



Solution for Banks

SOLUTION DEFINITION

The **Bdoc Suite** solution for banks allows you to efficiently handle the mail for clients:

- Personalised loan offers,
- Proposal to buy back loans,
- Management of mailings,
- Banking statements,
- Letter of intent,
- Statement of portfolio actions,
- Amortisation tables,
- Mail Library,
- Credit statements,
- Change operation, deposit/loan, fund transfer, permanent order,
- ...

It meets the banking legislative requirements and helps you conserve a strong reactivity for the enrichment of your documents and a strong performance for their archiving.

In a trade where the services proposed to clients are very close, Bdoc Suite proposes a formidable opportunity for you to propose more attractive client documents and improve all your client communications.

SOLUTION SCOPE

It interfaces with the databases, CRM software, ERP and banking trade applications.

Bdoc Suite for banks is an enterprise level solution that allows, in a centralised manner, creating document models for the business, to link them to the client environments in order to propose a precise professional document to the users, while respecting the enterprise charter and based on the trade context.

It integrates easily to the very centralised, distributed or n-tier computing architectures, and is open to the market standards (XML, Web Services, Java, Thin Client...).

The **Bdoc Suite** solution for banks allows different profiles, from the user responsible to the information systems management, to participate in the composition, production, personalisation, multichannel diffusion and archiving of all documents dedicated to communication with the clients.

Due to the availability of the mail library, the client representatives can:

- Proceed to certain mail modifications and personalizations (for example proposals to buy back a loan) which do not necessarily require computer system development.
Immediately take into account the various legal and regulatory modifications.
- Easily and quickly compose and produce personalised loans that completely meet the expectations of their clients within a very reduce time.

All of this thanks to the availability of a very intuitive document writing station and documentary workflow which considerably automates the agreement requests and/or derogations.



**BUSINESS
DOCUMENT**

DOCUMENT SOLUTIONS FOR YOUR BUSINESS

TECHNICAL COMPONENTS

Bdoc Suite for Banks consists of 3 complementary products:

- **Bdoc Front Office** which is dedicated to the interactive composition and publishing of documents.
- **Bdoc Back Office** which allows the mass composition and publishing of documents.
- **Bdoc Output and Content Management** designed for multichannel diffusion and archiving.



A few key elements of Bdoc Suite:

- A software suite that rests on an open architecture and can be easily integrated thanks to its numerous APIs and Web Services.
- The generation and distribution of the multiple formats of its documents: PDF, MS-Word, AFP...

FUNCTIONS:

Bdoc Suite for banks has a complete functional cover and notably rich functions specifically designed to optimise and facilitate the action by the managers on their workstation:

- Document design.
- Interactive and personalized production, mass production.
- Dematerialisation and management of inbound documents.

- Scheduling and the Workflow.
- Constituting files by assembling heterogeneous documents.
- Multichannel distribution.
- Archiving and restitution.

CLIENT BENEFITS

Flexibility and reliability of the document production chain:

- Reduction of the time required to make complex documents available (Time to market).
- Increase in the productivity and efficiency of workstations by the management of non-structured information within the processes.
- Respect of graphic charts.
- Securing of document content.

Personalisation of communications towards the clients and the suppliers:

- Increase in sales.
- Optimisation of the image conveyed.

Mastering the risks:

- Upgrade and conformity of contractual documents.

REFERENCES

Credit Agricole Group, Casden-Banque Populaire, Charles Schwab, CIT Tyco, Credit Foncier de France, Credit immobilier de France, Accord Bank, Fortis Bank, Gmac, Kredietbank, Societe Generale, Socram, Banque Française, GE Money Bank, Credit cooperatif, HSBC ...

