



**Reform**<sup>®</sup>  
STREAMLINE DOCUMENT WORKFLOW

# Financial Services

## INDUSTRY CHALLENGES

The financial industry is extremely fast paced, and in order to keep up, document management must be managed reliably. Client paperwork should be easy to access and retrieve, but must also be stored securely. FabSoft's Reform can effectively manage the document needs of any financial organization. FabSoft's solutions automate and streamline workflow, thereby improving productivity for financial companies.

## INDUSTRY SOLUTIONS

- Effortless form management
- Easy management of documents requiring notes or signatures
- Transparent document approval processes
- Simple electronic distribution of hard copy documents
- On demand form filling, printing and archiving
- Hands off postal sorting and address validation for mail delivery

## **About Reform<sup>®</sup>**

*Reform streamlines business workflow by automating document management, enhancement, and distribution. Reform will capture the print stream from any operating system, application, or device; enhance it; and intelligently distribute it to printers, fax, email and archive systems, improving your companies operating efficiency.*

# Financial Services

## About FabSoft

*Established in 1992, FabSoft is a leading developer of document automation solutions that enable companies of all sizes to expand their maximum level of productivity. With over 16,000 installations, FabSoft's solutions have been successfully implemented into the operations of businesses all over the world.*

*Our success in today's market is the result of listening to the needs of our Customers. Our clients are our most valued assets and we will remain flexible to meet their changing needs.*

*Our technical staff is dedicated to providing solutions that deliver superior business value.*

### FabSoft

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## 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 you can electronically deliver each part of the form to its final destination. Also, forms are generated on-demand with up to date information, eliminating the need to bulk purchase and store multipart forms.

### *Easy management of documents requiring notes or signatures*

Reform & TagDoc allow documents that require signatures or notes to be scanned and automatically associated with the information on the document, for example; client name, associate name, account details, etc. The document can then be archived or routed for further processing.

### *Transparent document approval processes*

Reform & Document Authority Control® (DAC) can be used to automate approval processes. A loan application may need to be reviewed by the loan officer, the supervisor, the processor and the underwriter. DAC intelligently routes documents to individuals, across specific departments or within work groups 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 distributed or archived.

### *Simple electronic distribution of hard copy documents*

Reform & Modular Object Scanning Technology (M.O.S.T.) provide financial companies with the walk up convenience of scanning and distributing documents right from their multifunctional office equipment (MFP). Select fax numbers, email addresses, subjects and notes, specify directory locations, indexes or document types and even enter descriptions for archive systems. For common tasks, quick keys can be assigned to process job with fewer keystrokes.

### *On demand form filling, printing and archiving*

Reform & Form 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 even be entered right from the MFP screen. Forms are now printed with accurate and legible information. Additionally, when forms are completed and scanned, Reform will intelligently distribute them to any printer, fax, email and/or archive system.

### *Hands off postal sorting and address validation for shipment & mail delivery*

Reform's postal sorting application maintains the most up-to-date USPS certified postal data available; allowing financial organizations to confidently ensure statements and vital client paperwork are delivered on time. Additionally, mail is automatically CASS certified which qualifies it for USPS discounts of up to 9.5 cents per mail piece.