

ReliaFund Inc.

Customer Success Case Study



ReliaFund Inc enhances regulatory compliance and streamlines data organization.

ReliaFund Electronic Payment Services is a leading payment-processing provider. They develop cutting-edge payment processing technology and deliver it with hometown customer support. ReliaFund provides billers and software developers with reliable, efficient services to access the appropriate ACH, credit card, or Check 21 processing platforms to enable electronic collection and disbursement of funds through accounting applications.

Challenge

ReliaFund often produces complex agreements, which are up to 19 pages long and require strict compliance with banking regulations. Their previous manual process involved pre-printed PDFs that had to be filled out, reviewed, and signed, requiring numerous checkboxes and initialed modifications.

With 80% of agreements requiring changes, the company often faced multiple approvals causing increased time delays. The constant changes resulted in inconsistencies in how team members managed modifications. Additionally, collecting applicant data was unstructured, resulting in incomplete information and multiple back-and-forth communications to complete and approve any given agreement.

Product

- Experlogix Document Automation

Benefits

- Accelerated document generation
- Improved accuracy and data organization
- Enhanced approval and signing process

Tech

- Microsoft Dynamics 365
- DocuSign

Solution

After a 30-day trial of Experlogix's Document Automation Solution, ReliaFund immediately experienced a dramatic improvement in its data collection and agreement generation processes. Using Experlogix Smart Forms, the company could create customized forms to collect data in a structured format, reducing errors and enhancing data organization throughout the process. Data is easily collected and automatically organized within Dynamics 365 and everywhere they store data.



“The template designer is full-featured and does everything and its very user-friendly.”

Ross Fillingsness

CISO - Executive Vice President

The seamless integration with Microsoft Dynamics 365 and DocuSign creates simplicity throughout the generation process. Working in Dynamics, employees can launch Experlogix without disrupting the record they are working on, quickly executing workflows. Throughout implementation, Experlogix's dedicated team provided expert guidance, offering creative solutions to optimize the company's agreement workflows and ensure a smooth transition to automation.



Result

Using Experlogix Document Automation, ReliaFund transformed its agreement processing from a slow manual operation into an automated workflow. What once took half a day now happens instantly. The company simplified its approval and signing process, reducing the number of stages from three to two, and significantly accelerating turnaround times. With data validation integrated into a workflow, Experlogix ensured accuracy at every stage, minimizing the need for repeated modifications. Early-stage data collection was seamlessly tied to the final agreement, preventing delays caused by missing or invalid information.

By automating document generation and pushing data directly into agreements ReliaFund created a more streamlined and efficient process, minimizing the need for multiple revision cycles and long approval times. This not only improved efficiency, it enhanced compliance and overall business performance.



“Experlogix Document Automation has taken our process from half a day to instantaneous. Not just shortening the time but eliminating it.”

Ross Fillingsness

CISO – Executive Vice President

Want to learn more?

Speak with one of our experts.

[Get Started](#)