

# Conversions & Interfaces



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# Overview

Alogent offers the ability to convert images from other products, import data from the bank core and loan origination systems, document imports directly into **AccuAccount** and interfaces with barcodes from doc prep systems.

In this document, we will explain high-level details around which conversions and interfaces Alogent has completed for AccuAccount. Alogent is always willing to work with other products that are not listed in this document. Please contact us to start the discussion.

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# Image Conversions

Alogent has completed several image conversions for AccuAccount from bank cores and third-party products. The image conversions will require a de-conversion from the third-party imaging. The de-conversion file does require some fields to be exported in order to map the images into AccuAccount. (Alogent can supply you with a Required Data Specification on fields needed to complete an image conversion from a deconversion file).

Once Alogent has received the de-conversion file along with a copy of the images that will be processed into AccuAccount, we can then begin the image conversion into AccuAccount.

The image conversion will be scoped by a Project Manager from Alogent and a Statement of Work will be completed to define the process, the cost and the timeline it will take to complete your image conversion.

These are some of the image conversions Alogent has completed for AccuAccount:

- **Director**
- **Synergy**
- **ICORE**
- **Banktrack**
- **TREEV**
- **ImageWorks**
- **AccountFolio**
- **ActiveView**
- **SunTell**
- **ABS Bank Manager**
- **FIS FDM AccountFolio (Name Update From list)**
- **FIS FCM**

- **CSI CenterDoc**
- **CSPI Aurora**
- **DCI iCore (name update from list)**
- **Documentum**
- **EasyFile**
- **File Services Plus**
- **ImageCentre**
- **InfoAccess (OnBase)**
- **Joshua (Trust)**
- **IBE**
- **LQAS**
- **Tab Fusion**
- **Vision Content (Previously known as TREEV)**

# Exception Conversions

Alogent has completed exception conversions from bank cores and third-party products for AccuAccount. The exception conversions will require a de-conversion from the third-party imaging.

The de-conversion file does require some fields to be exported in order to map the exceptions into AccuAccount. (Alogent can supply you with a Required Data Specification on fields needed to complete an exception conversion from a deconversion file).

Once Alogent has received the de-conversion file we can then begin the exception mapping and conversion into AccuAccount.

The exception conversion will be scoped by a Project Manager from Alogent and a Statement of Work will be completed to define the process, the cost and the timeline it will take to complete your exception conversion.

These are some of the exception conversions Alogent has completed for AccuAccount:

- **Precision Tickler**
- **Tickler**
- **Bank Manager**
- **LQAS**

# Data Interface

Alogent can interface with any type of program that can export data. Most commonly, we interface with bank cores and loan origination systems for data. Alogent has some custom data interfaces with other programs to update tax information and flood determinations.

Data is exported from the other product and the data file is placed on the bank's server. AccuAccount is housed on the bank's server and would need access to retrieve those data files. Once the data files are received, the information is ingested into AccuAccount.

Alogent has several standard fields that data can be imported to and then customized fields called "flex fields" can be added to AccuAccount to import other data that a bank may want to see on the AccuAccount Customer Page. All these fields can receive data from other sources or manually added to the system.

# Core Interface

Alogent has imported data from several cores. Not all data is available from all cores. Alogent will share a Data Spec with the client requesting required and optional fields at the beginning of the implementation.

These are some of the cores Alogent has interfaced with for AccuAccount:

- **FISERV- Premier**
- **FISERV-Precision**
- **FISERV-DNA**
- **FISERV- Cleartouch**
- **CSI-NuPoint**
- **CSI-Meridian**
- **OSI**
- **COCC**
- **DCI/ICORE**
- **Jack Henry 20/20**
- **Jack Henry Core Director**
- **Jack Henry Silverlake**
- **ASI Insite**
- **FIS- Bankway**
- **FIS- Bancline**
- **FIS- Horizon**
- **FIS/IBS Insight**
- **FPS Gold**
- **Finastra- Phoenix**
- **Finastra- Sparak**
- **Integrated Bank Technology**
- **Shaw**
- **Sungard (Trust)**
- **AccuTrust (Trust)**
- **FIS Metavante**
- **Flex Juice**
- **FIS Miser**
- **Shazam**
- **BMA**
- **FISERV CUSA**
- **FISERV Signature**
- **PCFS 2000**
- **Nymbus**
- **Jack Henry Symitar (Episys)**



# Loan Origination Interface

Alogent can import data from loan origination systems. This data can start an application within our AccuApproval module within AccuAccount. Importing this information into AccuAccount allows the client to gather customer, loan and collateral documents within the imaging system before the loan books.

