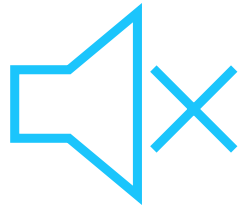


the power of natively integrated solutions

leveraging more



Housekeeping



Lines Are Muted

But we encourage and welcome your participation!



Questions?

Enter them in the Q&A tab at any time, and we'll address them at the end.



Slides & Recording

You'll receive the presentation slides & recording via email.

- **about the presenters**



Tracey Archer-Lawson

JHA Credit Union Sector

Solution Specialist, Business Process Automation



Scott Gleason

JHA Banking Sector

Solution Specialist, Business Process Automation

Our Roles:

- ✓ Support the JHA sales teams
- ✓ Understand FI requirements – align the proper products
- ✓ Uncover and discuss automation tools that FI's *may not* be leveraging today
- ✓ Help FI's ...greatly, **greatly**, increase the customer (member) **and user** experience

Improvement Trends:

- Significant movement to the JH Private Cloud
- Growing desire for end-to-end automation
- 3rd Party Vendor – Re-Examination

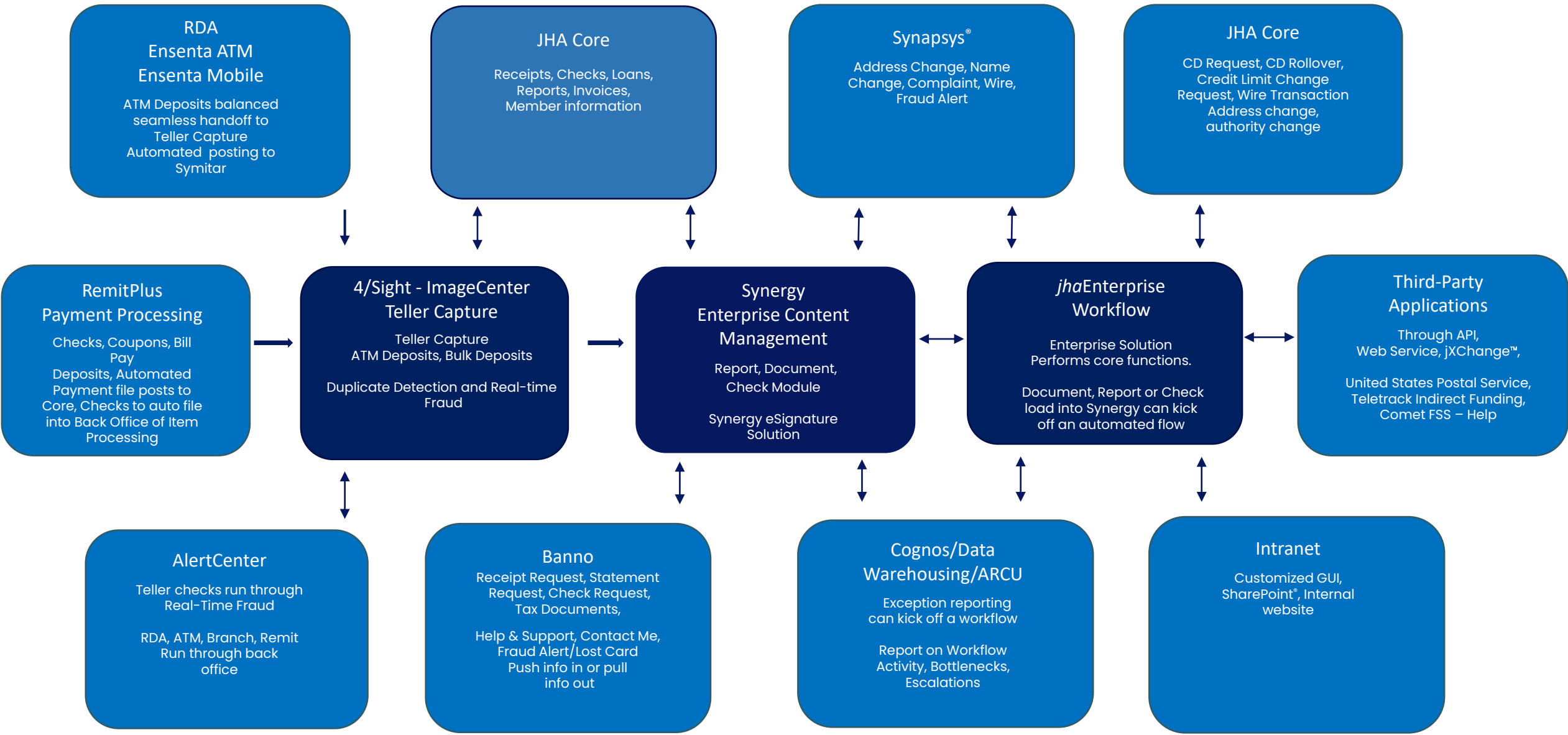


Business Process Advocate...

- **Synergy ECM**
 - Synergy Capture *
 - Auto Document Recognition *
 - Synergy eMail Assist *
 - Synergy eSign *
 - Synergy Migration to Express
 - Synergy Administrator As A Service
- **Enterprise Conversion Services**
- **Teller Capture - Item Processing**
 - AlertCenter Real-Time Fraud
 - Migration to Express
- **RemitPlus ***
 - RemitCentral - Bill Pay => ACH
- **Ensenta ATM /ITM/Mobile Deposit Processing**
 - Real-Time Fraud
- **Financial Crimes Defender**
 - Near Real-Time Fraud and BSA Compliance Platform
 - Wires, ACH, Zelle, ALM, Faster Payments
- **Xperience**
- **jhaEnterprise Workflow**



Leveraging a *Natively* Integrated Environment....*



Success Stories

-A growing FI gets Extreme

-Leveraging eSign to new levels

-using Native Integrations- a tale of two applications



- A growing FI gets Extreme

IS Paperless Really Achievable?

This FI did it....

but HOW????...

Paper is expensive: averaging **\$0.14 per page to print**

Cost of Paper Management: The average FI spends **\$20 in labor to file a document, \$120 to find a misfiled document, and \$220 to reproduce a lost document**



...By Working Smarter not Harder....

