

# eTransaction Solutions for Symitar Episys®

Modern technology and internet access provide consumers the freedom to conduct business when and where it's convenient for them, and from any device that is readily available. These capabilities have become the "new normal" as consumers expect to interact with financial institutions and conduct business in the same manner of convenience as in their personal lives. Are you looking to provide more dynamic and convenient services and experiences to your members? Would you also like to streamline related back-office processes to drive efficiencies and reduce costs?

As a Symitar VIP Partner, IMM is proud to offer our flagship eSignature and eReceipt solutions that are directly integrated with the Symitar Episys core financial system. IMM's eTransaction management solutions, when used with Symitar Episys, allow Credit Unions to deliver enhanced and engaging member experiences when signing financial documents or during inbranch teller transactions. Credit Unions benefit from a totally electronic processing environment that eliminates paper, while facilitating positive transformations in compliance, security, and cost management.

## eReceipts with Symitar Episys

IMM's dynamic receipt solution, IMM eReceipts, produces electronic receipts from teller transactions performed on the Episys platform. eReceipts can include member signatures for relevant transactions. Members can sign receipts using popular tablet devices or traditional signature pads - even at the drive-up window - creating an engaging and gratifying in-person experience.

Transaction receipts can be thermally printed when requested, or conveniently emailed to members in a security masked PDF format. Following the completion of the teller transaction, the finalized receipt is seamlessly stored into the Synergy ECM solution (or other ECM/Imaging solution as required), fully-indexed, and in an easily viewable, industrystandard PDF format.

At the close of the business day, tellers can utilize the system generated teller logs to streamline end-of-day balancing processes and mitigate lengthy out-of-balance conditions. IMM's eReceipts provides the Episys credit union with a comprehensive and modern electronic receipt platform that promotes enhanced member experiences and service, while delivering new process efficiencies to the teller line.



"In the first six months, CoVantage noticed considerable time savings derived from IMM's powerful electronic transaction management. Members love how easy it is to sign documents, whether they are in a branch or signing remotely. The technology also opens the door for the use of tablets and other devices in branch, eliminating the need for traditional signature pads."

# eTransaction Solutions for Symitar Episys®

## eDocuments & eSignatures with Symitar Episys

IMM's flagship eSignature solution, IMM eSign, integrates seamlessly with the Episys system to facilitate error-free, end-to-end electronic documents, and eSignature transactions. Credit Unions can design their own custom documents and forms that include smart logic and business rules embedded within the document itself. This eliminates costly third-party services normally required to produce custom documents and field-mapping.

With the integration between Episys and IMM eSign, credit union employees easily initiate eSignature transactions using an intuitive browser-based desktop. This is achieved without having to specify authorized signers or dragging signature fields onto the document(s). IMM eSign automatically knows and controls who needs to sign documents as well as where they need to sign. This system-level intelligence eliminates employee error and subsequent embarrassing member experience.

Members easily and securely eSign documents at a place and time that is convenient for them. Documents can be signed in-person at a branch or credit union office, remotely on any device including smartphones, or in a combined in-person and remote method, allowing maximum flexibility for multiple parties involved in a transaction to sign using the method that's most convenient for them. Electronic signatures are applied utilizing a wide variety of industry popular devices including tablets, traditional signature pads, or on standard desktop PCs with simple "type to sign" technology.

eSigned documents are secured and encrypted in accordance with prevailing legal and industry standards. This includes comprehensive audit trails generated for each individual transaction. Completed documents along with their audit trail are seamlessly stored into the Synergy ECM repository (or any other Imaging/ECM system as required) as fully indexed, industry-standard PDF files.

IMM's eSignature solution provides the Episys credit union a comprehensive and modern electronic transaction platform that also supports other business applications used by the credit union. This enterprise level solution drives enhanced member experiences and internal process efficiencies across the entire institution.

## About IMMeSign

For over 24 years, IMM has been a leading innovator of eSignature solutions designed exclusively for Financial Institutions. Today, more than 1300 Banks and Credit Unions use IMM's eSign solutions across the Institution to enhance consumer experiences while also streamlining back-office processes. For more information, visit [www.immonline.com](http://www.immonline.com), or call 1-800-836-4750, or follow us on Twitter, LinkedIn, and Facebook.