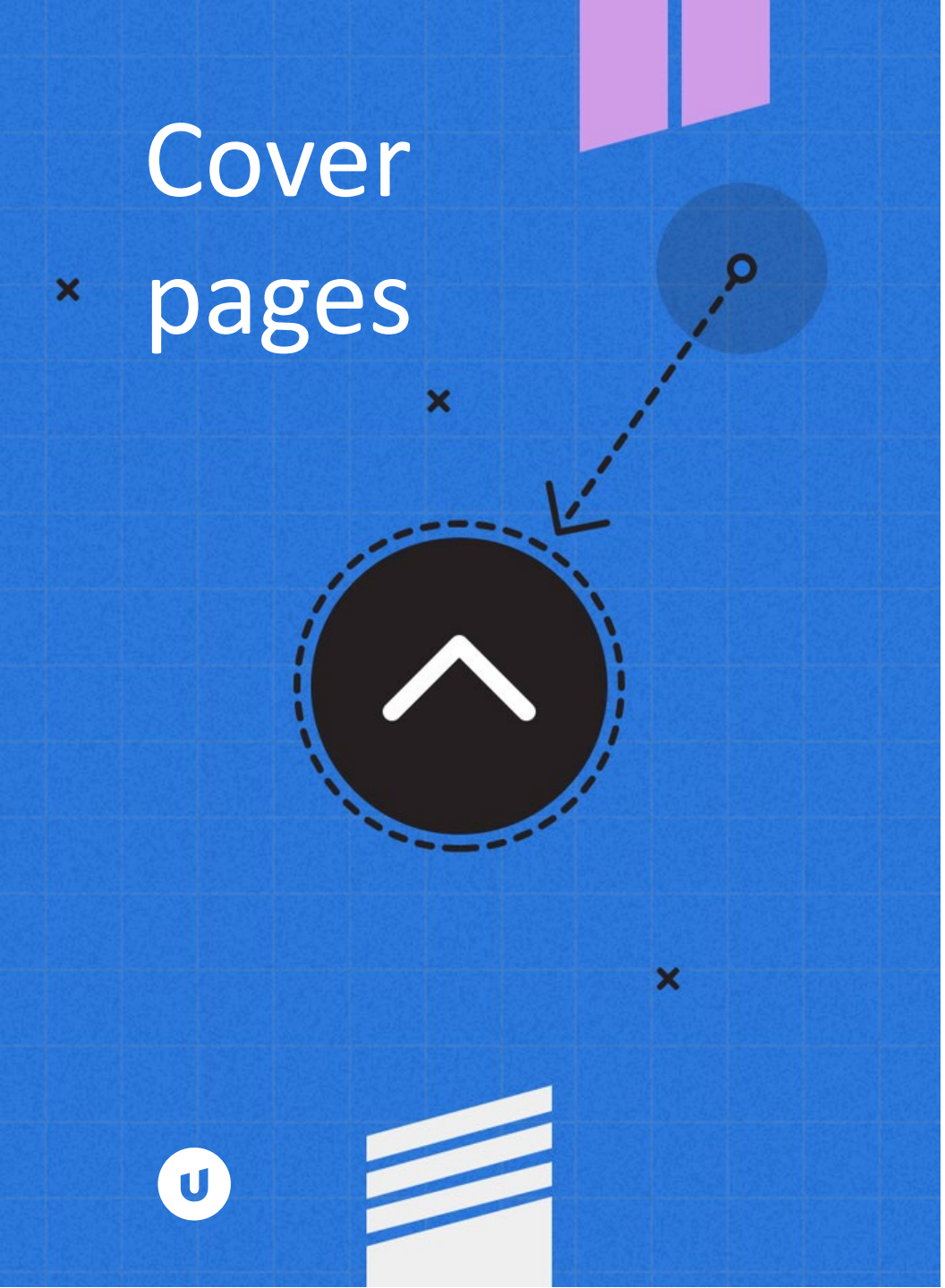
Inbound Call Blocking / Filtering
The ability to block and/or filter inbound transactions depending on requirements.

The information contained herein is intended to outline the general product direction and should not be relied upon in making purchasing decisions. The content is for informational purposes only and may not be incorporated into any contract. The information presented is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. Any reference to the development, release and timing of any features or functionality described for these products remains at Upland's sole discretion. Product capabilities, timeframes, and features are subject to change and should not be viewed as commitments.

Single Sign-On!

We are very excited to announce that InterFAX now supports Single Sign-On (SSO) through **SAML and Open ID Connect**. Save time provisioning users, while also providing **Multi-Factor Authentication (MFA)** capabilities that are offered through these services.

Cover pages



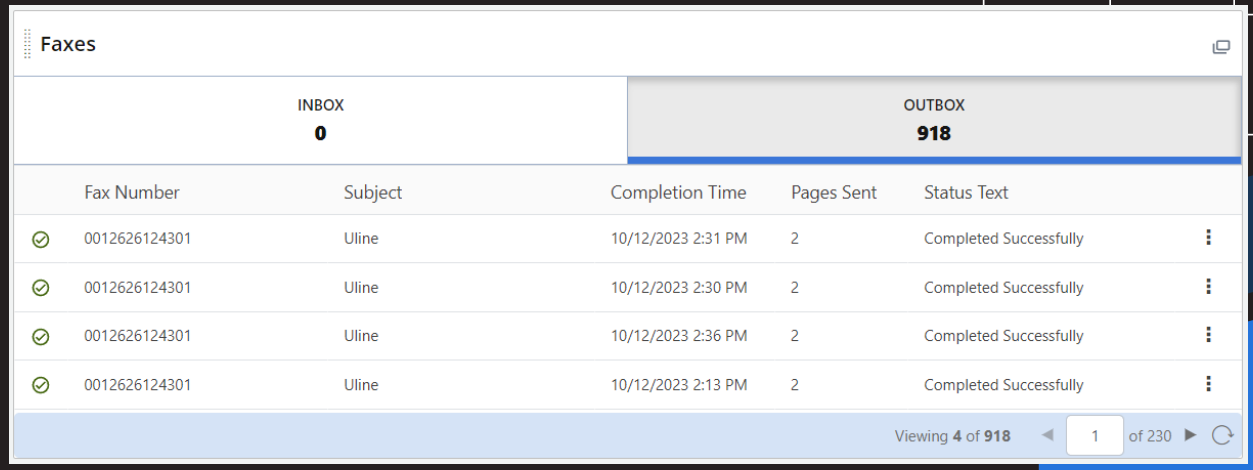
Now available through **Email and the API!**

