

LOAN FILE TRACKING & MANAGEMENT



Getting Results

FileTrail™ generates dramatic labor-saving results to provide banks with bottom-line benefits and a quick ROI.

FileTrail saves as much as 75% of labor in filing and retrieval processes, providing faster response and reducing delays.

The easy-to-use Web interface ensures high user adoption and use of search and request tools.

Integration with Origination, Servicing and other systems is easy, and keeps information in FileTrail synchronized.

Powerful configuration tools provide a custom-solution at a product-price.

Automated labeling puts color coding, text and a bar code on a single label, saving up to 60% of labor in file creation.

Customers Speak Out

"FileTrail helped us consolidate six different operations into a single, centralized loan vault. We now track and handle requests for over 100,000 loan files with a much lower operating cost."

*Linda Ceno
Mid America Bank*

"FileTrail saves us so much time because we don't walk around looking for loan files any more. I can find any file in FileTrail without leaving my desk."

*Lisa Wickser
Ameriquest Mortgage*

Never Search for Another Loan File

Managing loan-related files has become a high-profile problem for growing banks and mortgage companies. FileTrail automates tracking to provide timely access and retrieval. With FileTrail, you can improve profitability by reducing operating cost, increasing quality of service to clients, and sail through audits. FileTrail is the ideal loan file tracking solution.

Gain Control Over Loan Files

Loan files have become more difficult to locate and control. Moreover, growing loan portfolios and bank mergers increase the difficulty of gaining control. Locating credit and loan records quickly can be the key to your quality of service and competitive edge. Proven processes and reliable retrieval are keys to successfully completing audits. FileTrail offers the resources you need to effectively control your loan files.

Save Time and Reduce Labor Costs

FileTrail eliminates staff frustration over lost or unavailable records and saves labor and time. It enables your staff to:

- Interface with Origination and Servicing systems eliminates data entry
- Automate retrieval of hundreds or thousands of files for internal or FDIC audits
- Simplify loan file retrieval for secondary marketing and sale of loan portfolios
- Easily monitor and manage the status of critical documents
- Instantly locate loan files, so staff waste less time hunting for files
- Standardize file labeling and presentation

All Staff Benefit From FileTrail

FileTrail helps you control loan files, automates back-room operations and streamlines staff activities. You can:

- Locate files at any time from any workstation
- Request or schedule retrieval from any PC
- Track through multiple departments, from origination, servicing, bankruptcy, etc.
- Use image viewing to reduce file retrievals
- Reduce retrieval and filing labor by up to 75%
- Prevent creation of duplicate files

FILETRAIL™

...because Paper Happens®

<http://www.FileTrail.com>



About FileTrail

FileTrail has been providing records and information management solutions to the banking and mortgage industries since 2001.

Our solutions reduce operating costs for credit card, consumer lending, commercial lending, trust and other operations, using bar codes or EPC-standard RFID.

System Requirements

FileTrail is a 100% pure Web application. Your solution may be installed on your server or hosted by FileTrail.

Application Server: Windows 2000 or 2003 Server

Database: Access 2000, SQL Server 2000, or Oracle 9i

Workstation: IE 5.5 or later, or NN 6.0 or later

Please see:

http://www.FileTrail.com/ws_tech/Specifications.asp for details

FILETRAIL™

...because Paper Happens®

<http://www.FileTrail.com>

Paper Happens is a Registered Trademark of FileTrail, Inc. FileTrail and the FileTrail logos are trademarks of FileTrail, Inc. All other logos and trademarks are property of their respective companies.

© 2004-2005 FileTrail, Inc. All Rights Reserved.

Flexible Features To Meet Your Needs

FileTrail offers a wide variety of features to meet your unique business needs.

- Bar code label printing and label designer
- Print color codes, bar codes and text on a single label
- Enjoy fast check-in and check-out with bar codes
- Use integration tools to load and update loan data
- Audit the file room, vault, and staff offices
- Provide access to branch and retail locations
- Passively track files with RFID technology
- Secure exits with lights and alarms using RFID
- Powerful security system controls access and capabilities

Advanced Tools Automate Routine and Manual Tasks

- Powerful **Batch Search** tool facilitates retrieval of large groups of files and documents. Simply copy and paste a list of loan numbers from an email, Excel column, Word table, text file, etc., to generate a Pull List for streamlined retrieval.
- **Automatic Authentication** saves time by leveraging your current user authentication method. Users are automatically logged in using AD, LDAP or Site Minder.
- Complete **Request and Fulfillment** subsystem saves labor and improves service levels. Email, voice mail, fax and phone requests are consolidated into one efficient process.
- Flexible **Shelf Configuration** tools dramatically reduce operating costs in large servicing operations. Tracking to specific shelf locations allows non-linear filing, ending the labor-consuming, periodic "re-shuffling" of shelves.
- Powerful **Filing Order Configuration** saves labor by automatically sorting Pull Lists and Refile Lists to the filing order of each section. Supports alpha, numeric, Terminal Digit, etc.
- Configurable **Integration and Synchronization** tools save labor by automatically updating FileTrail with data from upstream systems. Data entry is eliminated and FileTrail is synchronized with one or more upstream resources.

Contact FileTrail Today!

For more information about the benefits of automating your clinic, contact FileTrail or your local FileTrail representative at:

FileTrail, Inc.
Bank of America Building
12 South First Street, Suite 107
San Jose, CA 95113-2417

Telephone: 800-310-0314
Email: info@filetrail.com
Website: www.filetrail.com