

Document Capture in Financial Organizations

SimpleIndex allows financial organizations, or any company with an accounting department, to reduce the costs of processing payables and receivables, enhance the security of confidential information, and increase access to all records, regardless of their origin. By automating data entry and extracting key information using powerful Optical Character Recognition (OCR), **SimpleIndex** supports scanned loan applications, signature cards, and other paper files, as well as electronic files like Microsoft Office, PDF, and email to combine all records into a single document repository.



SimpleIndex is ideal as an inexpensive scanning and filing system for independent accounting firms and other small businesses, or as a distributed document capture solution for large organizations with multiple locations. Banks, mortgage companies, and investment firms can let their branch offices scan and digitally submit paperwork to the home office and eliminate overnight delivery costs. The low cost and powerful features of **SimpleIndex** allow you to capture and manage an electronic paper trail for all transactions, and increase the accuracy and timeliness of receiving payments.

SimpleIndex will also integrate with your current database or custom business application. We'll help you manage information more effectively to reduce data entry costs, secure and enhance regulatory compliance, and improve client service by allowing you to find information quickly. Further, our **SimpleQB** application is a powerful add-on module for *QuickBooks Pro* users, letting you use data extracted from documents to populate *QuickBooks* transactions.

Benefits of **SimpleIndex** to Financial Organizations



- Streamline Accounts Payable Operations.
- Comply with Check 21, HUD, Bank Secrecy Act, Sarbanes-Oxley, Patriot Act, NYSE, NASDAQ, and AMEX Regulations.
- Combine All Files — Scanned Paper, Microsoft Office, PDFs, E-mail, Audio and Video, Photographs.
- Upload Files into Any Document Management System, Database, or Custom Application. Tight *QuickBooks Pro* Integration.
- Protect Account Records in the Case of a Disaster.
- Eliminate the Costs of Off-site Storage & Courier Services.
- Increase Staff Productivity, Efficiency, and Satisfaction.

SimpleIndex's most powerful feature is its simplicity! Complex scanning workflows can be distributed remotely via email and be performed with just a single mouse-click. Installation is quick, and training is minimal. You can even use your digital copier to scan files and let **SimpleIndex** process them automatically.

Want to learn more? A Free 30-day trial and sample videos are available at www.SimpleIndex.com!