Alogent

Secure, Standardized Document Intake for Financial Institutions

Alogent Document Portal helps banks and credit unions collect critical documents faster and more securely—without email attachments, manual follow-ups, or disconnected file-sharing tools. By standardizing how documents are requested, submitted, and tracked, it reduces exposure to sensitive data, eliminates friction for staff and account holders, and provides clear visibility across onboarding, lending, and other operational workflows.

Built specifically for regulated environments, Alogent Document Portal replaces fragmented, high-risk document exchanges with a controlled, auditable intake process. Financial institutions gain stronger compliance, improved efficiency, and faster outcomes—without sacrificing the experience for account holders, applicants, or third parties.

BUILT FOR HOW FINANCIAL INSTITUTIONS OPERATE

Alogent Document Portal is purpose-built to meet the security, governance, and audit requirements of banks and credit unions.

- Eliminate email and unsecured file transfers
- Strengthen controls through identity-based access
- Track document status in real-time
- Reduce delays caused by missing or incorrect documents

Each document request is linked to a secure, password-protected user account, improving access control and auditability, while keeping the submission process simple.

A BETTER WAY TO COLLECT SENSITIVE DOCUMENTS

- Secure document intake—without email attachments or unsecured tools for account holders and third-parties
- Standardized, auditable workflows
- Faster onboarding and lending outcomes
- Lower operational effort, compliance exposure, and reduced risk
- Flexible deployment options with Alogent's ECM suite of solutions and third-party ECMs

ENTERPRISE-READY FLEXIBILITY ACROSS ECM ENVIRONMENTS

Alogent Document Portal is available within Alogent's ECM Suite, working seamlessly with FASTdocs and AccuAccount to support secure document intake as part of a unified content and workflow environment. This allows institutions to manage document collection, review, and governance within the same platform used to support core operational and compliance processes.

Alogent Document Portal is also available as a stand-alone solution, integrating with third-party ECM platforms. This gives banks and credit unions the flexibility to standardize document collection across the institution, while preserving existing ECM investments and technology strategies.

- Centralize document intake alongside existing content and workflows
- Apply consistent governance, retention, and audit controls
- Reduce manual handoffs and operational friction across teams

SIMPLE FOR SUBMITTERS. EFFICIENT FOR INSTITUTIONS.

Alogent Document Portal replaces informal exchanges with a clear, trackable process that works for both internal teams and external users. This frictionless experience reduces confusion, minimizes missing documents, and significantly cuts down on back-and-forth communication. As a result, teams gain real-time visibility into document status, complete requests faster, and keep workflows moving without unnecessary delays.

FINANCIAL INSTITUTIONS CAN:

- Select required documents and add instructions or due dates
- Send secure document requests via email
- Track submission status in real-time
- Automatically route documents to review and approval workflows

ACCOUNT HOLDERS, APPLICANTS, AND OTHER THIRD PARTIES:

- Receive a secure email invitation
- Complete a quick account setup
- Upload exactly what is requested, from any device