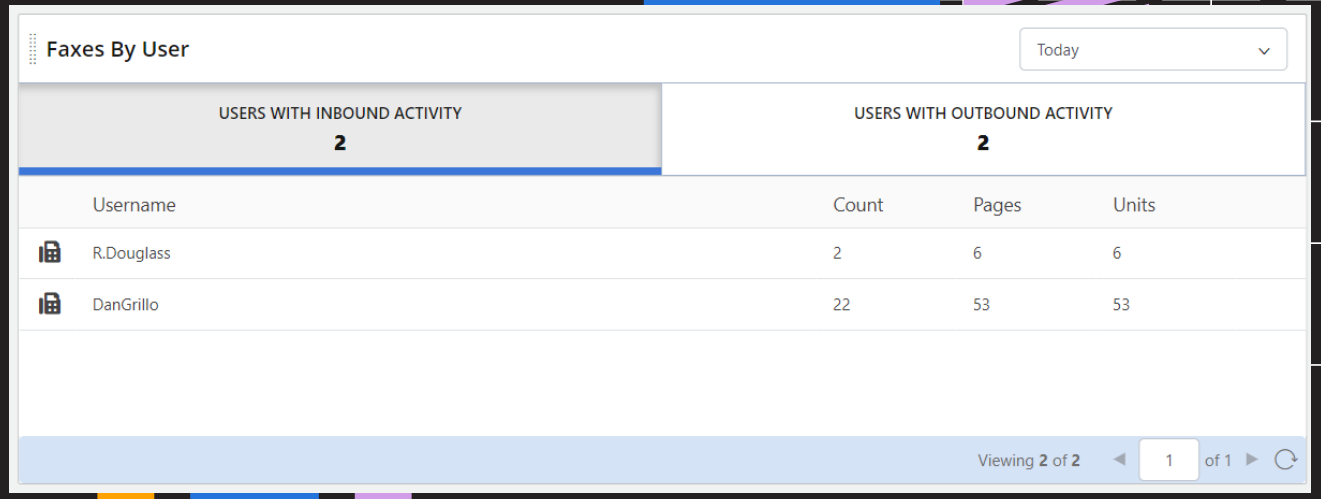
- Fit regulatory requirements
- Competitive advantage
- Customize leading pages
- Insert variables like Date, Time, Recipient and even custom fields
- Even add images and tables!

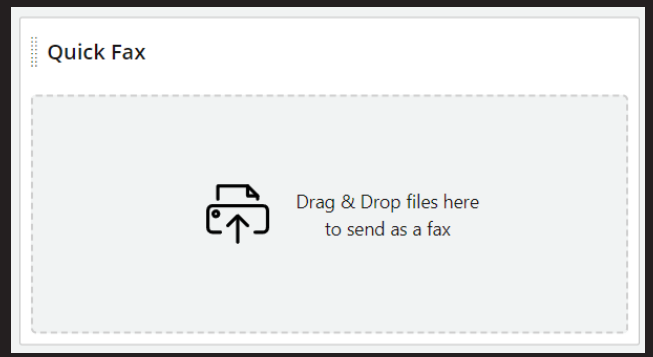
Widgets!

We are going to make more.

Looking to introduce graphs, traffic/unit counters, and new workflow related uses.







Customer reporting

Customizable reports where you have access

- Build your own reports
- No more support requests
- Customize desired fields
- Create date parameters
- Set up recurring outputs

InterFAX for mobile

(not actual screenshots)

Partner Presentations

That's you!

See you at 6:30pm in the lobby to leave for dinner!

Day 2 Agenda

Welcome Back
Shawn Freligh

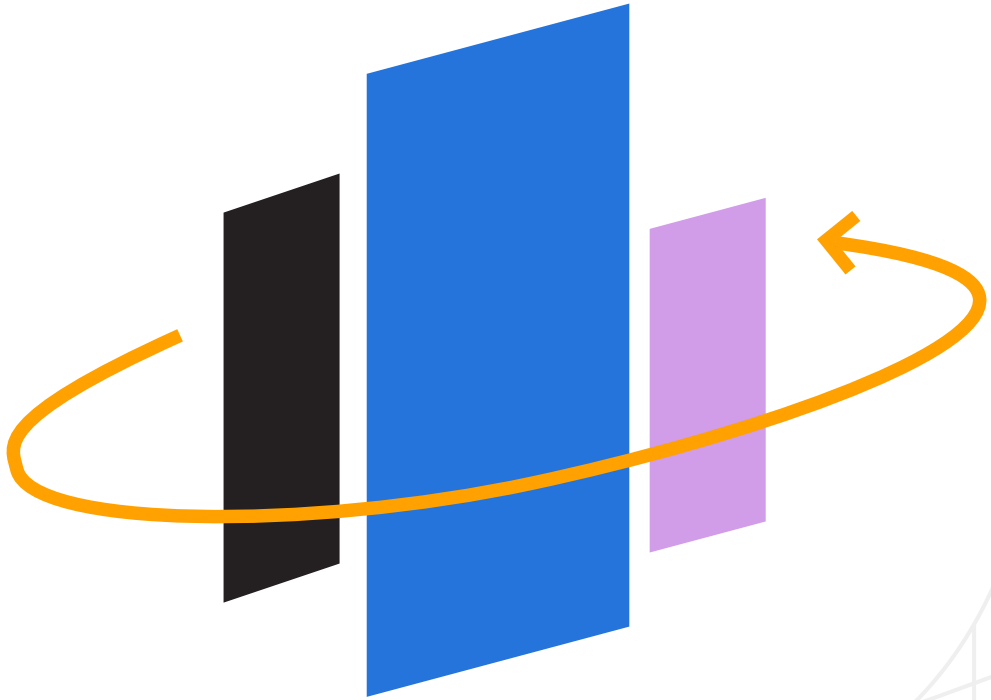
Partner Support & Operations
Ramona Jabali

Q&A

Individual Partner + InterFAX Meetings

Closing Remarks
Shawn Freligh

Lunch



Welcome!