**A true Integration Story- Synergy, Workflow ,
... and of course scanning everything-
including mail when it reaches the door**

Integrated applications work with each other to

**-using workflow to distribute and create
electronic content....**

provide employees with access to the
information that they require to do their jobs

**esign to wave to create paper in the first
place....**

**-accessing documents from the
applications they use**

**-Auto Import to pull in documents from
outside sources...**



- A growing FI gets Extreme

...and when that didn't work... things got a bit extreme!

Using Synergy Permissions to **TURN OFF PRINTING** for habitual offenders... and you know who you are-... so do we- Synergy Audit tracks EVERYTHING!!!!...

And for those hard core offenders.... the head of operations did the unthinkable..... **removed desk drawers...** Yes... Removed Drawers!!



This FI sees eSign/eSignWeb as a Powerful communication tool

- Signs documents in branch and remote
- Adds documents when needed electronically
- “would you like a copy sent to you? No Problem!”
- Tracks if users even open email using eSign Web
- Takes advantage of Remote Attachment Requests
- Natively Integrated with JH Deposit origination system and 3rd Party Loan Platform along with Loan Vantage
- Takes Full advantage of MergeDocs, PowerFrame Doc, SymForm
- Adobe Platform- Mega Sign, Web Builder
- **Reduced paper printing and manual indexing by 10x**



Leveraging eSign to new levels

Please review remote authentication details. Click this message to expand for more details

 Design |  Request Remote Attachments |  Back



Bryan Berk




Email


bryanberk14@gmail.com



Message Details


Sender Select Sender  

Template Default Template  

Subject Document Set (for Bryan Berk) 

Completion Deadline 14 days

Transaction expires after Mar 18, 2025.

Message Your documents are available for viewing, signing and printing. 

 Send

Request Rem

Add new attachments and r

Attachment Template: Loan A

Signers

Bryan Berk

Attachment Name

Financial_Statement

Power_of_Attorney_LN

Proof_of_Insurance

Add Attachment

Scott Gleason requests your signature on
Document Set (for Bryan Berk)

Review and sign

Your documents are available for viewing, signing and printing.

