



ActiveDocs Case Study:
Compeer Financial

A modern, resilient document
automation software replaces an
outdated Microsoft InfoPath
based solution



DOCUMENT AUTOMATION SOFTWARE





“ActiveDocs has streamlined our document design process. Changes to our documents previously required the help of a developer but the designer tools allow us to make updates on our own resulting in faster turnarounds and fewer steps than we could before.”

- Maggie, Compeer form designer

CUSTOMER BACKGROUND

Compeer Financial is a member-owned Farm Credit cooperative serving and supporting agriculture and rural America. It operates in 144 counties in Illinois, Minnesota and Wisconsin, has 1,300 team members and serves approximately 73,000 clients. Compeer Financial has \$27.3 billion in total assets and is one of the largest organizations in the Farm Credit System.

BUSINESS CHALLENGES

Compeer had built a document generation system based on Microsoft InfoPath over a decade ago. With the extended support of InfoPath being phased out, a new solution, matching the state of the technology today, needed to be put in place. While looking for a direct replacement, Compeer realized that a number of business challenges can be taken care of with a modern document automation solution. Flexibility when making changes to document templates, ease of maintenance and integration with nCino and Salesforce, which work together as Compeer's line of business application, were high on the list of requirements.

With InfoPath, template designers were constrained by the forms-based architecture, which necessitated building of documents as a series of pages with limited or no capability to flow text across – for example, when a section was removed from one page, it was virtually impossible to make the text from the next page, and all subsequent pages, re-flow appropriately. Other pain points included the lack of capabilities for content reuse, the lack of centralized management of formatting and styles, and the need to use a table-based document layout. InfoPath's limitations, rather than business requirements dictated how templates were designed and client-facing documents had to look.

The desktop-centric architecture of InfoPath didn't allow for centralized control and made integration with any data sources unreliable and hard to maintain.

With InfoPath, it was also impossible to build a highly resilient and secure solution, as its core components had to be deployed on each of the end users' desktop computer.

AT A GLANCE

- Over 140 templates have been migrated from the legacy Microsoft InfoPath solution.
- Integrated with nCino and Salesforce for automated generation of over 100,000 business-critical documents per year.
- Deployed in highly resilient and secure configuration to help ensure business operations continuity under adverse and disaster-level conditions.

“Two of our favorite features within the designer toolset are Snippets and the Data ‘Relationship’ Feature. Snippets allow for ease in building content that is shared across multiple forms; the time savings is substantial and they enforce consistency across forms. The Data ‘Relationship’ Feature provides ease and speed in identifying which forms utilize specific data views and fields, making data mapping modifications more efficient.”

- Susie,
Compeer form designer

THE SOLUTION

Compeer Financial decided to implement a modern document automation solution to replace the aging Microsoft InfoPath-based system. After a careful selection process and running a proof of concept project, Compeer Financial chose ActiveDocs for all its document generation needs.

With ActiveDocs, Compeer Financial now has the ability to maintain content centrally. When a piece of content is shared by multiple templates, it can be edited in one place and updated everywhere. This applies to text, graphics, and combinations of both. ActiveDocs also enables Compeer's reusable content to use the same automation features as the core templates. This can mean that, for example, the terms and conditions content will always have the correct wording, adjusting itself to match the state jurisdiction of the document the T&Cs appear in.

Template designers now edit their templates in the familiar environment of Microsoft Word and can leverage all of its formatting and styling capabilities.

Through its open API, ActiveDocs makes it possible to build the overall solution using the best practice of enterprise system architecture with seamless integration points with nCino and Salesforce for sourcing of data for each document and for the upload of documents back into Salesforce, filing them automatically under the case they belong to.

ActiveDocs enabled deployment of the solution in a highly redundant, geographically spread configuration for both the application and database components.

PROBLEMS SOLVED

The deployment of ActiveDocs has delivered material results in a number of areas.

Thanks to the centralized management of content and automation components, and the no-code, Microsoft Word based template design, template designers can build new templates and make changes to existing ones at the speed that is orders of magnitude faster, responding to changing market and business needs quicker. This

applies to changes to content, as well as changes to fonts, styles, template layout and any graphical elements.

Through the use of ActiveDocs' open API, Compeer Financial has achieved robust and easy to maintain integration with nCino and Salesforce. This means that if, for example, a new data field is added in nCino, no or minimal changes are required to the integration layer. ActiveDocs template designers can simply start using the field that has been added in the templates. This means that even significant changes to business requirements can be accommodated quickly, with no or minimal changes to the integration code.

With the deployment of ActiveDocs, Compeer's document generation system has achieved the IT security and resilience standards required for its business-critical level systems. This mitigates the impact of any localized natural disaster or cyberattack, with the aim to achieve zero or minimal disruption to its business as usual operations.

COMPLETE CONFIDENCE

ActiveDocs helped Compeer to be fully confident in their choice of the document automation software by enabling them to test ActiveDocs in their environment as part of the proof of concept project prior to committing to the product selection.

Through the centralized management of content and templates, Compeer can now be confident that their clients will receive contracts and other documents that are based on the latest and accurate templates and data, every time.

Compeer's template designers are now confident in their ability to quickly respond to any change requests and can create new automated documents in a fraction of the time required previously.

Compeer's Business Technology team is confident in the robust integration that connects ActiveDocs with nCino and Salesforce, and it requires minimal maintenance.

With the resilient deployment configuration, the entire business is confident that their operations can rely on ActiveDocs automated document generation under a range of adverse events and conditions.

ABOUT ACTIVEDOCS

An industry leader for over 25 years, ActiveDocs develops document automation software, making it easy for large organizations to design templates and produce the documents they need with the greatest speed, success, and minimum risk.

It's the confident choice of large companies for document automation success.

www.activedocs.com

"ActiveDocs gave us the flexibility we needed to accelerate our digital transformation and evolve our business models. Because ActiveDocs is loosely coupled to (but easy to integrate with) our loan origination systems, we can use the same document generation engine for multiple loan origination systems and business processes. This allows us to implement loan origination systems for different lines of business at much lower cost. It also allows us to adopt document automation for internal uses (such as efficiently generating NDA's) which never would have justified a full technology deployment project on their own.

In addition, as compared with other solutions which we considered, ActiveDocs makes it much easier to customize our loan agreements and other form contracts, allowing us to quickly and efficiently make changes to our contracts and meet the evolving needs of the clients which we serve."

- Greg,
Compeer attorney

