



INFOVISA Creates Document Management Integration for Trust Accounting Clients

December 19, 2014 – Cornelius, NC based INFOVISA™ has created a new document management integration for clients of its trust accounting solution, MAUI™. Using the document management system, INFOVISA clients are able to upload documents for viewing within the MAUI system. The new integration leverages MAUI's existing workflow capabilities to route documents and processes within each department. INFOVISA clients can use the document management feature to store and organize several document types, and easily search the documents without maintaining the files in folders on their network. INFOVISA will also provide storage and redundant backups of the files to clients utilizing MAUI Cloud Services, INFOVISA's software-as-a-service offering.

INFOVISA's President and CEO, Mike Dinges, explained, "Prior to the release of this feature, our clients had the ability to view documents stored on their network within our trust accounting system. That solution relies heavily on our clients designing and maintaining directory structures to organize the documents" Dinges went on to say, "The solution that we have now developed for managing documents reduces the time and effort that is necessary to handle this required function, and removes the burden of maintaining that document structure. The system provides a more cost effective solution than maintaining the files manually and eliminates the need for researching another third-party vendor that might provide such a service. Once a document is scanned or produced, the entire process is now managed within our trust accounting system, MAUI."

INFOVISA partnered with Covenant Trust Company, an INFOVISA client, to create an automated solution that meets the needs of its client base. The solution not only reduces unnecessary paper and reduces storage costs, but also makes the documents more accessible to all users of the MAUI system. Covenant Trust Company's Vice President and Chief Operating Officer, Eric Johnson, stated that, "Having documents a click away within our trust system is obviously efficient, provides ease of use, and, furthers our goal to become a paperless organization." When asked about the ease of use, Mr. Johnson replied, "You would think that 140,000 documents in the system would be overwhelming, but navigation is easy."

About INFOVISA

INFOVISA is an independent provider of data processing systems and related services for bank trust departments, independent trust companies, not-for-profit foundations, colleges and universities. INFOVISA was founded in 1992 and has long been a pioneer in the wealth management arena. INFOVISA was the first company to develop a complete Windows based, real-time trust accounting system - MAUI™. MAUI is made up of individual modules providing the user with a customized system to meet their needs. Through a combination of proprietary software coupled with Application Service Provider (ASP) services, clients of INFOVISA are provided with a robust and comprehensive technology solution. Never before has the wealth management industry had such leading edge technology at their fingertips. For more information, please contact INFOVISA at (704) 892 -3270 or visit us on the web at www.infovisa.com.