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Unlocking
Efficiency & Innovation
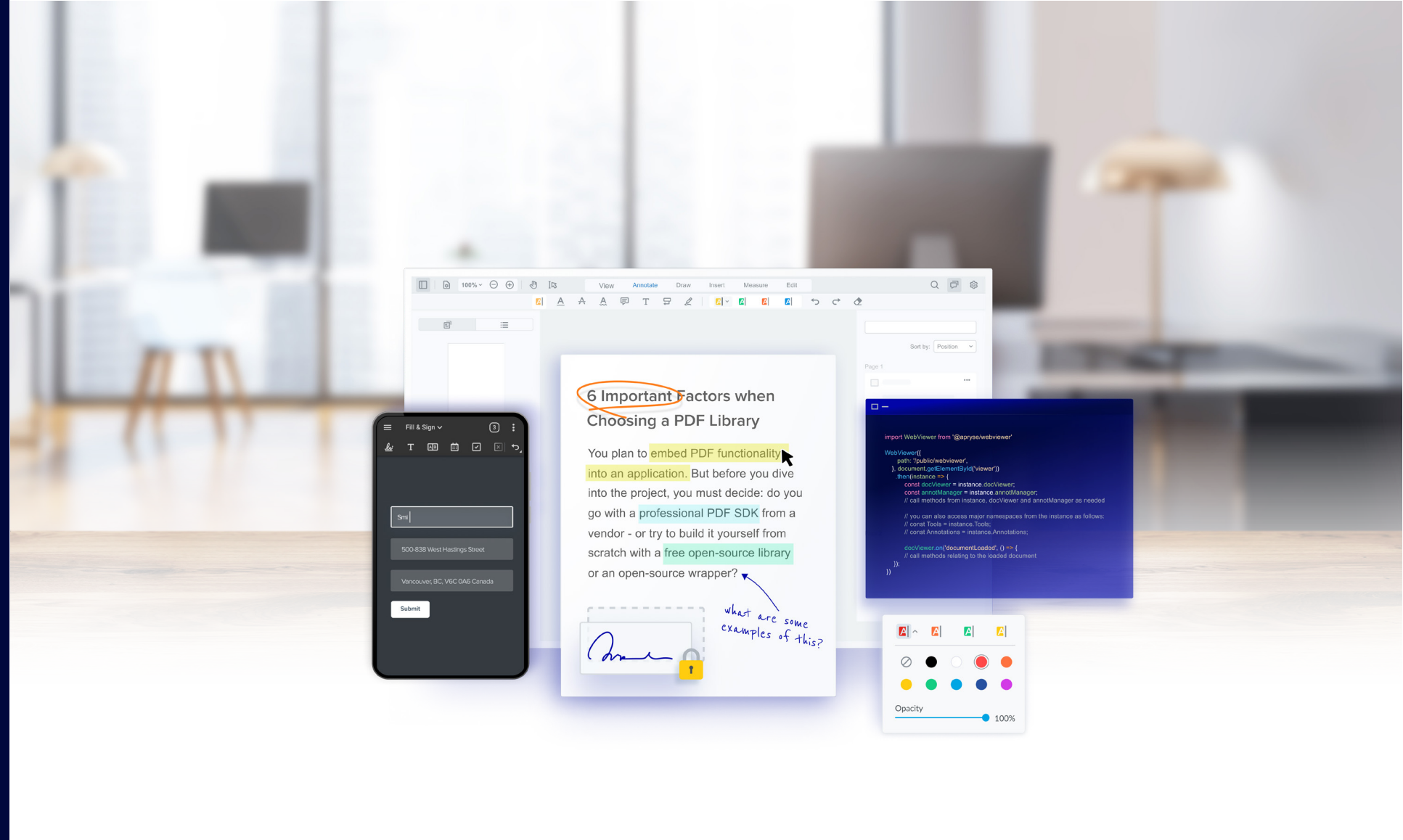
Document SDKs for Financial Services

🌐 apryse.com

Experience
Seamless
Document Management and Transformation

A Document SDK, or Software Development Kit,
is a powerful tool that empowers financial service companies to integrate,
manipulate, and manage documents programmatically within their applications.

