



## SMARTi Document Submission Archive

### Description

- Secure, unattended, 24x7 Web-based repository for submission, retrieval and processing of time-sensitive documents
- Easy document submission – via eMail, email attachments, fax or MFP scanner
- Save (send) directly from MS Office or Outlook
- Return eMails – for confirmations, error corrections or notifications
- Flexible document indexing, classification, date/time stamping, optional manual metadata completion, image OCR
- Support for document revisions, view revision histories
- Secure, encrypted browser-based access to document repository
- Quickly find documents and folders – by metadata query, query by example, query by email, content search, taxonomy browse or saved queries
- All documents converted to PDF – for view, annotations, print, email and save
- Required documents auditing, easy document workflow routing
- On-line user registration with flexible document security
- Software purchase or SaaS – on-site or off-site

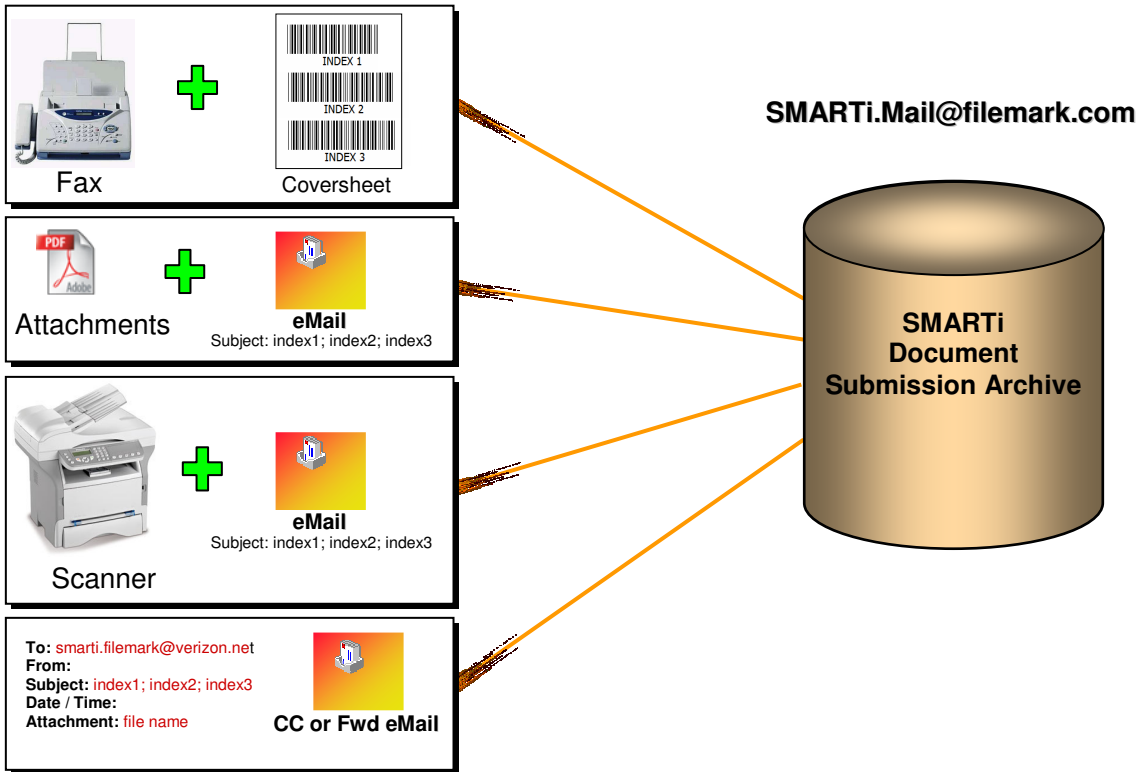
### Benefits

- Clearing house for easy collection and sharing of time-sensitive documents
- Efficient, paperless document submission process
- Saves time, labor and money
  - eliminates the need for clients to copy and mail or physically deliver time-sensitive paper documents
  - no need for clients to print and mail copies of electronic documents – just attach one or more documents to email and send to SMARTi repository
- Consolidates documents from multiple sources and facilitates document sharing among multiple parties
- Enables instantaneous transaction processing
- Eliminates or augments centralized scanning and indexing
- Improves document search, security, control and collaboration
- Ensures process and procedural compliance

### Applications

- Loan Origination
- Escrow
- Student Aid
- Legal Discovery
- Estate Planning
- Tax Preparation
- Auditing
- Invoice Processing
- Remote Business Reporting
- Selective Email Archiving

## Document Capture Options



## Save (send) from MS Office Applications