Along with data, loan origination systems may allow you to start gather documents during the application process. We can import files from your loan origination system after the loan has booked in the core and the data is updated in AccuAccount.

These are some of the loan origination systems Alogent has established a data interface with for AccuAccount:

- **DecisionPro (LaserPro)**

These are some of the loan and deposit origination systems Alogent has established a document import with for AccuAccount.

- **360 View**
- **MortgageBot/Imageflow**
- **nCino**
- **Encompass**
- **DecisionPro (LaserPro)**
- **Sageworks**
- **Teslar**
- **Newgen**
- **Cloud Lending Solutions**
- **Prelim**
- **Integra Epic**
- **IBS Deposit Operations (DO)**
- **FPS Gold**
- **MANTL**

# 3rd Party Interface

Alogent can import data and documents from other systems outside of the loan origination system and core. Alogent has established two interfaces that allow data and documents to update within AccuAccount.

Here is a list of the 3rd party interfaces:

- **American Flood Research (AFR)**
- **Industry Consulting Group (ICG)**

## **American Flood Research (AFR)**

Website: <http://www.afrservices.com/FloodServices/index.html>

### **Summary**

AFR has a web-service where a customer can request a flood certificate. The AFR interface works by a flex field in AccuAccount which the customer uses to indicate they wish to initiate a request to AFR. The interface will then run and create the AFR request and post it to their web-service. When returned it is saved as a document automatically in AccuAccount in the appropriate account. If the Flood Certificate is not returned, the request is pending and it will wait for the certificate.

## **Industry Consulting Group (ICG)**

Website: <http://www.icgtax.com/>

### **Summary**

ICG is a service that provides property tax information to the bank. This includes data like the amount for the property's taxes, when they are due, and if they are past due. The interface was created to import data to AccuAccount from ICG, and to export property information to ICG from AccuAccount. Import. The ICG interface accepts the ICG defined data file from ICG containing tax status information. The data is prepared so that collaterals in AccuAccount can be updated. Export. The export is triggered by a flex field in AccuAccount. When this flex field is filled, a data file built to ICG's specifications is created with the property's information so that it can be created at ICG for monitoring.

# Barcode Interface

AccuAccount can integrate to free 3 of 9 barcodes, and offers barcode cover sheets if your doc prep system does not offer barcoding.

These are some of the doc prep systems Alogent has established an interface with for AccuAccount:

- **LaserPro**
- **Compliance One**
- **DocMagic**
- **EasyLender**
- **Wolters Kluwer- Medici**

# ESign Interface

AccuAccount can integrate to E-Sign products. This imports the signed documents directly into AccuAccount eliminating the need to re-image the documents once they are e-signed.

Here is a list of E-Sign products AccuAccount has established an interface with:

- **Compliance One E-Sign**
- **DocuSign**
- **JH Streamline ESign**
- **OneSpanSign**
- **ProSign**
- **Kenective**
- **Horizon ESign**

# Screen Integration

AccuAccount can integrate with your current core platform. This allows tellers to view drivers license and signature cards without leaving the core product.

It may require work from the core, and they may charge an additional fee.

- **Jack Henry Core Director Teller Platform**
- **EZ Teller**
- **Jack Henry Vertex Teller Platform**

# Important Information

AccuAccount is not limited to the product interfaces and conversions in the document. Alogent can work with you and your specific needs to establish a custom interface or complete a custom image conversion, if needed.

All projects that are considered a conversion or interface will be assigned an Alogent Project Manager. The Project Manager will work with the client to produce a Statement of Work that will define the conversion/interface process, timeline and cost.

Core data interfaces are included with the purchase of AccuAccount.

All other interfaces/conversions are subject to time and materials cost.

**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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