The Main
Challenge
In The Financial Industry

Manual document processing poses challenges due to errors, delays, and complex transactions.
Time-sensitive demands clash with manual data entry, causing inconsistencies and reduced productivity. High paperwork volume overwhelms staff, diverting resources.
Security weaknesses in manual processing heighten compliance and data breach risks.
As the financial sector aims for digital transformation, these challenges highlight the critical requirement for automated solutions to improve accuracy, efficiency, and data security.

Where Apryse Bridges the Gap:

Loan Origination
Provide a self-service experience with online fillable forms that then convert to pdf or MS office archiving.

Claims Management
Receive and resolve claim information online all in a secure and familiar browser experience.
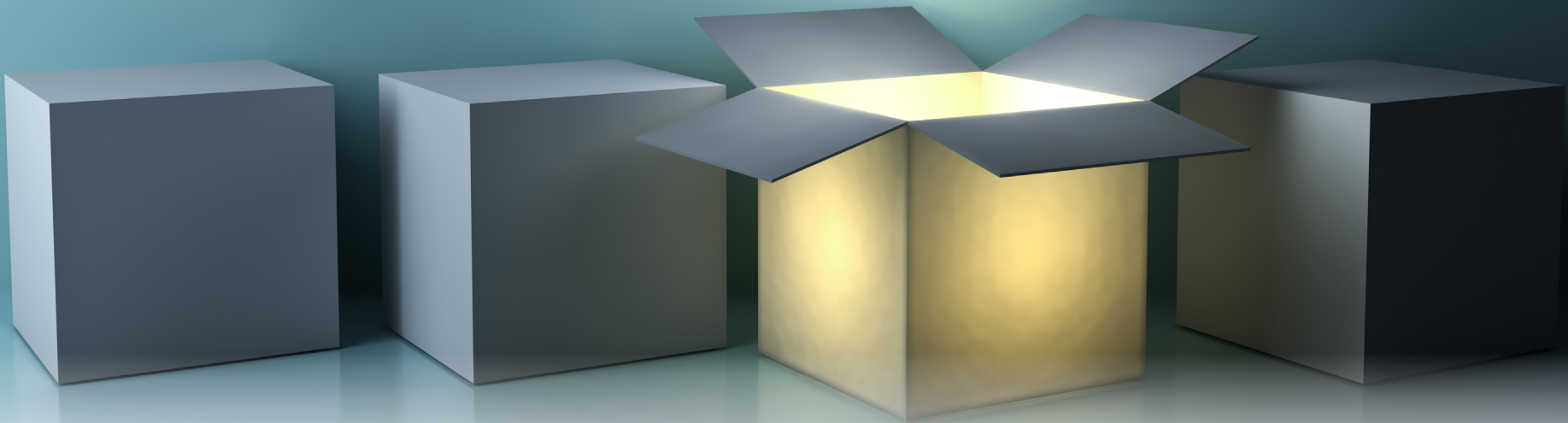
Financial & Compliance Reporting
Bring together multiple data sources to share reports with regulatory bodies. Create templates that can be modified.

Document Conversion and Optimization
Convert docs to pdf/a for long term storage and compress to minimize storage requirements.

Underwriting
Support complex workflows including editing, annotations, conversion, and collating of files for a complete assessment of the applicant.

How Can
SDKs
Help?

**Apryse's out-of-the-box solutions
provide a unique platform specifically designed for:**

Automation
Automate document creation, conversion, extraction, and merging to eliminate time-consuming manual tasks.

Accuracy
Ensure data accuracy by reducing manual data entry through automated document processing.

Compliance
Maintain regulatory compliance by accurately generating and storing necessary documents.

