

ACES AUTOMATED DOCUMENT MANAGER™

IDENTIFY, INDEX AND ORGANIZE
LOAN DOCUMENTS AUTOMATICALLY:



**Easy drag & drop
bulk document
upload**



**Optimal Character
Recognition (OCR)
automates indexing
process**



**Categorizes
documents for
quicker
identification**



**Identifies key
missing
documents**



**Automatically
requests missing
documents from the
responsible party**

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.

***"ADM ALLOWS US TO COMPLETE A THOROUGH FILE REVIEW
WITH CONFIDENCE. ACES IS A ONE-STOP-SHOP FOR US."***

JIM TRUCKS

VP & QC Manager at Regulatory Solutions

Save time with automated document uploading and indexing

Stay organized with easy pre-defined categories

The screenshot displays the ACES Automated Document Manager interface. On the left, a sidebar lists document categories such as Application, Approval, Assets, Collateral, Credit, Disclosure, Employment / Income, and Insurance. The main area shows a 'Missing Documents' table with columns for ID, Document Type, Status, Found, Issued Date, Due Date, Action, Status History, and Communication. Below this, a 'Uniform Underwriting and Transmittal Summary' form is visible, containing sections for Borrower and Property Information, Loan Information, and Underwriting Information.

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.

ID #	Document Type	Status	Found	Issued Date	Due Date	Action	Status History	Communication
583	Borrower's Authorization	Received	●	03/18/2020	03/01/2021		Show	Communication
584	Uniform Underwriting and Transmittal Summary	Received	●	03/18/2020	03/01/2021		Show	Communication
585	Flood Hazard Determination Form	Received	●	03/18/2020	03/01/2021		Show	Communication
586	Title Insurance Policy	Unavailable	●	03/18/2020	03/01/2021		Show	Communication

WHY ORGANIZATIONS CHOOSE ACES

**FLEXIBLE
AUDIT
TECHNOLOGY**

**CUSTOMER-
CENTRIC
APPROACH**

**BUILT
FOR THE
ENTERPRISE**