

With Revolve you'll save thousands and complete forms within minutes, rather than hours.

Overview

Forms are used across all businesses around the world. With over 75% of these forms still paper based, huge opportunities for efficiencies exist within businesses.

- Auto fill, share and store all of your forms in one secure online location.
- Complete bulk application forms quickly. This could be a 'one off' limited offering to all of your high net worth clients requiring immediate response.
- Create error-free compliant forms with a minimum of fuss and without compromising any accuracy of data.

Key Benefits

Maximise efficiencies and save money

- Reduce labour costs in manually processing forms *"We were able to trim our administration overhead by thousands annually"*
- Pay-as-you-go for system usage with no up-front software costs *"We decreased our document archiving and storage costs significantly"*

Maximise profits and improve customer communication

- Issue accurate forms in seconds, improving the customer experience with accurate communications *"Get to market with critical documents and contracts up to 85% faster"*
- Save significant time modifying and maintaining multiple versions of forms *"Revolve cut contract approval times from days to minutes"*

Enhance productivity and compliance

- Complete forms within hours rather than weeks *"Revolve effectively reduced document development times by 67%"*
- Eliminate incorrect use of outdated printed materials through a centralised forms library *"Revolve saved us thousands of dollars in printing and postage costs"*

How it works

Revolve connects to your Client Information System (like Xplan or COIN) to allow you to create any form in one click. Details such as names, address, contact details, bank details and any other client information in your system, can be put onto any form.

We handle the setup of the forms so you have the right form with the right data every time.

Once completed, the forms can be easily shared with clients and then centrally stored within the system for easy retrieval.

Affirm integrates with online AML checking to ensure 'KYC' compliance in one click.

Services

We partner with you to ensure that the library of forms you use are managed within the system; configured in any way that you want to use them.

Our unique technology allows us to get new forms online within hours, allowing them to be ready to use by your staff or customers quickly.

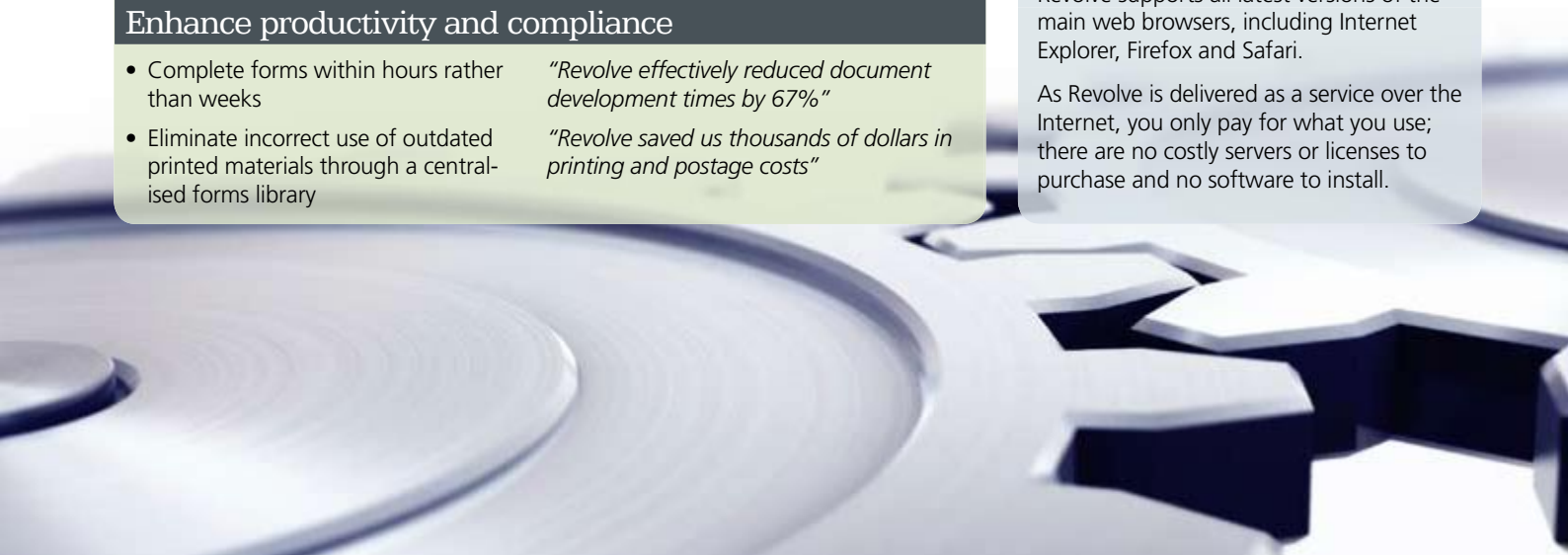
Once implemented, we provide comprehensive training services. We are also available to consult with your business to potentially reengineer your forms business processes to get the most value from our technology and optimise your existing business processes.