Customer Experience
Enhance customer experiences by providing quick and accurate document-related services.

Collaboration
Enable secure and efficient document sharing and collaboration among teams and clients.

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Why
Apryse
Over Anyone Else?

PROVEN BACKING

Supported by renowned investors Silver Smith Capital and Thoma Bravo; with a history serving billions of users, millions of developers, and thousands of global enterprises.

CORE SECURITY

Our SDK, fully embedded in your app code, ensures data security by eliminating external calls and transmission. This client-side processing minimizes risks, ensures industry compliance, and keeps user data securely on their devices for top-tier security.

RELIABLE EXPERTISE

Apryse SDK, developed in-house for 20+ years, guarantees accurate document rendering, conversion, and processing, ensuring unmatched reliability.

EXCEPTIONAL SUPPORT

Our robust **support** and meticulous documentation provide unmatched guidance, empowering your journey with top-tier technology and industry-leading assistance.

PROPRIETARY CUSTOMIZATION

Our exclusive PDF SDK offers unparalleled customization, reliability, and peace of mind, enabling you to prioritize innovation and growth over troubleshooting and maintenance.

"PDFTron [Apryse] helped development in our organization move significantly faster and greatly reduced the time we spent building templates for collecting information"

RYAN FRANK
First Business Bank's Manager of Application Development

First Business Bank, based in Madison, WI, offers comprehensive commercial banking, private wealth, and consulting services.

Their client-centered approach and low "business-to-bank ratio" have led to loyal customers, contributing to their **$2 billion** assets under management and NASDAQ Global Select Market qualification.
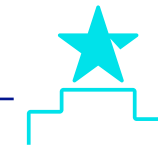
First Business Bank
Case Study

The Challenges

⚠ They required a single set of professional, native components to power onboarding paperwork across its many different products and services

⚠ Needed to reduce business time taken to develop templates for capturing information

⚠ Improve the rendering performance to enable interaction on all types of documents

⚠ First Business Bank sought an integrated document solution for Salesforce that prioritized data retention on the platform and JavaScript-based technology. Initial options lacked functionality and raised compliance and reliability concerns. The discovery of Apryse offered a seamless solution through Salesforce integration with a user-friendly, open script-based approach.

"Every codebase has some gotchas, in that you need to learn how they're doing things, but [Apryse's] documentation has been wonderful. I haven't had to contact engineering support once. Instead, we could download it and, step by step, see how to use it in the Salesforce ecosystem. After that, it just worked, and it was easy." **~ Ryan Frank**

The Results

★ Seamless Integration: Apryse integrated its comprehensive, professional features into Salesforce via a **WebViewer** optimized as a Lightning Web Component.

★ User-Friendly Code: The plug-and-play code enabled easy enablement; however, custom code could still be added openly, unlike other solutions that required hidden code calls.

★ Rapid Implementation: First Business Bank swiftly achieved 70% of their required document functionality within two days of using Apryse.

★ Supportive Documentation: Apryse's well-documented resources eliminated the need for engineering support. The step-by-step guidance eased any growing pains while being introduced into the Salesforce ecosystem.

★ Efficiency and Performance: Apryse reduced template maintenance effort, allowing focus on core tasks. Superior rendering performance, particularly for small print, enhanced user experience through WebViewer's client-side rendering.

"In our benchmarks, iText by Apryse was the clear winner in both its performance and HTML to PDF capabilities."

RAVI VEMULA
VP of Payments Engineering at Green Dot

Green Dot Corporation, a US-based fintech and bank holding company, has served over **33 million customers** with its retail and direct-to-consumer offerings.

Additionally, its Banking as a Service (BaaS) platform supports numerous leading brands, enabling fintech firms and prominent consumer and technology companies to create and launch customized banking and payment solutions.
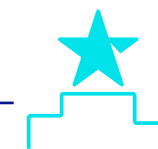
Greendot Bank
Case Study

The Challenges

⚠ In the rapidly evolving digital banking and BaaS sector, the speed and reliability of services are paramount.

