

FINANCIAL SERVICES

Industry Challenges

The Financial Services industry is extremely fast paced and many important documents including financial statements, trade confirmations, and investment applications throughout day to day operations are managed. These financial forms have to be easy to gain access to by employees, secure and retrievable on-demand within the organization. FabSoft offers a wide variety of solutions that will not only provide automatic outbound delivery options for these documents via fax or email, but provide access to archival systems for improved document management.

Industry Solutions

- Effortless form management
- Easy management of documents requiring notes or signatures
- Simple electronic distribution and bates stamping of hard copy documents
- Transparent document approval processes
- On demand form filling printing & archiving
- Secure Release Printing

Who Uses FabSoft's Financial Services Solutions?



Financial Advisors

Banking Services



FINANCIAL SERVICES

FINANCIAL SERVICES SOLUTIONS

Effortless Form Management

Reform allows you to intelligently print, distribute and capture the data contained on statements, invoices, loans and claims. No more bursting and hand delivering documents, now each part of the form can be electronically delivered to its final destination. Also, forms are generated on-demand with up to date information, eliminating the need to bulk purchase and store multi-part forms.

Easy Management of Documents Requiring Notes or Signatures

Tag Doc allows documents that require signatures or notes to be scanned and automatically associated with the information on the document such as client name, associate name, account details, etc. The document can then be archived or routed for further processing.

Tracker —Track Printing/User Output For Efficient Cost Accounting

Tracker allows financial companies to take full control of their print / copy related expenses made by associates. This is done by utilizing advanced monitoring features that enables management the ability to see how many color or black / white copies were made or financial documents were printed.

Secure Release Printing

Print To Me allows financial associates to print financial documents from any local or remote PC. The financial documents can then be retrieved from any network connected MFP at any time if necessary. The implementation of Print To Me increases financial document security, eliminates redundant print jobs, and allows for the smart release of pending print jobs.

Transparent Document Approval Processes

Document Authority Control® (DAC) can be used to automate approval processes. A loan application may need to be reviewed by the loan officer, supervisor, processor and underwriter. DAC intelligently routes documents to individuals, across specific departments or within workgroups for approval. When notification is received, the document can be viewed, approved or changed and routed to the next approver or department. Upon final approval, a copy of the document can be distributed or archived

Simple Electronic Distribution of Hard Copy Documents

Modular Object Scanning Technology (MOST) provide financial institutions with the convenience of scanning & distributing documents right from their multifunctional printers (MFP). Select fax numbers, email addresses, subjects and notes, specify directory locations, indexes, document types, and descriptions for archive systems. For common tasks, quick keys can be assigned to process jobs with fewer keystrokes

On Demand Form Filling, Printing and Archiving

Desktop Filler allow a company to access, fill-in and process forms from the most convenient location -- the MFP screen. After selecting the form, customer data is merged and fields can be entered right from the MFP screen. Forms are now printed with accurate and legible information. Additionally, when forms are completed & scanned, Reform can intelligently distribute them to any printer, fax, email and/or archival system

