

Portal for Document Management and Workflow

OVERVIEW

Portal for document management and workflow.

ABOUT OUR CLIENT



Worldsource Financial Management is a division of Worldsource Wealth Management Inc., a fully integrated wealth management company that is focused on building financial prosperity. Worldsource Financial Management supports the innovative and entrepreneurial approach that independent advisors bring to their professional practices. Over 600 independent mutual fund advisors have partnered with Worldsource Financial Management, serving the financial planning needs of over 100,000 Canadian investor clients.

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Hundreds of Documents are Received Daily



A Variety of Document Types, Input Sources and Formats need to be Managed Quickly

The Challenge

Each day, Worldsource Financial are required to manage hundreds of documents that come in from their advisor community and are required to quickly and accurately flow through to their internal dealer administration systems and then maintained for long term retention and retrieval. Creating an elegant solution to managing not only the document flow but also the variety of document types, input sources and formats was a challenge. Worldsource worked with Octacom to create an integrated solution that has allowed them to automate the process, ensure accuracy and quality of the documents and more recently, provide a self-service portal that has significantly lessened the burden of exception handling for their internal admin staff.



CUSTOM DOCUMENT
MANAGEMENT PORTAL

The Solution

Octacom created a custom document management portal and workflow solution for the submission, conversion, verification and processing of their client account documents. Documents submitted through the secure portal can be tracked and audited throughout the entire process. Worldsource Financial advisors love the convenience and ease of use. From their desktop, tablet or any mobile device, the drag and drop feature allows them to submit documents and then track their submission status. At head office, Worldsource admin staff has 100% visibility to the entire process and the ability to quickly and easily manage exceptions.

The Results

For the Worldsource administrative group, the Octacom solution enabled seamless management of exception processes for any submitted documents that do not successfully pass the required verification stage.



More Case Studies

Learn more about how our solutions and services have helped our clients.

LAFARGE

Improved processes related to managing over a half million delivery tickets annually.

HAMILTON HEALTH SCIENCES

Scanned and indexed over 86 million patient records for seven Hamilton hospitals.

SALVATION ARMY

Integrated their ERP solution to centralize and automate invoice processing.

VOTORANTIM CIMENTOS

Improved processes related to storing and reproducing shipping waybills and tickets.

ONTARIO POWER GENERATION

Created a custom Accounts Payable Automation solution to manage over 110,000 invoices.

ESTÉE LAUDER COSMETICS

Eliminated manual process for retrieving, handling, filing and distribution of HR records.

YORK REGIONAL POLICE

6,000 employee files effectively converted into secure digital images, indexed and uploaded.

AIR CANADA

Turn-key solution handles over 500,000 air waybills and 1.5 millions documents annually.

VITALAIRE

Eliminated manual processes for tracking, filing and retrieval of paper-based POD documents.

ROOTS OF EMPATHY

Survey capture and processing services for over 9,000 parents responding to the survey.

MIDWIVES' CLINIC OF EAST YORK-DON MILLS

Provided document scanning services and secure cloud hosting of digital Patient Records.

HEAD OFFICE

45 Staples Avenue, Suite 120
Richmond Hill, ON L4B 4W6

CONTACT US

T 905 737 0700
F 905 737 7185

info@octacom.ca
www.octacom.ca

ABOUT OCTACOM

Octacom is an enterprise software and services company focused on document and data management solutions. Founded in 1976 and headquartered in Richmond Hill, Ontario, Octacom specializes in document management and workflow automation software as well as document imaging services, and leverages its proprietary Odiss™ Document Management Software to provide a robust, secure and cost effective solution to clients globally across a wide range of industries.