

## Factsheet

# LaserPro Exchange simplifies the borrower documentation process

A modern communication portal to request, upload, and share any needed files throughout the entire loan process.

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**Exchange empowers loan officers to manage the lending process more quickly and productively and keeps communication clear and open with your customers and loan stakeholders."**

Integrating LaserPro Exchange into your solution gives today's customers the 24-hour convenience and security they expect in the modern online banking experience.

LaserPro Exchange is a platform for document exchange powered by Finastra utilizing the Microsoft datacenter, Azure.

Exchange is a cloud-based solution that ensures efficiency through streamlined workflows and security through robust measures. An example of these are the multi-factor authentication and the security of Microsoft Azure tailored for financial institutions and their customers.

### Timing is key

The speed of completing a transaction depends on several factors. An easy-to-use Document communication portal can significantly contribute to faster processing times, leading to quicker access to funds and an improved customer experience.

Your customers will be guided through the upload process securely like the modern online banking experience to exchange documentation such as bank statements, tax returns, and any document needed.

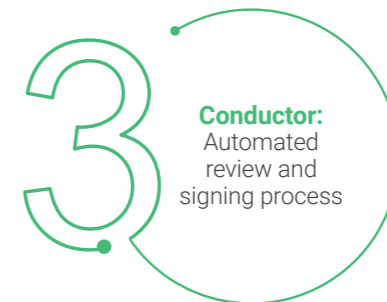
Start your customer's journey from any screen, securely and conveniently.

### Efficiency advantages

All of the customer's private documentation is seamlessly and securely transferred. In addition, Exchange automatically categorizes and organizes uploaded documents.

LaserPro Exchange shows entity or relationship-specific documents within the Portal with a future iteration, eliminating time spent manually sorting, routing, and filing.

## LaserPro Exchange: The Final Piece in Your Product Symphony



Users benefit from streamlined workflows, accelerated loan preparation, and secure document exchange. The intuitive interface of LaserPro Exchange simplifies processes for users to request documents, set due dates, and track the receipt of the document.

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**//**  
*LaserPro Exchange simplifies the borrower documentation process securely and conveniently. //*

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Accelerate loan preparation by expediting tasks. Emails are automatically sent to customers requesting documents. Those documents are uploaded by the customer for immediate retrieval by the institution. Loan officers can set due dates for the customer to upload documents to its secure platform.

### Document Management

LaserPro Exchange provides a lightweight document repository to store documents on the platform, enhancing the spreading capabilities of LaserPro Analyzer.

Documents are collected up front for underwriting, shared at closing, and are collected on an ongoing basis as part of managing the loan. Bank users will be able to view historical documents for reference or reuse going forward in certain scenarios.

You'll be able to search for a document based on:

- Entity that owns the document
- Document status
- Document type
- Date of the document
- Date the document was submitted
- Primary contact for a document

### Instant Communication

LaserPro Exchange is modern and systemized communication between lenders and loan stakeholders supporting email integration between the parties.

Invite loan stakeholders to the portal and notify them that there is an action required for them to complete.

Create personalized templates for each interaction during the document-gathering process to ensure a consistent customer experience and level of service every time.

### Client Management

Onboard the borrowers, guarantors, and various related parties to provide documentation relating to the financial health of the borrowing relationship onto the platform and provide the functionality to submit documents and communicate with the loan officers.

Once an entity is created, you'll have the ability to invite them to the platform. This will be done by sending a link via email with a path to create the account. Once the account has been created, you can interact with that account. This will come in the form of communication and the ability to set a list of required documents with the loan stakeholder able to directly submit documents via LaserPro Exchange.



### Easy onboarding

Onboard bank clients onto the platform and provide functionality to submit documents and communicate with their bankers.



### Clear workflows

Set due dates for the documentation process, the platform will notify the stakeholders to supply the documents and their status.



### Consistent communication

Create personalized templates for each interaction during the document-gathering process to ensure a consistent customer experience and level of service every time.



### Document Centralization

Laser Pro Exchange automatically categorizes and organizes uploaded documents per entity, transaction, and other useful filters.



### Historical reference

Get access to the history of a borrower's activity in the portal and use or review documents submitted in past activities.



Transforms document exchange processes through its cloud-native, share documents from anywhere design.

Users benefit from streamlined workflows, accelerated loan preparation, and secure document exchange.

The intuitive interface of LaserPro Exchange simplifies processes for users to request documents, set due dates, and track the receipt of the document.

LaserPro Exchange is suitable for a wide range of documents including but not limited to the following formats: .pdf, .docx, .xlsx, .JPEG, .GIF, .PNG and may others.

LaserPro Exchange is designed to be user-friendly with an intuitive design to allow you to be up and running in a very short period of time.

Training resources are available for using LaserPro Exchange, though due to its intuitive design, we believe most customers will not require training and will be able to use the application immediately.

## Contact us

### About Finastra

Finastra is a global provider of financial software applications and marketplaces, and launched the leading open platform for innovation, FusionFabric.cloud, in 2017. It serves institutions of all sizes, providing award-winning software solutions and services across Lending, Payments, Treasury & Capital Markets and Universal Banking (Retail, Digital and Commercial Banking) for banks to support direct banking relationships and grow through indirect channels, such as embedded finance and Banking as a Service. Its pioneering approach and commitment to open finance and collaboration is why it is trusted by over 8,000 institutions, including 45 of the world's top 50 banks. For more information, [finastra.com](https://finastra.com)

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