As you prepare to sign this agreement, please note that the document asks for the following documents to be attached:

- Financial_Statement
- Power_of_Attorney_LN
- Proof_of_Insurance

ave

Cancel

using Native Integrations- a tale of two applications

"It was the best of times, it was also the best of times"

"By integrating EWF with Synergy Doc Tracking- we were able to take advantage of automated emails , notifications to stay on top of our document exceptions." Takes advantage of Remote Attachment Requests

- Doc Tracking – tracks exceptions such as expired documents and workflow watches for the changes and creates tasks when needed.
- Also emails officers and customers of exceptions.
- EWF notifies when checklist is complete, we no longer need to monitor reports when things happen with our documents.



● Leveraging eSign to new levels

Document Tracking Event Setup

File Room(s): Ovation Bank

Workflow Definition:

Checklist Template: Consumer

Event: Checklist Created

Prevent duplicate workflows

**I want to know
when a checklist is
created.**

Document Tracking Event Setup

File Room(s): Ovation Bank

Workflow Definition:

Checklist Template: Consumer

Event: Past Due

Prevent duplicate workflows

of Days before Past Due: 1

**Launch EWF
when a list is
past due**

Document Tracking Event Setup

File Room(s): Ovation Bank

Workflow Definition:

Checklist Template: Consumer

Event:

- Checklist Created
- Coming Due
- Past Due
- Checklist Created
- Checklist Status
- Document Status

**Track Changes
at the Checklist
Level**

● Leveraging eSign to new levels

Document Tracking Event Setup

File Room(s): Ovation Bank

Workflow Definition: [dropdown]

Checklist Template: Consumer

Event: Checklist Status

Prevent duplicate workflows

Checklist Status

- Complete
- Incomplete
- Pending Review
- Suspended
- Tracking Ended

Checklist status changes- No problem- I got this!

Document Tracking Event Setup

File Room(s): Ovation Bank

Workflow Definition: [dropdown]

Checklist Template: Consumer

Event: Document Status

Prevent duplicate workflows

Document Status

- Inaccurate
- Missing
- Missing Signature
- New Doc Available
- Not the correct Document
- Notify Me
- Officer Review
- Review
- Temporary
- Voided
- Waived

OK Cancel

**Document Level changes
Expired doc- Sends customer request to update, send to CRM, so it appears in teller.**

- ROI- Lets view how using Integrated solutions pay off –(CRM, EWF, Synergy, Teller)

2025 Sample Cost Benefit Analysis (1.5 billion in assets)

Action #	Findings	Estimated Time Saved Annualized	Hourly Salary + Benefits	Expense Realized per Occurrence	Estimated Annual Occurrences	Estimated Expense Reduction	Annualized Benefits \$
1	Use Synergy eSign with Argo for Paperless Forms	1,500	31.43	0.10	6,000	\$600	\$47,745
2	Use Synapsys for New Account Contact Event	1,504	31.43				\$47,271
3	Use EWF to improve Dispute Process	1,200	31.43	0.10	4,800	\$480	\$38,196
4	Use EWF for Address Changes	867	31.43	0.10	5,200	\$520	\$27,770
5	Use Synapsys for Debit Card Ordering	758	31.43	0.10	9,100	\$910	\$24,734
6	Use EWF for New Account Add Product to Non-JHA	752	31.43				\$23,635
7	Teller for Hold Process	650	31.43	0.10	2,600	\$260	\$20,690
8	Use Synapsys & EWF for Deposit Product Changes	325	31.43	0.10	3,900	\$390	\$10,605
9	Use Synapsys & EWF for Stop Payments Process	312	31.43	0.10	1,248	\$125	\$9,931
10	Use Synergy to initiate Death Notification EWF	87	31.43				\$2,734
11	Use EWF for Bulk HELOC Maintenance	30	31.43				\$943
							\$254,253

The image features a dark blue background with three overlapping circles of a lighter blue color. The circles are arranged horizontally, with the central circle overlapping the two flanking circles. In the center of the overlapping area, the word "questions?" is written in a bold, white, sans-serif font.

questions?

jack henry™



Business Process
Advocate

marketing@jackhenry.com

jackhenry.com