

Digitise and streamline the contract management process

The Customer

A major European car manufacturer provides financial services to own or lease cars via a special subsidiary. Their two core products are loans and leases, which are available to private individuals, small to mid-sized companies, and large organizations which have a fleet of vehicles. Financial services are a national/international operation and subsequently they process over 20 000 contracts per year.

The Challenges

A leasing contract process is very paper-intensive and operated across a variety of systems. Typically a “lease contract” is initialized within dedicated leasing applications (eg OnGuard, LeaseBase) and any incoming associated documents in different formats were attached to it. During the approval process, many actions take place on the paper-based files (copy, forward, modification, decision). The leasing company has estimated that approximately 1 out of every 6 contracts received has an error which requires the attention of operations. In addition, lost documents and long retrieval times impact the process and inevitably customer service levels.

The Solution

After reviewing multiple products, the leasing company has selected an OnBase solution with specific objectives:

- Improving Efficiency
- Raising Customer Satisfaction
- Increasing Process Control

Digitisation of the “living” document

Documents are captured from various channels are at every point of the business. The leasing application generates a quotation and/or contract which are captured automatically in OnBase. A mailroom solution has been set-up to capture, index and extract data of incoming supporting paper documents with a third-party capture software.

Documents are imported automatically in OnBase via remote connection with the contract unique reference provided by the leasing application. Emails, faxes which are already in digital format, are imported automatically or on an ad-hoc basis by users, using indexing information already available in OnBase and/or in the leasing application.



Streamline the leasing contract management process

Several processes has been set-up in OnBase Workflow for every main line of business; core/retail contracts, fleets contract, invoicing.

Credit applications are created by dealers in their front–end system integrated with the leasing application. The quotation and contract (if accepted) are automatically uploaded in OnBase which initiate the process. The OnBase Workflow is then used to automate the documents verification, provide an interface for user approvals with all related documents, route documents to accounting or any other departments.

Integration with leasing and dealer front end applications

The main interface for most users remains their leasing or accounting application. OnBase provides a seamless and non-programmatic integration tool which enables to provide to employees all the supporting documents when they need it. Custom integrations are also developed for some processes which automate data transfer between vehicles registration system, dealer front-end system. All actions are tracked in the system enabling full audit and reporting of the processes.

Unique platform, serving all users

Despite several processes and countries, a unique system is provided to serve all users. Located in the main IT server platform, OnBase is available to all users via a Web Client, the Office and Outlook integration or via the integration tool. A “one-click” deployment technology minimize IT workload.

A single platform does not mean a single view. Each country / department has restricted access to its documents and data thanks to a granular security at document or keyword type level. Documents are immediately available to those who need them in a secured and reliable environment.

Why OnBase?

Your processes need to be flexible to keep up with competitors, trends and regulations. OnBase puts the power to make process changes in your hands. Point and click configuration means there is no need to call our developers when you want to make a change.

- Adapt the system to your business needs in real-time
- Expand the solution quickly across processes and departments
- Eliminate paper-based delays and costs with automated processing

time to make a difference.

Get more information out of existing business applications. Reduce, even eliminate, wasteful, redundant tasks. Now you can spend your time on the things that really matter. That's effective document and process management.

That's the OnBase difference.

Learn more at OnBase.com

OnBase
a Hyland Software solution