Built for Commercial Lending

Accelerate Commercial Lending with Enhanced Loan Imaging & Exception Tracking in AccuAccount

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AccuAccount Feature Overview

INTERFACES

IMAGING

APPROVAL ROUTING

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AccuAccount

TRACKING

AUDIT & EXAM PREP

REPORTING

IMAGING

- Desktop scanning
- Multifunction scanning
- Drag and drop
- Upload
- Virtual printer
- Barcodes

Document imaging is a major reason why banks and credit unions implement AccuAccount. Being able to efficiently digitize, upload, index, and manage documentation expands access to information while reducing risk. AccuAccount makes it easy to get documents into the system by supporting multifunction device and barcode scanning, desktop scanning, batch scanning, "virtual print," and drag and drop. Our playbook shares practical tips for using AccuAccount to work through document backlogs.

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TRACKING

- Credit tracking
- Loan tracking
- Deposit tracking
- Trust tracking
- Notice letters and emails
- Exception reporting

Commercial lending presents a number of exception tracking challenges. AccuAccount offers built-in tracking and reporting for missing and expired documents, tasks, and policy exceptions. Adding new documents into the correct location in AccuAccount satisfies exceptions, thereby reducing manual data entry for staff. AccuAccount also offers solutions for managing recurring exceptions, further reducing the chance for oversights. Deposit, trust, and other teams can also use AccuAccount to support their exception tracking needs.

REPORTING

- Exceptions by officer, branch, etc
- Customer data
- Loan and deposit activity
- Collateralized loans
- Log errors
- User security

AccuAccount users can opt to receive automated reports in their inboxes, thereby increasing visibility for missing documents, aging exceptions, and operational bottlenecks. Alogent also offers Dynamic Reporting for AccuAccount, which allows users to build and share their own custom reports (without help from the IT department). Use AccuAccount to stay on top of loans greater than $500,000, newly created accounts, loan pipeline opportunities, and other key metrics.

INTERFACES

- Core banking systems
- LOS
- Doc prep
- eSign
- Mortgage
- Underwriting

AccuAccount connects to 30+ banking systems, including popular cores. Core banking integration allows for the nightly flow of data to keep loan, account, and customer or member information up to date in AccuAccount. Some financial institutions also choose to connect their LOS (loan origination system), doc prep system, eSign application, and other banking technology.
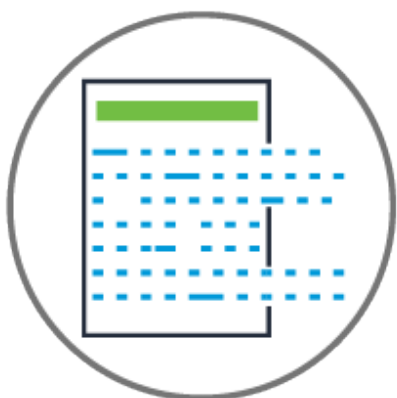
APPROVAL ROUTING

- Start an application
- Collect documents
- Utilize workflows
- Route & approve
- Build & view reports
- Convert to loan

