

# Better Banking Documents, Faster

Automate the creation, delivery, and storage of routine bank documents, eliminating time-consuming, manual, and repetitive tasks to optimize your banking operations.

## Benefits of Document Automation in Banking



### 01. Improved Customer Experience

Provide your customers with smoother, faster, and more reliable interactions, from easy online applications to convenient digital signatures. Automate the generation of personalized loan terms and welcome letters for quick delivery and guaranteed accuracy.



### 02. Increased Productivity and Document Quality

Automate repetitive tasks to ensure accuracy, consistency, and compliance within your documents. Automated document workflows allow you to process documents faster, boosting productivity and reducing errors in routine documents which can lead to significant cost savings and improved profitability.



### 03. Streamlined and Efficient Operations

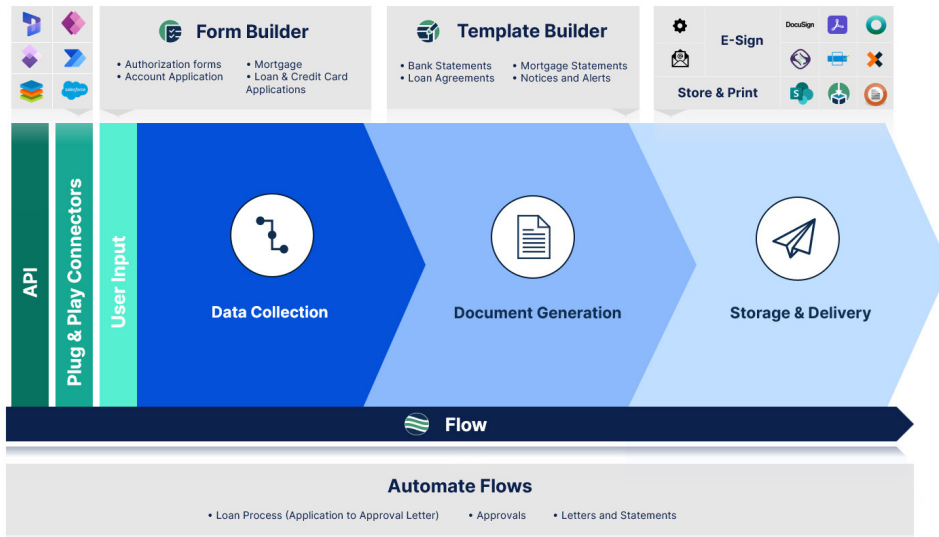
Streamline document generation and distribution processes with ease and speed. Eliminate manual steps such as data capture and document creation to save time and remain compliant. Easily automate the creation of highly personalized financial documents with dynamic features and business rules with minimal help from IT.



### 04. Enhanced Compliance and Adherence to Regulatory Standards

Ensure accuracy, consistency, and real-time updates, reducing the risk of errors and non-compliance. Create personal financial statement templates that combine both standard, regulatory wording, and variable data pulled from your connected financial services or CRM systems.





## Key Banking Document Automation Features



### 01. Digital Data Capture

Leverage AI-powered forms and flexible integrations to your financial, accounting, and CRM/ERP systems to access error-free data to create highly personalized forms. Combine data from multiple sources to create detailed and personalized bank statements with the click of a button.



### 02. Advanced Template Builder

The template builder with Microsoft Word add-in makes it easy to create data-driven financial statements. Add tables with detailed account activities such as deposits and withdrawals, etc. Include calculations based on deposited amounts displayed in a bar chart for a visual snapshot.



### 03. Fast Document Delivery

Integrate with leading electronic signature providers such as DocuSign, so you can quickly collect secure and legally binding signatures on time-sensitive financial documents, anytime, anywhere, and from any connected device, accelerating processes like account opening, and mortgage and loan applications.



### 04. Drag and Drop Workflows

Through a user-friendly visual interface, easily build and deploy document flows leveraging conditional logic. Build a workflow to automate new customer account document processes. Digitally collect data and automatically generate personalized welcome documents including terms and conditions.



### 05. Plug and Play Integrations

Integrate with leading CRM and ERP platforms (i.e. Microsoft Dynamics 365, Salesforce) and multiple business applications such as Microsoft Power Platform to create, manage, and deliver data-driven and engaging documents with minimal dependence on IT.



### 06. Stored and Organized Content

Keep track of routine PDF forms and documents, logos, images, and multimedia content in the Content Manager. The Content Manager is a secure and structured repository that facilitates and accelerates the management, storage and retrieval of digital assets.