

CORRESPONDENCE SHOULD BE BEAUTIFUL

documents

- Letters of Commitment
- Lawyers Instructions
- Welcome Letters
- Year-end Statements
- Discharge Letters
- NSF Letters and Notices
- Maturity Notifications
- Term Deposit Certificates
- Renewal Offers
- Confirmations
- Loan Statements
- Assumption Statements
- Tax Reminders
- Loan Agreements
- Marketing Campaigns

integration

- Investment Management
- Loans & Mortgages
- Retail Banking
- Term Deposits

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Critical Correspondence and Document Automation

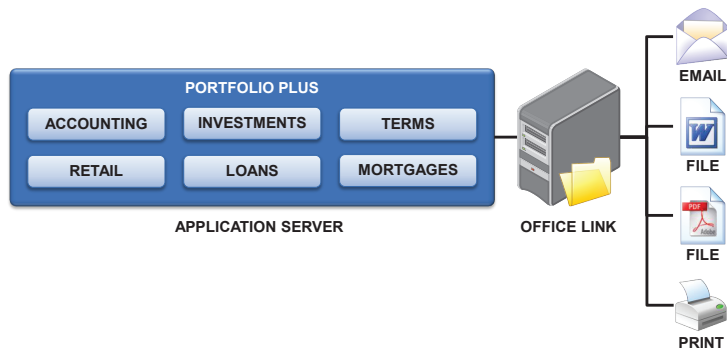
Seasoned marketing, compliance, and legal professionals know how powerful financial documents can be to sell more product, limit liability, and enhance customer relationships. In the absence of any other communication, financial correspondence is often the voice of a financial institution.

Office Link enables you to customize any part of your correspondence. You control the “look” of any document, including the logos, graphics, fonts, and colours.

How Office Link Works

Office Link accepts data from Portfolio Plus and combines it with the power of Microsoft Word. The result is an easy to use document automation technology that can be leveraged for creating documents one at a time or in high volume.

With Office Link you can create new document templates from scratch or use one of over 100 document templates that are supplied. As part of the Plug-In Banking architecture, Office Link can be installed when Portfolio Plus is first purchased, or at a later date.



Banking Correspondence: Opportunities

Billions of dollars a year worth of mortgages and investments renew or change hands based on what is written in paper documents. As such, these documents are mission critical to the day to day operation of a financial institution.

Office Link is most powerful in the hands of those who realize the potential of documents and how they can affect the top and bottom line.