

A person in a white shirt and dark trousers is climbing a massive, towering stack of papers that fills most of the frame. The papers are stacked high, reaching towards the top of the image, and the person is positioned on the side of the stack, reaching up towards the top. The background is a plain, light color.

CASE  
STUDY

**US Mortgage & Banking  
Company Centralizes &  
Streamlines Loan  
Document Classification  
process**



## CUSTOMER PROFILE

The company was a Top 10 Mortgage and Banking Company in the United State headquartered in Florida. Their growth each year starting in 2006 was phenomenal, and it grew from \$5 Billion USD in lending, to a portfolio of \$45 Billion in 4 years.

## BUSINESS CHALLENGE

The company process of scanning and manually classifying loan documents created several challenges.

- Burdensome document preparation
- Software processing delays
- Limited Workflow visibility

Because of the processing backlog, there was always a delay in answering the customer's questions and started searching for alternative solutions.



## CASE STUDY

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## SOLUTION

NDS Global arranged meeting with client's management team to closely understand the requirements and deployed developers to work on the requirements and the company required workflows.

To meet the requirements, NDS Global used SharePoint as a business collaboration and content management platform for developing the application.

The solution extended the features of SharePoint, enhancing user experience and adoption.

Within SharePoint there was a central configuration of indexing, database validation and lookups, a configurable web part for flexible content-centric metadata based document search, viewing and printing from directly within SharePoint.

Once a batch had been completed captured, document-classification was done automatically to determine whether six critical document types exist within the batch: cover page, retail installment contract (RIC), title, payment history, credit application, and bill of sale. If the six document types were found, the batch proceeded to extraction.

## BENEFITS

The solution provided the following benefits:

- Streamlined the document preparation
- Reduced labor
- No processing backlog

## TECHNOLOGY



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## ABOUT NDS GLOBAL

NDS Global, a trusted Microsoft Gold Partner, offers its customers consulting, implementation, development and support services on Enterprise, Cloud & Mobility for digital solutions.

NDS Global helps customers realize results in a digital world through business technology solutions, cloud and managed services that combine insight, innovation and expertise focused on Microsoft technologies.

Our solutions span across Microsoft Project Online, Microsoft CRM Online, Microsoft SharePoint Online, Office 365, Dynamics 365, Microsoft Dynamics AX, PowerBI & Azure.

Headquartered in the US since 1999, we are preferred partners to customers in USA and India. Our customers span across Consumer Goods, BFSI, Infrastructure, Manufacturing, IT/ITES, and Retail.

A strong team of 180+ Microsoft consultants have provided many a success stories to Enterprise & Small/Medium customers globally.



## SCHEDULE A DEMO / WORKSHOP

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