

Quality Assurance in the Financial Industry

OIT Offers Powerful Document Management Solutions

Are you concerned about falling behind your competition? Are you looking for ways to cut costs while improving loan processing, applications, online banking, account management, human resources, record keeping, and customer services?

Consider a software implementation that has proven itself time and time again in multiple realms of the financial industry.

Optical Image Technology, Inc.'s (OIT) DocFinity® suite of products provides this technology. We offer scalable, flexible solutions specific to the financial industry, and provide infinite possibilities to address your unique needs.

Since 1986, OIT has helped multimillion-dollar global and neighborhood banks, mortgage companies, and credit unions to become more efficient, cost effective and productive. The DocFinity suite has been successfully implemented repeatedly at facilities that require stringent compliance with Securities and Exchange Commission (SEC) regulations.

DocFinity's unique, customizable features and functionalities enable users to automate their business processes, share knowledge throughout an enterprise, improve customer service, and realize significant savings.

DocFinity's integration capabilities, flexibility, and security options make it a powerful choice for IT administrators and it is easy for employees to use. Organizations can implement solutions easily, yielding quick results. It provides successful Electronic Document Management System (EDMS) solutions by remaining ahead of the current technological advances.

By implementing DocFinity software, you can:

Improve customer service

Imaged documents (paper documents that have been scanned, such as mortgage documents, imaged checks, etc.), computer-generated documents (mainframe reports such as month-end reports), e-forms, and e-documents can all be accessed immediately. You'll be able to offer your customers immediate service and answers because your representatives will no longer need to search for customer-specific documents. DocFinity also provides the foundation for implementing an EBPP (Electronic Billing and Payment Presentment) option over the Web.

Integrate with existing systems/other software packages

Every product in the DocFinity suite is capable of integrating with the software you are already using, even in-house, customized applications. In banks and credit unions around the country, our software works with other products, including CRM, ERP, HR, mortgage origination, loan processing, and account management software.

Automate Compliance Processes

DocFinity even provides the tools to enable organizations to automate compliance with the Gramm-Leach-Bliley Act (GLBA), Sarbanes-Oxley (SOX), and other industry regulations. Documentation, retrieval, audits, and reports can all be configured to complement your existing system.

Capture and store email messages

With the advance of communication and business dealings via email, regulations exist stipulating that all email messages must be captured for a period of 7 years. DocFinity provides the ability to automatically capture, index, retrieve, and manage any incoming or outgoing emails and their attachments with our Email Manager module.

Save Time and Money by Automating Processes with Workflow

Electronic workflow simulates business processes, but in a far more efficient and accurate electronic environment. Documents and tasks requiring action are flowed from desktop to desktop, eliminating the physical routing of materials from one desk to the next. Workflow ensures that the right people get the right files at the right time. DocFinity can also manage incoming data from major third-party processors.

OIT has vast experience in providing enterprise-wide EDMS solutions for the financial industry. OIT has more than 25% of its client base in the financial industry including broker/dealer, mortgage, Savings and Loan, Credit Unions, etc. Any area of your institution can benefit from the implementation of an electronic document management system.

With over 20 years of experience providing proven solutions to world-renowned corporations including *Jefferson Pilot, United Trust Fund, Delta National Bank & Trust Company, Microfinancial Corporation, TD Waterhouse Canada, GNI (Old Mutual), and Nationwide Trust*, OIT is well positioned to help your organization save time, paper, and money.

"We can do anything that we want to do. Anything we can dream up, we can do it."

- Diane Schaap, Truiliant Federal Credit Union

For more information about DocFinity solutions, please visit our website at www.docfinity.com or contact our sales department at (814) 238-0038.

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