

Credit union innovates digital document processes with ILINX.

SUCCESS STORY / FINANCIAL SERVICES / TRANSACTION MANAGEMENT

Financial Services Company



Strategic Initiative

COVID-19 disrupted a large credit union's standard practice of collecting signatures at branches and scanning forms by hand, relying on barcodes to link documents to member accounts. During the pandemic, the organization used network share folders to access customer files. Leaders recognized that this created a compliance risk by inadequately securing customers' personally identifiable information (PII).

Solution Plan

The credit union expanded its internal ILINX solution to support a wider range of business processes, such as service agreements, tax forms, litigation documents, and more. ILINX Import intakes e-signed documents from email and network locations. ILINX Capture then identifies SSN and account numbers to automatically attach documents to case files. Security settings limit file access to only authorized users.

Investment Return

Today, the ILINX solution enables business continuity for a range of departments including the credit union's Account Support, Collateral Control, and Litigation units. ILINX innovation supports remote processing while automating and replacing time-intensive, manual document scanning. Finally, it ensures accuracy by eliminating naming convention errors and strengthens information security with role-based rules.

ILINX CAPTURE AND INTELLIGENT WORKFLOW

This foundational workflow automation module lets you capture data quickly and easily from any source and any device. With no page-count licensing, capturing and utilizing data is fast and cost-effective.

ILINX IMPORT

Import files from multiple sources into your workflow. Highly flexible configurations automate metadata capture and improve image quality.



Process innovation made easy.

ImageSource makes process innovation easy through advanced solutions built on ILINX, the world's most flexible process-improvement platform, delivered by a team of experts committed to customer-partner success.