Shawn Freligh
SVP and GM

Let’s review and see what’s new.

Ramona Jabali
Director of Operations

Katie Nicolo
Sr. Manager
Customers Support

Partner Support and Operations

Partner Support and Operations

- Overview of previous partners' open issues
- What's new with the InterFAX Support teams
- Support tickets overview

InterFAX Traffic

- InterFAX traffic
- Inbound success rates
- Outbound success rates per top destinations

InterFAX Operations Overview

- Recent technical issues
- InterFAX improvements and changes

InterFAX Partners Concerns From Previous VPC

UI Site

- ❑ The new UI has been released officially in February 2023 to all our customers.
  New release on October 22nd.
- ❑ Updating new CC / purchasing of new services in case of a debt & evaluation accounts converted to pre-paid when they try to purchase a service.
- ❑ Invoices issued for credit accounts automatically when adding a service instead at the end of month.
- ❑ "Received time" on exported csv/xml file of Inbound Faxes doesn't show JST. By design, data in export files is based on the time zone supplied by the browser.
- ❑ Translations in Japanese, Hebrew.

Faster support and improve handling of urgent tickets (Ongoing)

- ❑ Cloud and Service Management became One Team (Team also expanded)
- ❑ Cross training allocation of resources – Buddy System
- ❑ We have in place the OLA (Operational Level Agreements) for the internal teams, and a monthly meeting to review the outstanding issues and delays.
- ❑ New employees that are still learning – Kaleb was promoted as a CSM, and we have two new support representatives.
- ❑ In the process of implementing a triage process for the Support Team, to help solving the issues quicker. Urgent issues will be handled by the 2nd tier.
- ❑ For easier reporting and tracking of specific organization tickets, we are in the process of implementing Salesforce integration with Zendesk.

InterFAX Partners Concerns

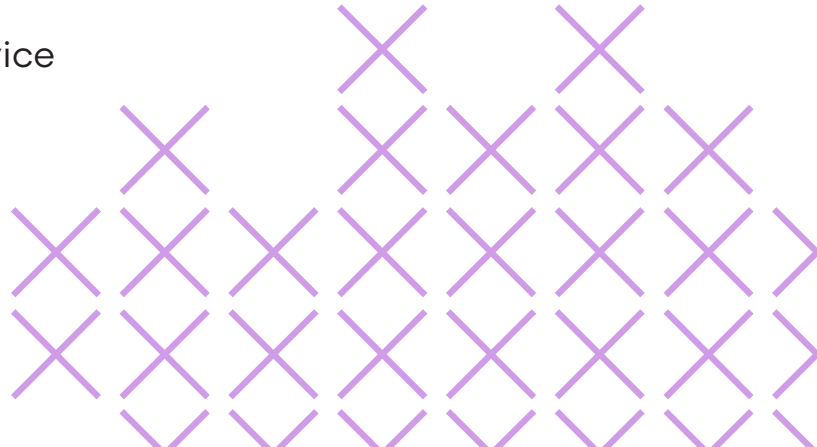
From Previous VPC

Improving the billing process

- ❑ Issuing monthly invoices also for PP accounts in addition to credit accounts
- ❑ Add control in Admin to specify which PP invoices to be issued in .eml format
- ❑ Add controls so customers will not be invoiced twice in case there is a human mistake
- ❑ Adding automation in creating the monthly CDRs
- ❑ Adding translation of invoices when downloading from Admin site

Fixing the open issues in the new rendering engine

- ❑ We are focusing on specific files related issues. Some fixes in the HTML rendering released this year
- ❑ We continue to work on the new rendering PDF engine with the vendor
- ❑ We are looking at alternative vendors to help improve quality of our rendering service



