

Smart Portals for Credit Unions



What if your data processing systems, web site, e-mail and document files could automatically work together to serve members and your institution better? At NMS Imaging we combined our legacy of providing state-of-the-art information delivery and document management systems, with web portal technology to redefine the potential of portals.

If “ordinary” portals simplify how people use information by pulling it together from many systems and sources, then “Smart Portal Technology” takes the concept of pulling information together to a whole new level.

eFlow is smart portal technology that adds automated information exchange and interactive triggers between the systems behind the portal. This simplifies how organizations put information to work. eFlow also links system information with supporting business documents to provide one-click access to all critical information for your credit union.

Use Case









Smart portal technology automatically formats the HTML data that a member enters into your web page into a document, such as a loan application. It then stores that loan application in a document imaging or content management system, while posting a new loan transaction in your lending system. After that, the application is delivered to a work queue and a thank you e-mail is sent to the member, confirming receipt of the application, and assuring a prompt response.

All of this takes place within seconds of the applicant hitting the submit button on your web page.

As an added convenience the member may print the loan application from your web site and fax or send it through the mail. Once received, it can be imaged therefore triggering the same automated process.

The smart portal continues to maintain additional documents that may be created or received as the loan moves through various stages of approval. The loan “documents” remain linked to the loan “transaction” in your lending system.

Features

-  Automate and streamline work processes
-  Adapt to your web site appearance
-  Information security controls and auditing
-  Single sign-on/single point-of-access
-  Data processing and documents integration
-  Central repository for all information
-  Works with your current core processing system(s)
-  Maintain documents in an organized, member-service-friendly manner

With eFlow...

All member service personnel have real-time access to core processing information and documents with on-demand ability to print, fax *and* e-mail. eFlow can also generate form letters for routine service functions.

"Member Service soars"

All access to member information is tracked with disposition functions recorded and reported to ensure compliance.

"Achieve Compliance"

Users who participate in operating processes need not be consumed with logging into and navigating through multiple systems to get work done.

"Easier work means less training"

Work is queued up to users in the smart portal automatically and systems are updated along the way.

"Work is expedited and the operation produces more in less time"

Information that does not traditionally fit into your data processing system such as faxes, office forms, checks and correspondence are stored and managed in the smart portal.

"Finally, ALL of your management information is truly available in one place."

The need to manually cross reference and update systems is handled automatically.

"Your people spend less time doing mundane tasks and increase levels of service to the member."

Your business information is organized and accessible by means of references that are meaningful to your staff.

"Users do not have to know complicated filing systems or navigate through dozens of software screens, or other departments, to find the information they need."

Internal communication and coordination among branches, central locations, and members is enhanced.

"Reduce errors, eliminating duplication of work, and increase service levels to the member while reducing costs."

In business since 1971, NMS Imaging is a provider of smart portal solutions that enable customers to integrate documents, data processing systems, email communication and the web into one "total information" platform capable of simplifying business process and achieving aggressive return on investment (ROI). Smart portal solutions help businesses, institutions, government installations and organizations simplify their customer operations, back-office and supply-chain operations, thus enhancing front-line customer service.

NMS Imaging is an ISV (Independent Software Vendor), a Microsoft Certified Solution Provider and authorized integrator for EMC/Documentum, ReadSoft, Kodak and Hewlett Packard. Additionally, NMS maintains CDIA certification (Certified Document Imaging Architect), demonstrating NMS' commitment to providing the essential knowledge, resources, experience, and customer relations practices for successful client engagements.

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