Implementing an LOS can be a costly endeavor that isn't feasible for some financial institutions. For banks and credit unions looking to streamline loan routing and approval, AccuApproval for AccuAccount might be a good fit. Electronic loan routing and approval, detailed application histories, application timers, and early document capture are a few reasons to use AccuApproval. And, perhaps best of all, AccuApproval is included as a standard module with our Enterprise plans.
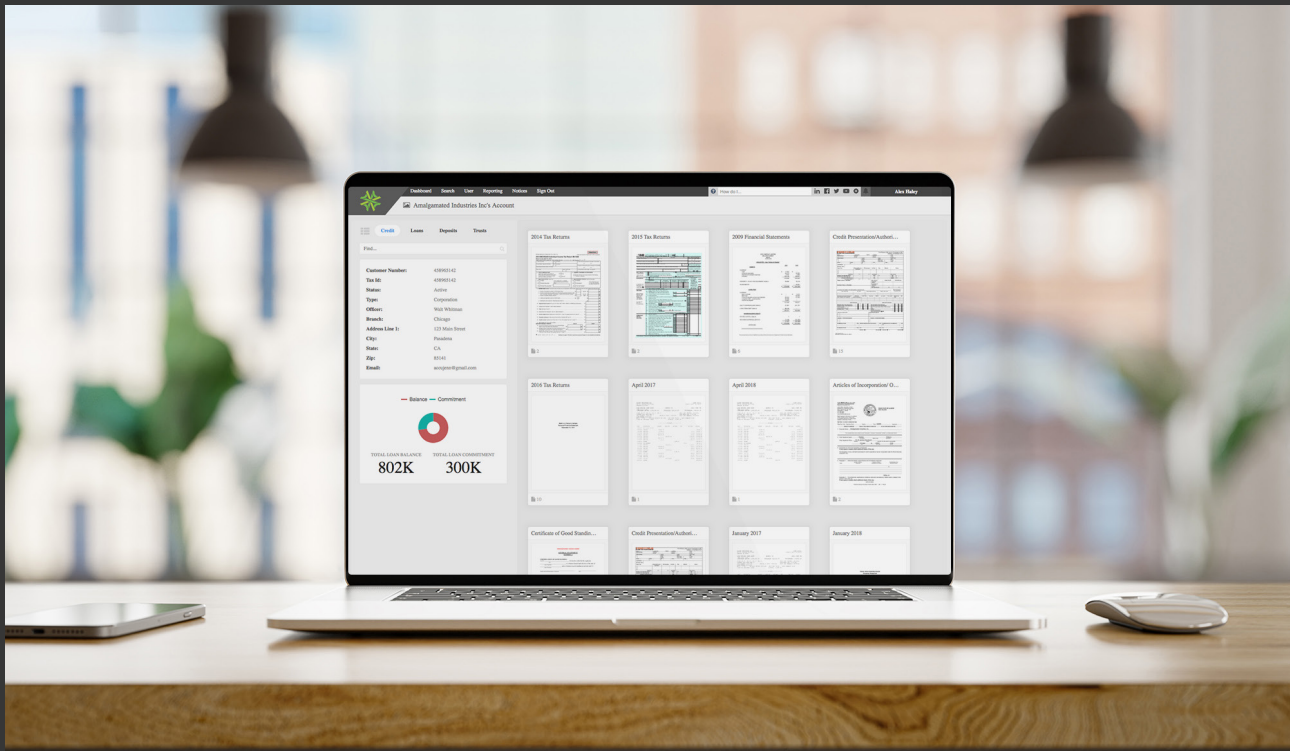
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AUDIT & EXAM PREP

- Less audit prep time
- Send electronically to examiners
- Audit cost savings
- Use for OCC and FDIC exams
- Identify specific documents to send
- Add relationship info from AccuAccount

Auditors and examiners are increasingly seeking technology that streamlines their review processes. AccuAccount offers an intuitive audit export feature that packages requested documents and information into an easy-to-use experience for auditors and examiners. And, with AccuAccount, it may be possible to reduce your institution's audit and exam prep workflow from days to just minutes.

32,000+ Bankers Use AccuAccount

Simplify loan administration and document management with our core-integrated software, AccuAccount. Request a demo to learn about:

• Collateral and loan imaging
• Exception tracking and reporting
• Notices, audit prep, and much more

Visit alogent.com/ecm-solutions to learn more about AccuAccount and Alogent's suite of content and information management solutions.

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Alogent provides proven, end-to-end check payment processing, and enterprise content, information management, and loan management platforms to financial institutions of all sizes, including credit unions, community banks, and some of the largest national and international institutions. Our unique approach spans the entire transaction ecosystem — capturing and digitizing transaction data, mitigating fraud, and automating entire workflows so that information is available across the enterprise. Alogent's solution suites leverage the latest in AI, machine learning and predictive analytics, including enterprise-wide data intelligence and reporting solutions that enable financial institutions to deliver products and services that boost engagement through personalization and data-backed decisions.

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