What's new with the InterFAX Support Team

Level 1 Support: Partners

Level 2 Support: Partners Support Team

Katie Nicolo
Sr. Manager
Customer Support

Micah Hettmansperger
Technical Lead

Eoin Sheehan

Steve Robinson

Daniel Delaney

John Brogan

Connor Wheelock

What's new with the InterFAX Support Team

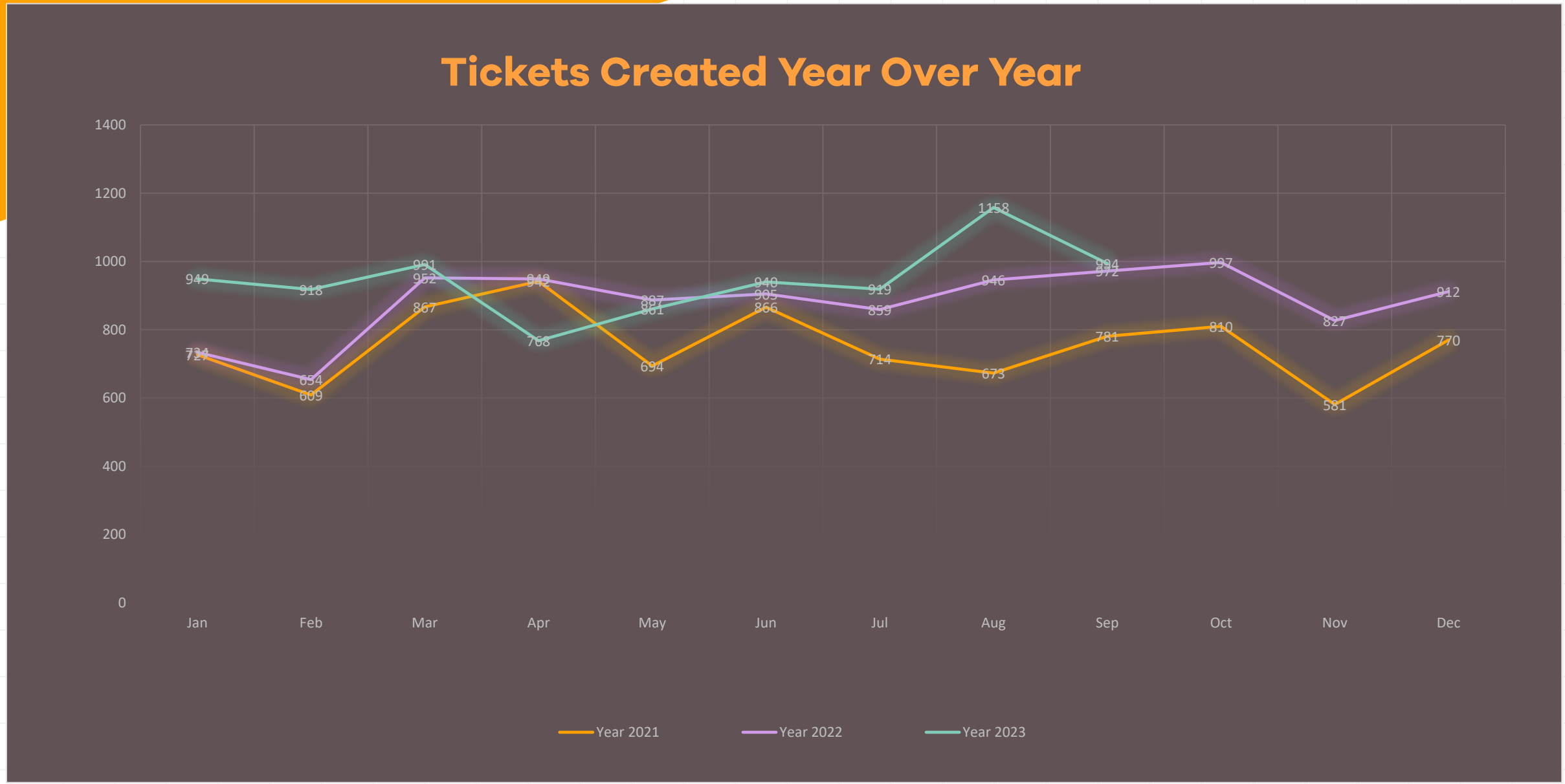
Level 2 Support: Partners Support Team

Uma Nanthini

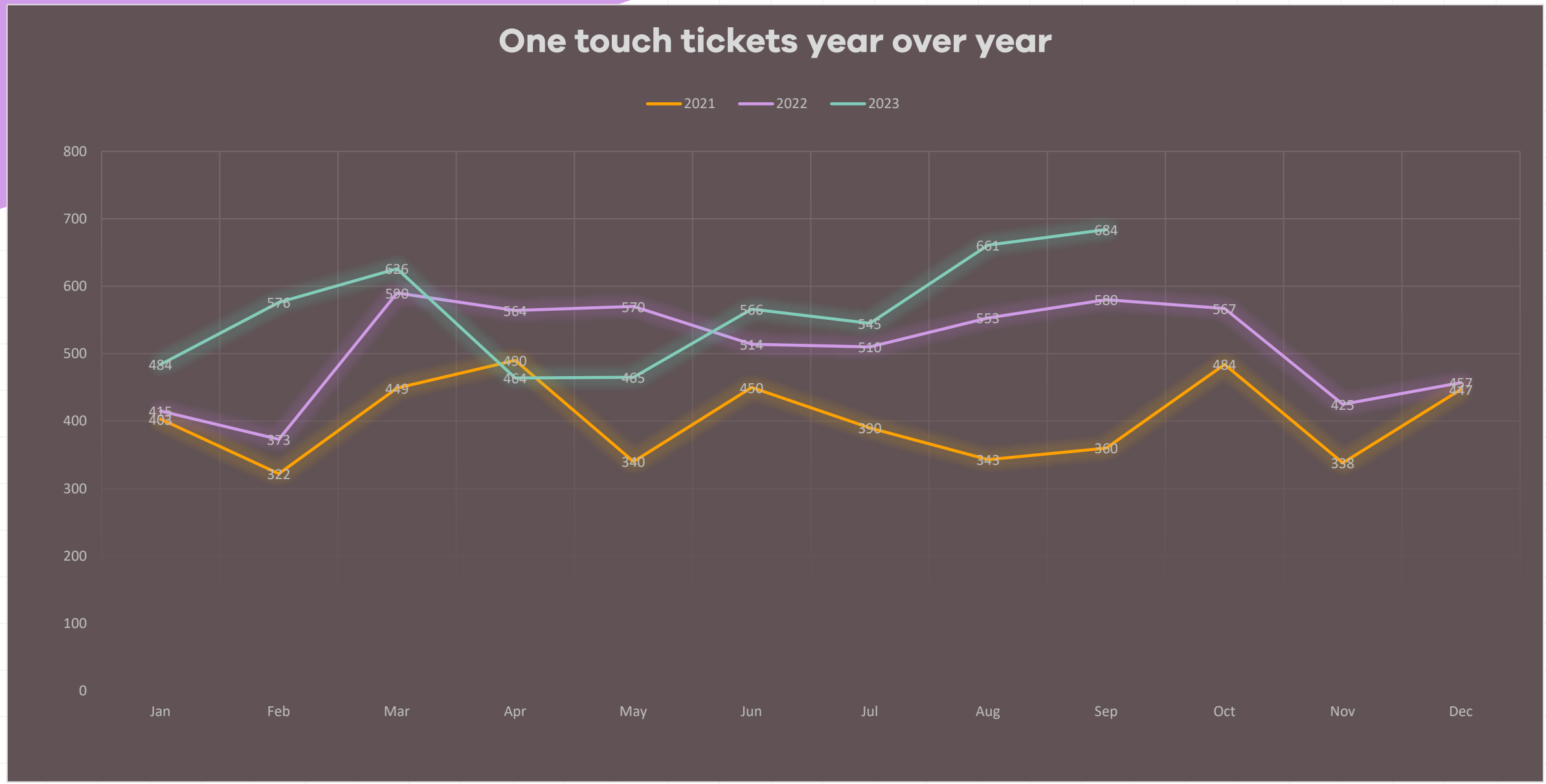
Maizatul Akmar

Support Escalations: Cloud Operations Team

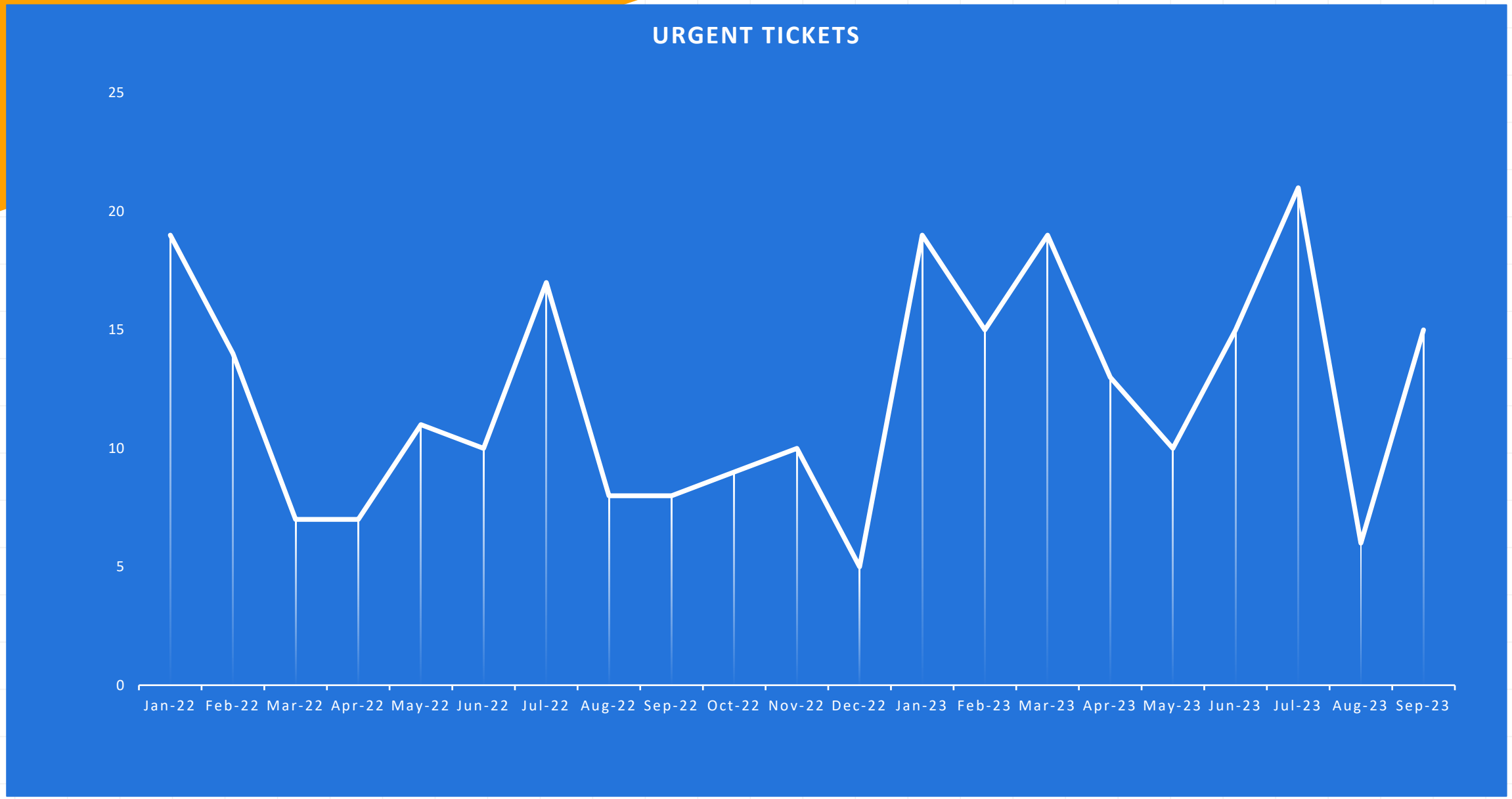
Support Tickets Overview



Support Tickets Overview

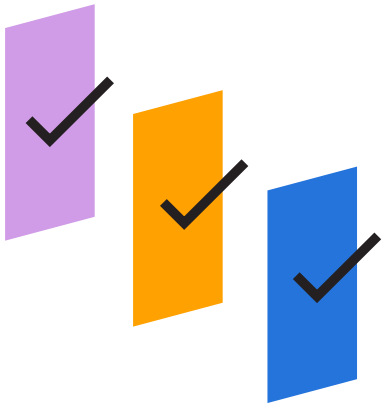


Urgent Tickets Opened 2023



Support Tickets Overview

Satisfaction Score



	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23
Satisfaction Response Rate - Satisfied	100%	100%	100%	90%	95%	100%	100%	100%	100%	100%	100%	100%
% Satisfaction Surveys - Responded	2.64%	2.91%	4.04%	2.58%	4.60%	3.99%	1.29%	2.18%	1.58%	2.85%	2.13%	1.76%

Support Tickets Overview

Efficiency

	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23
Average first reply for all tickets opened during the month (hours)	2.8	2.2	2.3	3	2.9	3.6	4	3.4	3.8	3.7	4.1	3.1
Resolution time for tickets created in the last 6 months (average days)	7.3	8.6	9.4	8	7.2	8.3	9.1	9	9	9.8	9	8.7

Support Tickets Overview

Support Surveys

Ticket 1284836, 17/05/2023: "Daniel was awesome! I got the answers I needed, and the client was very pleased with his analysis of the issue."