⚠ Green Dot was searching for a solution to dynamically generate around 80 million statements on-demand annually, necessitating a solution capable of high-volume, server-side PDF generation.

⚠ Since the team chose HTML templates for easy conversion to PDF and flexibility, they needed a vendor with extensive CSS support, which was another essential requirement.

⚠ Given Green Dot's diverse client base, the ability to customize templates to individual client needs was essential. This includes adding logos and client-specific information during new customer onboarding.

"We're very happy with iText's performance. Everything works as expected and rendering HTML templates as a PDF goes very smoothly."
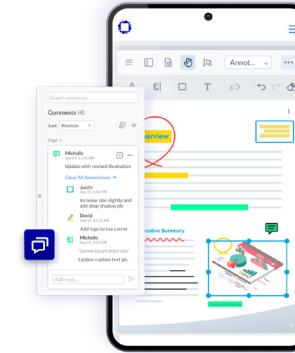
~ Ravi Vemula

The Results

★ Since iText by Apryse is widely used in the banking and financial sector and is a well-known solution for PDF creation and manipulation in both Java and .NET, it was an obvious choice.

★ Within the Apryse portfolio of SDKs, iText is particularly strong in its support for CSS. This enables their templates to be swiftly customized with CSS tags for company logos, graphics, and styling.

★ Green Dot also leverages PDF form fields, or AcroForms, for template creation. The iText Core library efficiently automates the filling and flattening of these forms.

★ For new BaaS customers, the system prompts iText to fetch data using the account holder's number, dynamically filling the HTML template with necessary data. The PDF statement is then generated in real-time and provided to the account holder.
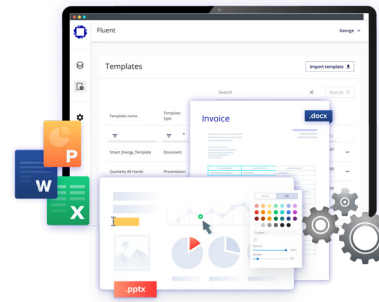
Key
Features

View & Annotate Client-Side

Open various document formats (PDF, Office, images, videos) securely within the browser. Choose from 35+ annotations or create custom annotations directly on the client-side.
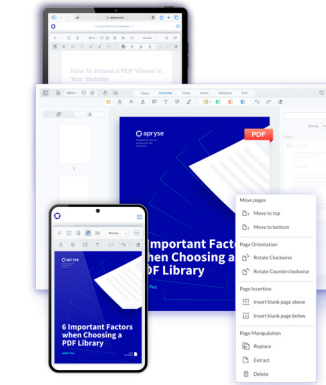
Collaborative Real-Time Review & Approval

Collaborate with others in real time on document reviews. Utilize mentions, tags, and annotation statuses for effective collaboration.
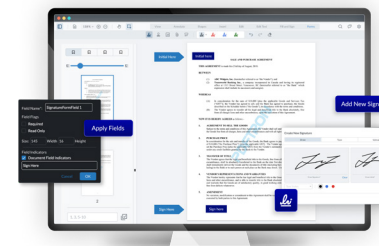
Generate Documents from Data & Templates

Connect data sources to create reports, loan applications, and more. Accelerate workflow automation in a secure environment.

PDF Text Editing & Manipulation

Enable quick text edits in PDFs with text reflow and image support. Embedded in workflows with audit trails and user permissions.

Digital Signature Workflows

Establish customized signing workflows. Manage signature field assignment, creation, collection, and validation.

Intelligent Data Extraction Automation

Extract and process data, text, and tables from scanned PDFs. AI-powered accuracy recognizes diverse document layouts for structured JSON output.

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Experience
The Future
Of Document Management

Discover the transformative capabilities of a Document SDK for financial services. Unlock efficiency, accuracy, and innovation while enhancing customer experiences and staying compliant.

Embrace the power of automation today!

For more information, visit **apryse.com**

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