



## How one bank optimized loan operations with the experts at TAB

TAB helped one regional bank transition from a legacy document tracking system to TAB FusionRMS which manages their loan operations far more effectively.

TAB FusionRMS provided this bank a complete records management solution that is user friendly and easily accessible.

FusionRMS manages their records through one single application that will significantly reduce user clicks and create a simple searching index of all the existing loans. TAB's professional services team worked with the Bank to import the existing database as well as design and implement a new barcode tracking system for locating and tracking their critical records.

The transition to FusionRMS also allowed the bank to access their records remotely via a web browser. TAB's team provided a series of administrative and core user training sessions to ensure users have a complete understanding of the new system.



### About TAB

TAB helps financial institutions save money, improve operational efficiency and reduce risk through a combination of consulting, professional services, filing and storage products, and TAB FusionRMS, our records and information management software solution.

In our 70-year history, TAB has had the privilege of working with hundreds of banks and financial institutions, helping them manage records and optimize their document-based business processes. Reach out today to learn how TAB can help your organization optimize its loan operations.

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