



## eFIRST property

Intelligent document processing and archive solution

**eFIRST property is an intelligent document processing solution that automatically sorts, stores and manages all your tenant and property documents to give you ultimate case management control.**

eFIRST property provides a simple yet sophisticated solution for the growing document and data capture burden facing housing organisations. It automatically performs the processing and archiving tasks associated with every type of



Make your documents work for you

housing and business document including; housing applications, job tickets, survey reports, payments, letters and invoices. It also extracts the required data from any paper or electronic document so you can populate your existing systems with all the information you need without

having to manually key it in.

### Business Benefits:

- Significantly reduce your operating costs.
- Eliminate manual document processing, indexing, filing, retrieval and data entry tasks.
- Speed up response times and improve customer service.
- Reduce administrative errors.
- Conform to legislative requirements.

### The electronic mailroom

All paper documents, including any general correspondence, that arrive into a housing organisation can be quickly scanned into the system without having to pre-sort any of the mail. Faxes, e-mails, web forms and data from hand held terminals can also be imported into the system and treated in the same way. By recognising keywords, phrases and document layouts, eFIRST property intelligently identifies each document

into separate workstreams and automatically extracts all the required data. Information such as constrained handwriting, machine print, bar codes, images, tick marks and signatures are read using the latest OCR and ICR data recognition techniques. The information is then used to intelligently archive each document, as well as to populate existing applications, or distribute the documents electronically to the correct individuals by e-mail.

### Product Benefits:

- Processes all types of documents, eg; forms, letters, e-mails, faxes, invoices and payments.
- Automatically extracts data from all documents.
- Creates a complete record of your tenant and property histories.
- Easy retrieval of documents without performing multiple searches.
- Integrates with all back office processes and database systems.

The system will recognise any type of form or structured document, such as housing applications, and extract the required data automatically rather than an operator manually key the data in. All line items, values and supplier information can be recognised from supplier invoices, job tickets and similar documents. Validation and balancing techniques are used to ensure the extracted data and values are correct before exporting them to the required accounting or housing system. Even customer queries, complaints, account requests, transactions and other types of correspondence are identified and e-mailed to the correct business area or individual for further action.

### An intelligent document archive

For effective document storage, eFIRST property provides an intelligent foldering system that automatically archives all your captured documents. The system builds individual case folders for all documents associated with the same property or the same tenant, without the user having to perform any indexing tasks. These folders are then associated with every

relevant event. For example, if a tenant moves properties, all relevant information automatically becomes linked with the new property. There is no need for an operator to re-file or move the documents within the archive. In addition, the tenancy files will also remain associated with the old property to provide a complete tenant history for every property.

#### Retrieval without the searching

Searching for documents within standard document management systems can be a laborious task. Searches can be restricted to set search criteria and it can take multiple searches to find the correct document. It can also be extremely difficult to find any related documents especially if that document has been re-indexed to a new property.

For effective document retrieval, eFIRST property provides multiple drill-down views to give easy access to any housing or tenancy folder. Whether you search by property, by tenant or by business process, the system provides quick access to each relevant document without the user having to perform more than one search. It also allows you to view a tenant's complete history, as well as identify at what stage each tenant is within any housing process. For example, you can easily enquire which properties are currently vacant, what properties require an inspection or pull up all documents related to a new tenancy.

#### A complete solution

eFIRST property allows easy integration with other third party products and applications. It can populate your existing systems with any data held on your documents, including all the major housing CRM and financial applications. It can work alongside your CRM application or it can be implemented as a standalone solution to provide the necessary CRM functionality you require. eFIRST property can also access legacy systems and databases to unify all your business information systems. In addition The MS Office integration provided with eFIRST property allows standard office document templates to be automatically populated with property or tenancy information held within the system.

By implementing eFIRST property you will save costly storage space, eliminate your manual document processing and data entry tasks, dramatically improve customer service levels and enable staff to spend more time assessing tenant cases rather than searching for files.

#### Business process management

eFIRST property is built on the framework of BancTec's industry leading Business Process Management (BPM) solution, eFIRST process. This allows you to extend the basic functionality of eFIRST property to model and automate business workflows. This means you can use the information stored within eFIRST property to initiate activities, deliver work to the people who need it, keep track of work items and deadlines for work completion and compile performance and compliance statistics. As well as automating existing processes, new processes can be quickly designed and implemented to deliver client services in response to new regulations or initiatives, or to implement temporary solutions to unforeseen situations. These new processes will allow you to re-use existing IT and human assets in cost-effective and controlled ways to improve your services, reduce costs and eliminate compliance risk.

#### Taking control

eFIRST property provides full MIS and reporting statistics so you know how many documents of which type are being processed. In addition, you will also know what task each user is performing and how long that task is taking them.

eFIRST property uses the latest in LDAP technology for controlling user access and authorisation. This restricts what business functions a user has access to and what cases the user can access and work on. In addition, both cases and case items can have notes associated with them. These can be added and amended at any time allowing you to annotate anything you put into the system.

#### About BancTec

BancTec is a worldwide systems integration, business processing outsourcing (BPO) and services company delivering high-volume, mission-critical solutions to automate and streamline data and paper-intensive business processes. As a leading worldwide vendor, at least 50 million documents or items are captured and processed by BancTec systems every day across the world.