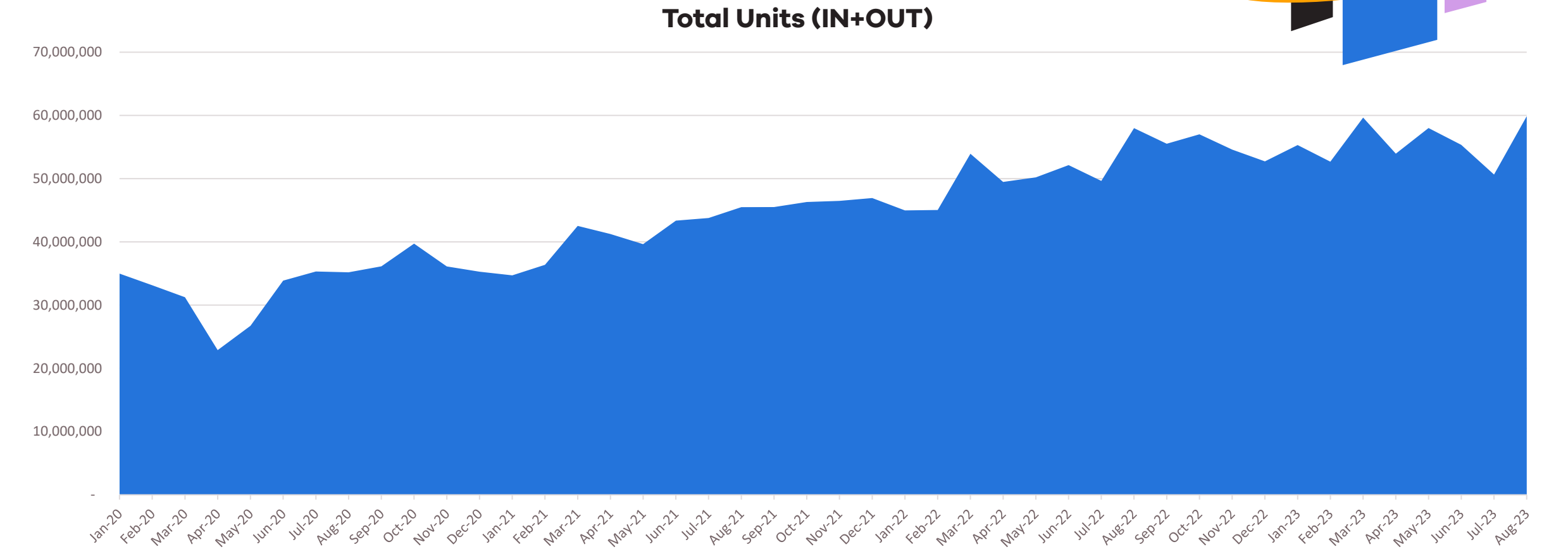
Ticket 1347850, 16/08/2023: *"In the many years I have been in the technology business I never had a support request call go so smoothly. Micah is a smart and professional individual who knows the product and how to help diagnose issues. After only a couple of minutes on the phone our problem was determined and corrected. I only wish every company we deal with had a Micah. Thanks Again."*

Ticket 1277312, 03/05/2023: *"Quick response from Eoin Sheehan thanks once again for the support."*

Ticket 1246765, 11/04/2023: *"Excellent Support. John Brogan was very helpful in resolving my issue. Thanks...PS - Love the new interface."*

Ticket 1356196, 29/08/2023: *"Steve was brilliant to deal with, actioned my query promptly and provided great customer service while doing so! An asset to your team and company."*

