

Financial Services



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The average office:

- Makes 19 copies of each document
- Spends \$250 recreating lost documents
- Loses 1 out of 20 office documents
- Spends \$25,000 to fill a 4-drawer file cabinet and \$2,000 annually to maintain it.

Turn Challenges into Opportunities

Paper accumulates quickly in the Financial Service industry: loan applications, appraisals, buy /sell orders, and regulatory and compliance documentation all go in and out of the office on a daily basis. Even a small firm can accumulate 75,000 new sheets of paper each year.

SMARTdocument Travel is the full-service document capture software for companies that want to better manage their paper and electronic documents while improving productivity, security and compliance. Using existing scanners, copiers, and MFPs, SMARTdocument Travel can dramatically reduce the cost and time spent on processing and archiving any information that enters your organization, in any format.

Key Business Benefits

- Reduce physical storage space by scanning and digitizing all types of documentation including checks, month-end reports, statements, and loan applications.
- Increase customer loyalty and retention with real-time access to account information.
- Expedite loan origination turnaround by reducing the time it takes to process applications.
- Minimize costs from copying, printing, faxing, and courier services by digitizing all paper documents.
- Save time with instant access to text-searchable records across departments and remote offices.
- Improve productivity by automating workflows and eliminating error-prone manual tasks



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Key Features

- Capture paper documents using your existing scanning devices, index and store them in PDF, MS Office, and other formats for easy retrieval.
- Extract business-critical data for market reporting, and export them to business applications and document management systems.
- Improve digitized images of any scanned or electronic document prior to archival.
- Scan once and send to branches, brokers, central offices, and other authorized recipients in multiple locations.
- Send email notifications automatically upon success or failure of document processing.
- Capture and store emails to comply with government email regulations.

Reduce Regulatory Risk

Automate compliance and audit processes to ensure that regulatory requirements, such as Sarbanes-Oxley, are met. Retain, retrieve and distribute documents, and maintain a secure audit trail.

Leverage Existing Infrastructure

SMARTdocument Travel works with existing scanning devices and business applications to automate manually intensive tasks. With a push of a button, you can scan, extract and store data, and deliver it to your financial applications.

Customer Service and Loyalty

Scan and store your client documents securely into a variety of electronic repositories so that inquiries can be answered quickly and accurately.

Automate Forms Processing

Reduce errors and manual steps required to process check images, letters of credit, signature cards – and more. Use SMARTdocument Travel's recognition and image clean-up features to automatically improve the quality of hard to read forms of various sizes and colors.

Eliminate Document Loss

Handling paper documents such as loan applications, invoices, and statements can result in lost documentation. With SMARTdocument Travel, copiers scan and store documents as they come in, and send automatic email notifications to bank officers, brokers, and financial planners.

Records Management

Not only will SMARTdocument Travel reduce the need for physical storage space by digitizing documents, but it will let you control the storage, retention and disposition of records, and to develop audit trails to track all activity for the lifecycle of records.

"Implementing an integrated content management system reduced our loan processing time over 50%, while significantly reducing operating costs, and dramatically improving employee productivity."

Ante Turcinov

Director of Operations
Union Capital Mortgage Corp.