

# Document Manager



Sharetec's Document Manager takes forms storage to a new level. No longer does the credit union have to be concerned with maintaining expensive filing systems to store member documents. The days of huge filing cabinets and storage areas with hundreds of boxes of documents are gone forever.

## Document Manager

Stores all forms related to your members electronically:

- Loan Applications
- Credit Agreements
- Membership Cards
- Share Draft Agreements
- And much more!!!

The Document Manager captures documents in two ways. First, all electronically designed forms (loans apps, etc) are built into the system and captured electronically at the time of completion. Secondly, any additional forms can be scanned into the system quickly and efficiently. Additional forms can include:

- Power of Attorney forms
- Trust Agreements
- Car Titles
- Insurance policies
- And so much more!!!

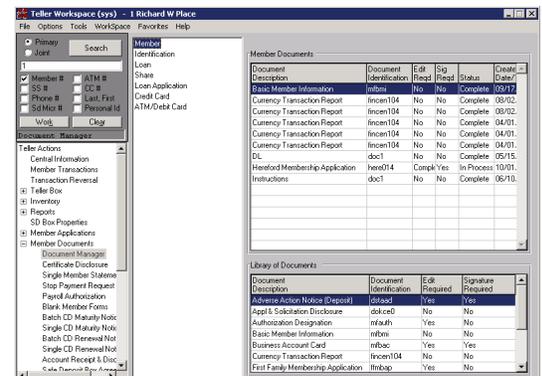
## Electronic Signature Capture

By adding Sharetec's E-Signature capture tablets, your members signatures are attached to the documents and stored along with the document.

## The Benefits:

Your employees have access to all necessary documentation without leaving their desk! Simply select the member number and all of the documents for that member are accessed from one location in the system. No more searching for the loan folder or a membership card. Everything is at your fingertips.

- Saves the expense of off-site storage
- Provides immediate access to documents
- Eliminates the need to make multiple copies of documents for different departments
- Reduces the amount of time spent filing documentation
- Copies of the signed document can be reprinted immediately
- Centralizes member documentation into one convenient location



Every document related to a specific member is located in our Document Manager. Simply enter a Member # and your electronic filing cabinet opens for easy access to all member related documents.

“With Sharetec's Document Manager, we have reduced the amount of time required for research to minutes instead of hours!”