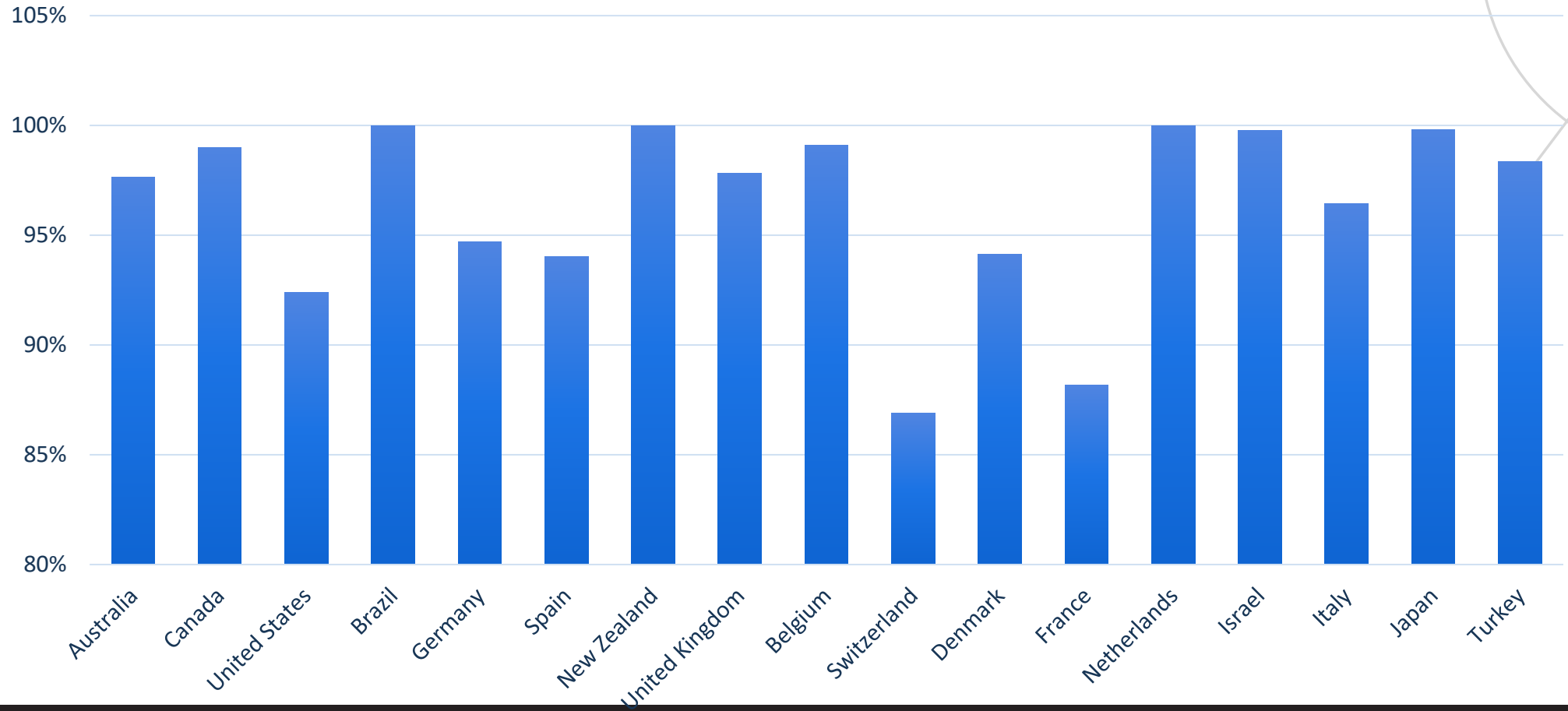
InterFAX Monthly Usage



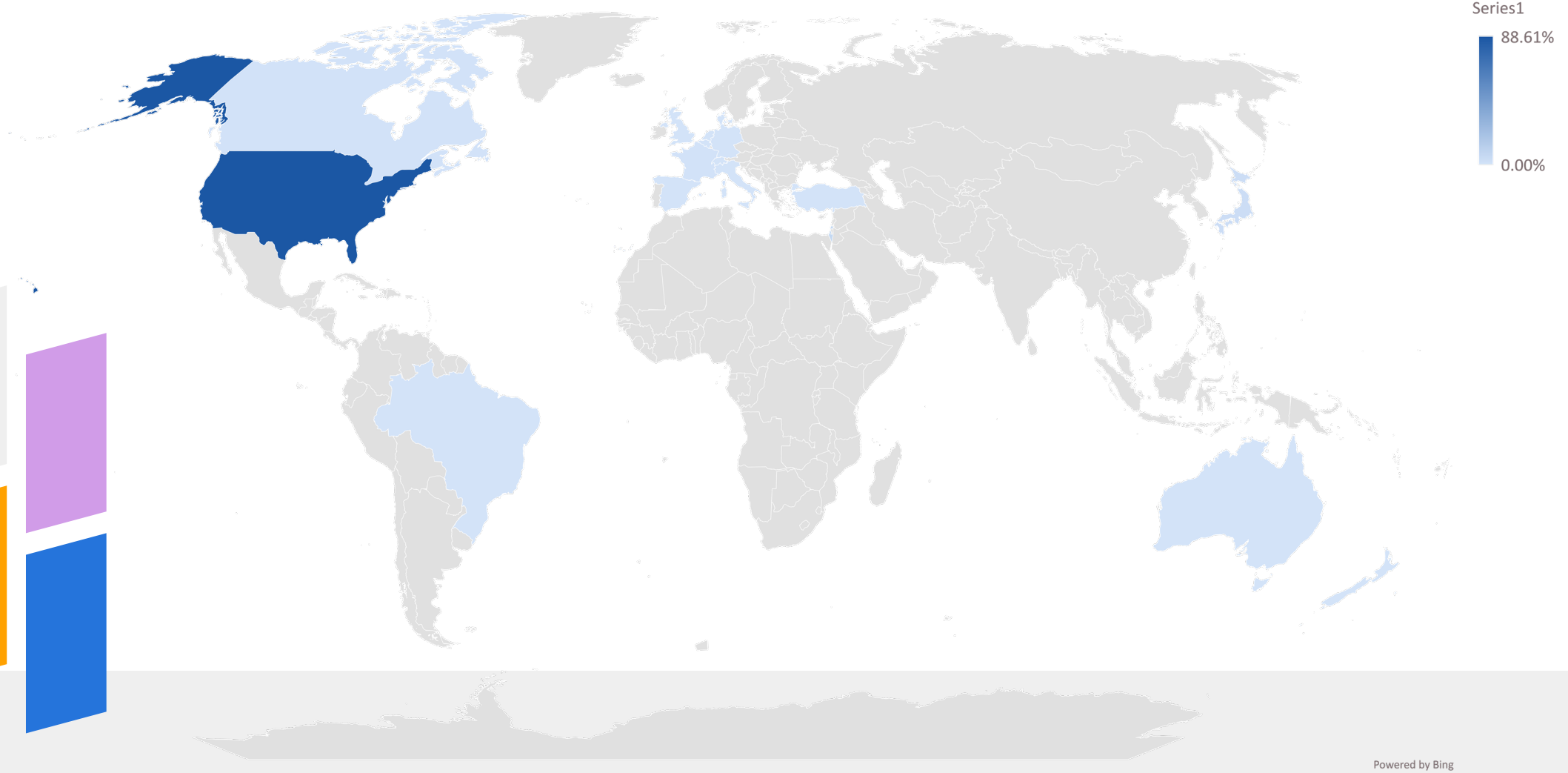
InterFAX Usage

Inbound Success Rate

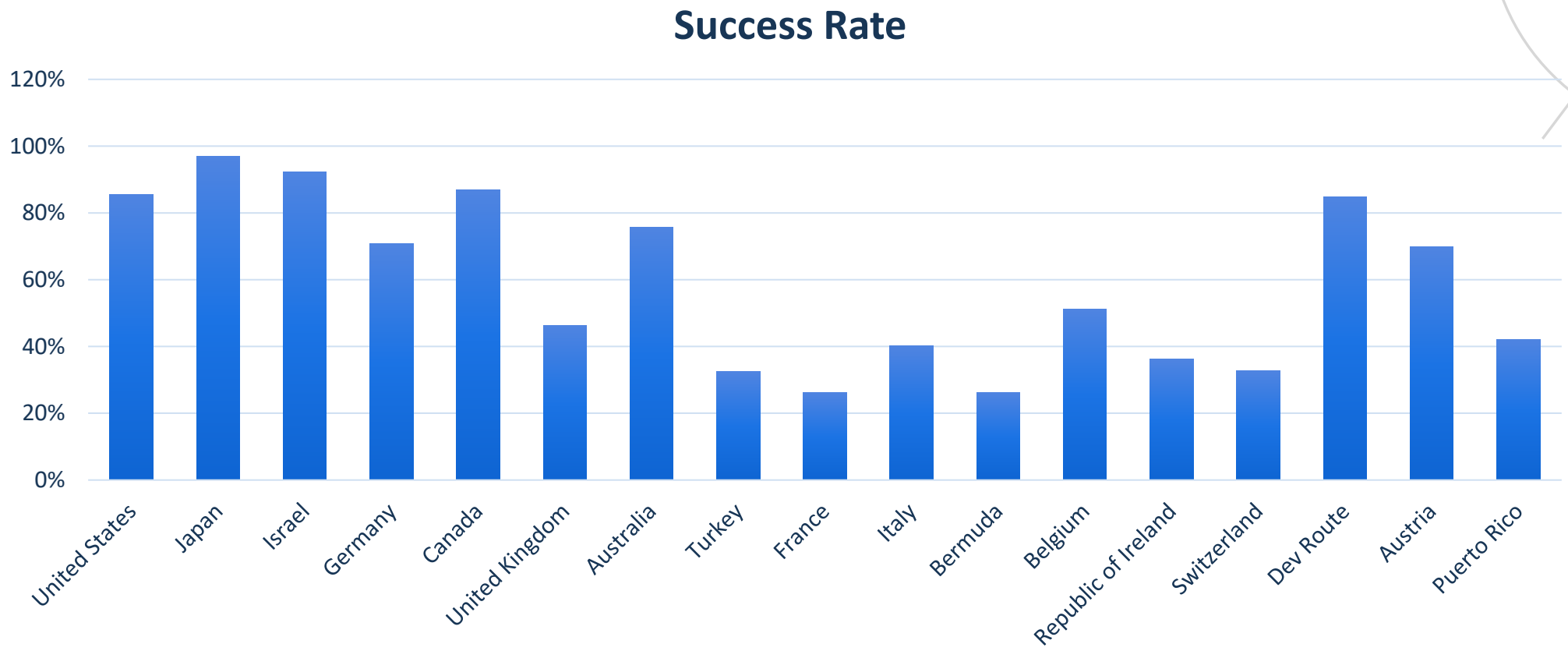
Overall Success Rate
94%



InterFAX Usage



InterFAX Usage



Overall Success Rate 85%

InterFAX Fax Facts

- Best month ever: Aug23, with 59.9 million units
- Best day ever: October 4, with 3.15 million units
- Jan-Sept 2023: 10% increase from same period of 2022
- 1.74 attempts per fax
- 48.5% success rate of outbound fax attempts (overall success rate is 85%)
- 44% of faxes succeeded on first attempt
- 3.43 pages per fax (3.16 pages in Sept22)

InterFAX Recent System Issues

InterFAX 99.95% service uptime

(https://interfaxstatus.site24x7signals.com/)

March – October 2023: No major system issues.

April 30th

Login.interfax.net - not available

Users experienced connectivity issuesd to the user site, login.interfax.net, as connections could not be validated. During ths time, a "branding" error was observed when a user attempted to login.

All other services, including faxing, use of API, email to fax, etc. Continued to work as expected during this time.

Root cause: A domain controller where user access / authentication to where the site is controlled experienced a failure.

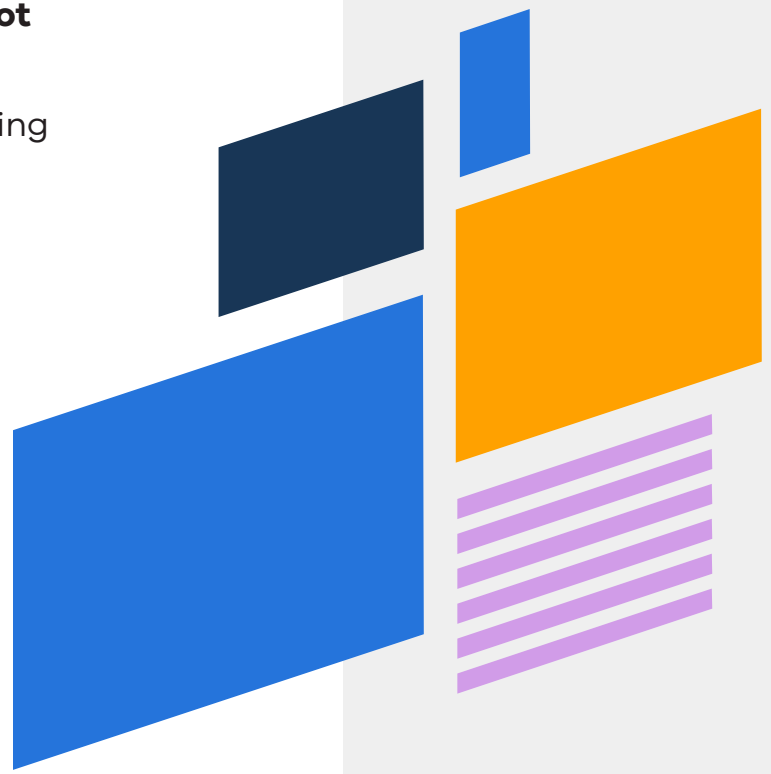
Remediation plan: The Cloud team worked with Microsoft to resolve the issue and implemented a backup plan for the primary DC.

July 27th

Login.interfax.net - unavailable for some users

