

Web Forms to Workflow

Our newest eTransaction offering leverages a combination of IMM technology components to deliver a powerful digital transaction processing environment that enables consumer self-service transaction capabilities combined with back-office process automation and task management.

Solution Pack Overview

Financial Institutions are being challenged to meet the rapidly evolving business transaction expectations of the modern consumer. Consumers expect to be able to perform transactions easily, online – when and where they need or want. This includes how they complete account maintenance or service functions with their financial institution and as required.

Web Forms to Workflow allows you to make account processing or service request forms readily available to your consumers through your website. Forms are accessed easily on-demand, completed and eSigned by the consumer. Submitted forms are then automatically routed to the IMM eSign server where specific transaction workflows are launched to facilitate the back-office processes, people, and business decisions required to effectively complete the consumer request or business transaction. Upon completion of all business-rules based and managed tasks, the consumer submitted form, with all related audit files, are archived seamlessly into the Institution's Imaging/ECM system for permanent record-keeping.

Business Case Concept

Let's use the simple example of a change of address form. With Web Forms to Workflow, you can create the electronic change of address form and then embed it into your institutional website or Internet banking system. Now customers can easily locate, complete and eSign the change of address form as they need to and when it's convenient for them.

From there, the completed change of address form arrives in the IMM eSign server – where the corresponding workflow for the Change of Address business process is activated. This customized workflow then manages the back-office tasks and activities required to fulfill or complete the customer process – routing the form to the right people to perform specific functions as required by your standard operating procedures.

Upon completion of the workflow steps and tasks, the form, along with all related audit trails – is then archived, fully-indexed, into your Imaging/ECM system for permanent business record storage.

The Summary of Value

By using IMM's Web-hosted Documents (Widget) capability for online eForms and eSign processing, combined with our advanced eWorkflow technology – account service or requests can be performed online and on-demand for added consumer convenience – while gaining the added benefit of controlling submitted forms across the back office processes for quality, accuracy and efficient processing. The solution pack can be used across a wide variety of business use cases such as Skip Payment processing, stop payment requests, change of address, and transaction dispute forms – just to name a few. The broad applicability and use case scenarios where Web Forms to Workflow can be used will drive substantial benefits across the organization along with significant return on your technology investment.

About IMM eSign

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, or call 1-800-836-4750, or follow us on Twitter, LinkedIn, and Facebook.