

FUSION LASERPRO'S CUSTOM DOCUMENT MANAGEMENT

Custom Document Management Creates Efficiency by Reducing Redundant Data Entry and Minimizing Human Error and Risk



Custom Document Management is a business process improvement tool allowing users to streamline their loan document process by seamlessly integrating supplemental documents into Fusion LaserPro's document package.”

Loan administrators often find themselves manually creating loan document packages that end up wasting significant time and often result in costly errors.

Managing the loan documentation process is a common pain point for loan administrators. Loan document packages have extended to include numerous supplemental documents in addition to the already long list of standard compliance loan documents.

Including supplemental documents to loan packages can be a timely process largely due to disparate document locations, incompatible formats and redundant data entry.

With varying locations, documents can easily be omitted from loan packages creating incomplete loans that delay the process for approval and finalization. Other time spent validating the required

documents are included creates an additional burden on the loan department. The additional redundant data entry creates a greater margin for human error, impacting institutions operational efficiencies and risk.

Whether the supplemental documents are institution specific such as loan checklists, welcome letters, bank specific information, or driven by state specific requirements such as DMV forms, the financial institution simply wants a streamlined document process while the customer just wants their loan approved and funded.

Enter Fusion LaserPro's Custom Document Management...

With Custom Document Management, loan administrators can import supplemental Word or PDF file documents into Fusion LaserPro



Fusion LaserPro's Custom Document Management feature is available within the Total Lending Premium and Complete solution bundles and can provide that added peace-of-mind your lending operation needs.”

With Custom Document Management, loan administrators have an enhanced toolset to drive automation by mapping document fields to transaction data and defining conditions when the document should appear in the loan package.

Custom Document Management also provides loan administrators with increased flexibility and control within Fusion LaserPro's dynamic document package.

Key Functionality Includes:

- Word & PDF document functionality
- Basic and advanced document selection logic
- Notes and history
- Mapping Fusion LaserPro data elements
- Adding document fields to PDF documents
- eSignature integration

With Fusion LaserPro's Custom Document Management You Gain:

- **Flexible, streamlined processes:** Removing disparate document locations and introducing document integration
- **Command and control:** Reducing time and money spent manually gathering loan package documents
- **Simple process through automation:** Removing manual processes and replace them with automation and centralized controls

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today—spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location—from global financial institutions, to community banks and credit unions.

Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 90 of the world's top 100 banks use Finastra technology.

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