

Webiplex – DocuPeak Document Management

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DocuPeak™ Business Process Automation Solution Delivers Increased Capacity and Cost Savings for Title Solutions, Inc.



Title Solution, Inc.
Delivering Service, Reliability
and Excellence since 2003

Challenge: Need for Increased Capacity and Cost Savings

Title Solutions, Inc. originally a West Coast abstracting company has grown into a nationwide source of accurate, timely title information for financial institutions and real estate professionals.

TSI's President Mike Skene and his management staff understood the benefits of becoming paperless early on and had adopted scanning of the title abstracts and reports. In 2009 Mike saw an opportunity to grow his company, as demand for quality affordable title products was on an upswing. However, Mike did not want to increase head count, as the economic climate was uncertain. The alternative was to look at streamlining operations. The scanning system TSI had in place did not provide any automation capability and with 800 orders per month and growing, finding documents and keeping track of orders was becoming increasingly difficult.

With a vision to expand system functionality by streamlining both incoming order processing, as well automating the way orders were farmed out to the appropriate abstractor, Mike and his management team began searching for a solution.

Solution: DocuPeak™ EDMS/BPM SaaS Platform

After evaluating a number of electronic document management systems that offered advanced functionality, the Webiplex DocuPeak™ solution was selected as the front runner. Mike recalls the key factors in selecting the solution as follows:

- **Scalability:** We wanted a SaaS solution that scaled with our business. DocuPeak is a flexible document-centric business process management application, built on the latest Microsoft .NET standards and it is hosted at a SAS 70 Type II certified facility.
- **Rapid Deployment:** The system is designed for rapid deployment. When we saw how DocuPeak Document Views can be customized for intuitive navigation to meet the needs of our business process for viewing and workflow interaction, we knew our users could quickly learn to use the system.

Customer Profile

Title Solutions, Inc. was founded in 2003 by Title Insurance Executives to provide fast, accurate and reasonably priced title products to key lenders in the real estate industry. TSI's mission is to provide the highest quality, most accurate reports to their clients in the most efficient manner for a reasonable fee.

“Our order processing capacity has doubled and order turnaround times have been cut in half – all of this has been achieved without increasing head count”

**-Mike Skene
President
Title Solutions, Inc.**

- **Execution:** We really liked the project management staff at WebiPLEX. They were knowledgeable about their product, but more importantly they understood business process and spent the necessary time to understand our unique needs. We had a good idea of the results we wanted to achieve, but it took a seasoned project management team to make it a reality for us.
- **ROI:** When we analyzed the total cost of ownership, the ROI on the DocuPeak SaaS solution made perfect sense.

As orders come in via e-mail from the financial institutions that TSI works with, the data is automatically imported into TSI's DocuPeak SaaS repository, and the order information is recognized by using DocuPeak Content Reader technology – each order may contain as many as 100 different file numbers that represent properties in multiple counties in various states.

DocuPeak mines the data and matches each file number with the appropriate abstractor that works within the county that the property is located in. An order is automatically generated and e-mailed to the matched abstractor. The abstractor database is managed within DocuPeak and is kept up to date by TSI personnel as new states are added to their service area and as abstractors are added or deleted from the pool. Each abstractor is notified via e-mail that an order is placed in their queue and they have security based access to the system, so they can login and access only the orders that pertain to them.

Once the abstractor completes the title report and submits it back to TSI, an authorized TSI representative reviews and uploads the report to the completed reports section of the repository. The reports are then available to be delivered to clients via, electronic fax, e-mail, or print. All the steps within the workflow are tracked in the system audit trail and reports can be generated to monitor the production queue at any time.

Result: Increased Capacity and Lower Processing Costs

Today TSI is able to fulfill more than 2,000 orders per month with the help of an automated process that was created by implementing the DocuPeak Business Process Management solution. The functionality of DocuPeak allows TSI to configure the document management and workflow processes in a manner that meets their business requirements and grows with their needs.

The monthly cost of the SaaS DocuPeak platform is a fraction of the additional personnel needed to fulfill the increased volume of incoming orders in the old system. Title Solutions, Inc. selected the WebiPLEX SaaS solution and was able to implement the initial phase of their system in less than six weeks with no capital outlay for hardware or software.

WebiPLEX, 5001 Birch Street, Newport Beach, CA 92660

For more information about WebiPLEX products and services, call (949) 861-4387.

To access information using the Web, please go to: <http://www.webiPLEX.com>

Title Solution, Inc. Project Objectives

- ❖ **Web-Based**
Create a fully indexed web based document repository for archive and retrieval of pertinent documents by authorized personnel based on:
 - File number
 - Full-text
- ❖ **Automated Capture**
Automate incoming Title order capture from key customers.
- ❖ **Automated Workflow**
Create a formal workflow process to auto assign cases to the designated abstractor based on geography.
- ❖ **Audit Trail**
Implement a system that provides an audit trail and stores processed orders and reports, including images of related correspondence and documentation.

“The use of DocuPeak Business Process Management solution allows us to very quickly capture incoming customer orders and automatically assign work to the designated abstractor in the area.”

**-Amber Hernandez
Production Manager
Title Solutions, Inc.**