Systems requirements

As Revolve is a web based system, the only software that you need is a web browser and a copy of the free Adobe Reader for viewing PDF files.

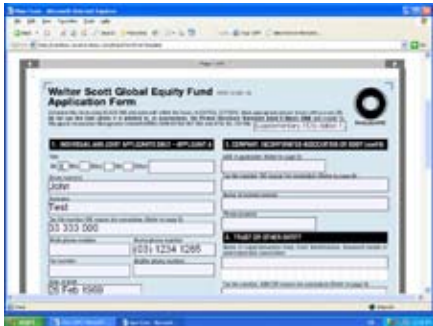
Revolve supports all latest versions of the main web browsers, including Internet Explorer, Firefox and Safari.

As Revolve is delivered as a service over the Internet, you only pay for what you use; there are no costly servers or licenses to purchase and no software to install.

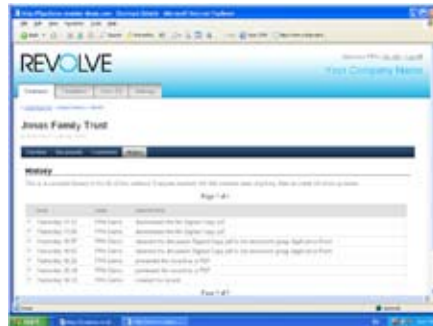




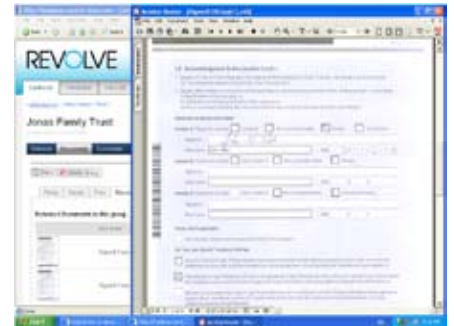
Work efficiently...



Auto fill any form. Never retype or hand-write information that you have in your client management system



Track form History. You will always know what is happening with any form



Store signed copies without filing. Fax or scan any document into Revolve and it will recognise and automatically file it in the right place.

Features

- **Form creator** — create pre-populated forms, product disclosure statements or new blank forms
- **Automate forms using PDF** — PDF documents can be used as the basis for forms templates as a rich interactive form online
- **Searching and retrieving** — search and retrieve all forms stored online quickly
- **7 year storage** — automatic filing of all scanned and signed forms online to comply with auditing requirements
- **Document History** — full history and audit trail of all changes and edits made to forms
- **Document Sharing** — allow multiple parties to review, edit and approve forms
- **Fax, email and scanning** — ability to fax, email and scan all forms into the system
- **Version control** — when a change is made to a field within a form, Revolve automatically updates every occurrence of that field in all document groups in which it appears
- **Systems integration** — integration to XPlan and COIN and most systems with an open API
- **Custom branding** — Revolve can look like an internal system to align with any corporate branding requirements

CASE STUDY



Pitcher Partners investment advisory division were finding it was sometimes taking up to half an hour a day to complete an individual product disclosure statement or application form on behalf of their wealth management clients.

When multiple investments were being developed for their clients, they often had to duplicate personal information many times onto application forms, which could sometimes result in errors in the double handling process. If there were inaccuracies in filling in the form, the application form may have needed to be manually redone, wasting valuable financial advisors time.

Revolve has saved their administration staff time by auto filling in forms online, reduced error rates in completing application forms, and enabled all staff to access a centralised repository of standardised forms.

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www.affirmsoftware.com.au

If you would like further information about any of our products, services or other case studies, please contact us on any of the information below.