

# Automated Document Manager™

## Identify, Index and Organize Loan Documents Automatically

Outsource providers are always looking for ways to improve process times and reduce exceptions for their clients. ACES Automated Document Manager (ADM), uses advanced optical character recognition technology to automatically identify up to hundreds of documents, index using an easy drag and drop process and help identify missing documents in each loan file.

### KEY BENEFITS

- Available through ARMCO's ACES Audit Technology™ or as a stand-alone product
- Alerts users of any missing documents associated with loan files.
- Save time and money by eliminating antiquated manual processes to reconcile various loan documents
- Pre-defined categories and document types ensure consistency across the client's organization
- Increase efficiencies by utilizing automated processes that provide data recognition confidence levels exceeding 95%
- Boost productivity and review more loans by saving time with automation

## 🌟 Saving Time and Increasing Efficiencies is Key to Your Success



Easily drag and drop loan docs at both the audit and loan level



With over 350 pre-defined doc types, ACES automates the indexing process using doc recognition



Indexed docs are classified into categories for quicker identification



Identifies key missing documents as defined by the client



Missing docs are automatically requested from the responsible party.

**Discover ACES Automated Document Manager**

Call us at (800) 858-1598 or email [QCSolutions@armco.us](mailto:QCSolutions@armco.us)



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ACES RISK MANAGEMENT

## Save time with automated document uploading and indexing

ADM provides a more efficient process for the identification and organization of the multiple documents contained within a loan file. Save time by housing all your loan documents electronically in one place and find multiple documents within seconds with just a click.

## Stay organized with easy pre-defined categories

ADM makes it easy to upload data and index each loan document with customized or preset categories and sub categories.

The screenshot displays the ADM interface with a document viewer. The left sidebar shows a tree view of document categories: Application, Approval, Assets, Collateral, Credit, Disclosure, Employment / Income, Insurance, and Miscellaneous. The main area shows a 'Uniform Residential Loan Application' form with handwritten entries. The form includes sections for 'I. TYPE OF MORTGAGE AND TERMS OF LOAN' and 'II. PROPERTY INFORMATION AND PURPOSE OF LOAN'. The loan amount is \$371,200.00, the interest rate is 6.250%, and the term is 360/360. The property address is 4234 255TH PL, SEB PRELIM. The borrower is ARIAN AND ANNA.

## Identify Missing Documents

The set of documents needed for the loan can be customized by the client and criteria-driven. Documents identified as missing are then automatically requested from the responsible party.

The screenshot shows a table of missing documents. The table has columns for ID, Document Type, Status, Found, Issued Date, Due Date, Action, Status History, and Communication. There are three rows of data.

ID	Document Type	Status	Found	Issued Date	Due Date	Action	Status History	Communication
608	Uniform Underwriting and Transmittal Summary	Received	●	10/20/2017	10/20/2018		Show	Communication
609	Homeowners Insurance Policy	Issued	●	10/20/2017	10/20/2018		Show	Communication
610	Verbal Verification of Employment	Unavailable	●	10/20/2017	10/20/2018		Show	Communication

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