It was discovered that all users experiencing the issue were using the same Internet Service Provider and that provider was degrading service through https://login.interfax.net. - AT&T.

Root cause: It was discovered that all users experiencing the issue were using the same Internet Service Provider and that provider was degrading service through https://login.interfax.net.



March – October 2023 System Changes

- October 15: Routine maintenance & updates required by AWS
- June – October: Firewall maintenance in Israel, Italy, Japan & Germany (Germany on the 16th of October)
- August 27: updating of encryption ciphers for PCI-DSS
- July 23: MySQL 8 upgrade phase 1 (on users' authentication database). Phase 2 to migrate the remaining customer instances to MySQL 8 to follow
- May 22: Urgent maintenance in UK by our hosting provider
- April 23: Routine maintenance and updates required by AWS
- Added +160 new fax channels from January 2023 until today (an increase of about 3%)
- Two new inbound international carrier: New numbers ordered & tested in Brazil, Peru, Argentina, Mexico, Poland, South Africa (in addition to Honk Kong, Singapore, New Zealand). We don't have numbers in the inventory, order by request due to regulations
- Migration from Verizon to Colt of German inbound numbers (ongoing)
- New fax servers in AWS for UK, Italy, Israel & Germany (ongoing)
- Upgrade of Windows servers to 2019/2022 (ongoing)
- In US, added support for T.38 fallback to G711 and G711 with fallback to T.38

Questions?

We've got answers.

Thank you!

Shawn Freligh
SVP and GM