How Laserfiche Works for Credit Unions

ECM = Document Management + Business Process Automation

› **Streamline the Lending Process**

› **Automate Business Processes in Multiple Departments**

› **Integrate with Existing Applications**

› **Accelerate Audits while Reducing Compliance Costs**

› **Improve Member Service**

In the wake of the financial meltdown and the public's disenchantment with for-profit financial institutions, credit unions have a clear opportunity for growth. But it's impossible to extend service to an expanding membership base without having a solid plan for enhancing efficiency. Successful credit unions across the country are turning to Laserfiche to increase efficiency and improve member service. Laserfiche captures, stores, secures and retrieves critical content such as loan application files, check images and member documentation, and it automates associated business processes as well.

Streamline Lending

Laserfiche transforms the paper- and time-intensive loan application process into an automated, digital form. Laserfiche Workflow, a business process management tool, simplifies loan processing and underwriting.

› Electronically route a member's loan application file through the origination, closing and funding processes.

› Automatically populate member or loan index information to reduce manual data entry.

› Track missing or expired documents to ensure compliance and reduce risk.

› Retrieve documents based on any one of a number of different indexes, including loan number, SSN, EID, document type or collateral description.

› Ensure adherence to loan administration procedures with comprehensive audit trails.

Automate Business Processes in Multiple Departments

Laserfiche eliminates the time lags and redundancies inherent in manual business processes, including invoicing, new account opening, HR processing and more. Authorized users have instant access to relevant forms and records, ensuring seamless transaction processing, reducing the costs of managing information and improving collaboration.

› Automate time-consuming accounting and HR tasks such as invoicing and contract management.

› Utilize workflow technology to expedite the new account opening process.

› Extract data to automatically update back-office systems.

› Retain global control over document filing, retention and disposition while providing different departments with the flexibility to customize their filing structures and workflows.

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Integrate with Existing Applications

Laserfiche's open architecture speeds integration with your existing applications—while programming tools and pre-packaged modules limit costs and minimize the burden on IT staff.

> Integrate with applications that enable remote deposit capture, and store check images in the Laserfiche repository.

> Retrieve information from databases and other back-office systems to automatically populate template fields, validate data entry and check metadata capture.

> Trigger Workflow activities from third-party applications like CRM, COLD, branch automation software and a variety of back-office systems.

> Provide Laserfiche ECM capabilities from Web portals—including Microsoft® SharePoint® sites—to improve information access.

Accelerate Audits while Reducing Compliance Costs

In every examination, whether internal or external, Laserfiche's DoD 5015.2-certified Records Management Edition meets credit unions' digital recordkeeping and retention requirements reliably and cost-effectively.

> Provide auditors with instant access to digital files.

> Reduce the storage burden of complying with recordkeeping regulations.

> Automate document retention and destruction—eliminating lost documents.

> Enforce standard operating procedures that ensure data authenticity, integrity and retention by automating internal processes.

> Constantly monitor document access, editing, printing, deletion and export to maintain the highest standards of security.

Improve Staff Productivity and Member Service

In an environment where efficiency and quality service are vital, Laserfiche enables credit unions to do more with existing resources.

> Improve access to member records and make information available to authorized employees on demand, elevating member service levels and decreasing wait times.

> Automatically route loan documents to the correct employees for review and approval, accelerating processing time.

> Archive and retrieve member records quickly and cost-effectively, without the unnecessary overhead associated with copying, transporting and filing paper documents.

> Reduce misfiling, document loss and related costs.

> Increase transparency by providing a secure public portal that grants members instant access to their information, decreasing the burden on branch staff.

The Next Step: Please call **(800) 985-8533** or e-mail **info@laserfiche.com** for more information.