

DocStudio for Banks & Credit Unions

Automate document workflows, e-signature, and approvals across onboarding, lending, and compliance.



Benefits for Banks & Credit Unions



Reduced manual work & costs



Faster onboarding and loan processing



Improved customer experience



Seamless system integrations



Better compliance & audit readiness

DocStudio is a document automation platform designed for financial institutions. It centralizes document creation, workflows, approvals, and signing in one secure system, and integrates with core banking, CRM, and lending platforms to reduce manual work, support compliance and audit readiness.

Integration Options



Core banking systems



CRM systems



LOS/LMS



APIs for custom integrations

Reduce time-to-decision for loans and accounts by automating document collection, workflows, and signing.

Eliminate manual data entry by automatically populating documents with data from your core banking system.

Platform Capabilities



Smart Templates & E-Forms



Document storage and secure workspaces



Compliant e-Signature



Multi-step approval workflows

Use Cases Relevant to Banks & Credit Unions

Internal and external document management

Paperless branch operations

Customer onboarding

Loan workflows & applications

Compliance documents

Ready to transform manual work into automated workflows?