



Capsilon Professional Services

Maximize your Capsilon DocVelocity Investment

The Capsilon Professional Services organization is comprised of five teams that work together seamlessly to provide world-class, value-added services:

- > Consulting Services
- > Customer Success
- > Product Support
- > Data Services
- > Quality and Compliance Services

Capsilon Professional Services is responsible for implementing Capsilon DocVelocity to meet each customer’s unique business goals, and for ensuring that every customer realizes the full potential of DocVelocity for optimal business impact.

From evaluating your current loan processes and workflows, to configuring and integrating Capsilon DocVelocity specifically for your environment, to delivering product training to your staff, the Capsilon Professional Services team is committed to helping you maximize the return on your technology investment.

The Capsilon Professional Services organization is comprised of five teams that work together seamlessly to provide world-class, value-added services to mortgage lenders, investors, and servicers throughout the United States: Consulting Services, Customer Success, Product Support, Data Services, and Quality and Compliance Services.

Consulting Services

Capsilon DocVelocity Deployment and Implementation Services.



For every customer deployment, the Capsilon Consulting Services team adheres to a strict, proven methodology that includes on-site discovery and requirements documentation, collaborative solution design, extensive testing,

end user and site administrator training, change management, and post-implementation guidance.

Every new Capsilon DocVelocity customer is assigned a dedicated Implementation Manager with deep product knowledge who works exclusively with you and your team to ensure the success of your DocVelocity implementation and rollout.

Applying best-practices and disciplined project management skills, your Implementation Manager configures DocVelocity to streamline your loan processing operations, complete transactions in less time and at a lower cost, all while ensuring compliance with ever-evolving industry regulations.

Capsilon DocVelocity Deployment and Implementation Services consultants hold a number of certifications including IT Infrastructure Library (ITIL), Project Management Professional (PMP), and Association for Information and Image Management (AIIM) Electronic Records Management.

Capsilon DocVelocity Systems Integration and Tools Development Services.

Many organizations have specialized business needs that may require custom services including enhanced reporting, custom data extraction, and/or integration with existing software applications such as loan origination systems (LOS). These specialized needs typically require the development of product extensions, tools, or other product customizations.

To meet these needs, Capsilon Consulting Services provides systems integration and software tools development services for building software integrations, utilities, and tools that interface seamlessly with DocVelocity. Our senior consultants work with you and your business stakeholders to design and develop software utilities that maximize the value of your investment in DocVelocity.

Capsilon DocVelocity Onsite and Online Training Services.

From introductory end-user training to advanced software integration workshops, Capsilon offers a full range of training courses to meet the needs of everyone in your organization who interacts with DocVelocity.

Whether you are looking to integrate DocVelocity with existing applications or empower your in-house support staff to provide technical assistance to your loan processing team, the Capsilon training team can help. For maximum flexibility, courses are available in an on-site classroom format or as interactive web-based classes, and each course is tailored to fit the unique needs of your business.

Below is a brief sample of the classes available:

Course Name and Description	Target Audience	Duration	Delivery Options
DocVelocity Administrator Training. New DocVelocity Site Administrators learn how to set up user accounts, configure site settings, and manage security via live instruction and hands-on exercises.	Site Administrators	One Half-Day	On-site or via web
Help Desk Training for DocVelocity Customers. Through a combination of live instruction and hands-on exercises, help desk staff members learn how handle front-line support calls from DocVelocity users.	IT Support Staff	One Day	On-site or via web
DocVelocity Orchestration API Integration Workshop. Under the tutelage of a senior Capsilon software developer, students learn how to use the DocVelocity Orchestration API to build integrations and automations into other systems such as Loan origination Systems (LOS).	Developers	Two Days	On-site
DocVelocity "Train the Trainer" Training. Learn how to become a Capsilon-certified DocVelocity trainer in just 3 days by completing this "Train the Trainer" class.	Instructors	Three Days	On-site or at Capsilon offices

For a complete list of available courses, please contact your Account Manager or email training@capsilon.com.

Customer Success



Your Capsilon Customer Success Manager is your dedicated partner who serves as a single point of contact for anything you need. From questions about adding services to your subscription, to scheduling product training for new employees, to understanding billing options, the Customer Success Manager is your internal advocate who is committed to helping you get the most out of your DocVelocity solution.

Acting on your behalf, your Customer Success Manager collaborates with the appropriate people and organizes the required resources within Capsilon to address your needs quickly and comprehensively.

In addition to your Customer Success Manager, Technical Account Managers (TAMs) are available to work with your organization to gain a deep understanding of your DocVelocity implementation and other business systems. Depending on your needs, a TAM can be assigned to proactively work with you to identify new ways to leverage your investment in DocVelocity more effectively through process improvements and system integrations.

Product Support



In order to provide the highest quality, most responsive product support services to our customers, Capsilon made a strategic decision to base its entire product support staff in the United States. This U.S.-based team of Capsilon support professionals, with deep Capsilon DocVelocity product knowledge and mortgage industry experience, is organized to deliver world-class support to the mortgage lenders, investors, and servicers throughout the United States who depend on DocVelocity to automate and streamline their loan processes and workflows, and enable them to comply with industry regulations.

Whenever you have a question or issue, you can submit a support case through our self-service Support Portal, by calling our toll-free phone number, or sending an email. To initiate a live consultation with a Capsilon support analyst, dial 1-877-362-8356, option 2. Our support team is available to you by phone from 8:00 a.m. to 8:00 p.m. Eastern Standard Time, Monday through Friday. For critical product issues, after-hours support is also available.

Data Services



The Capsilon Data Services team configures DocVelocity to recognize the loan documents that are important to your business and to extract the loan data to meet your business needs. DocVelocity's patented Automated Document Recognition (ADR) technology automatically recognizes more than 250 common industry document types. Using the DocVelocity Automated Data Extraction (ADE) technology, DocVelocity can be configured to identify and extract critical loan data from these recognized documents, then transform it into MISMO-compliant data points (MISMO 3.3 standard) for consumption by automation engines and other uses. This automatic identification, naming, and indexing of documents eliminates time-consuming and error-prone manual indexing.

The Capsilon Data Services team constantly monitors and maintains a catalog of hundreds of common industry document types, including variations, called a “learnset,” and associated data, called a “data set” and updates the catalog accordingly to ensure that the ADR and ADE capabilities of DocVelocity set the standard for speed and accuracy. If you use custom document types as part of your loan process, and data that you need to extract from those documents, the Data Services team works closely with you to create and maintain custom ADR learnsets and ADE datasets tailored to your needs.

Quality and Compliance Services



The Capsilon Quality and Compliance Services team offers a full range of services designed to ensure the integrity and accuracy of your mortgage loan data and to enhance the overall quality of your loan packages. From due diligence and quality control of loan documents, to folder indexing and data validation, the Quality and Compliance Services team works to maximize the quality and potential of the documents and data managed with DocVelocity. And, if you need to bulk import loan files into DocVelocity, or perform backfile conversions from legacy systems, the Quality and Compliance Services team is ready to help you accomplish your goals quickly and cost-effectively.

The Quality and Compliance Services team provides enhanced decision services, leveraging DocVelocity technology to process your company’s business rules for accepting or rejecting loans, quality control checks, and ensuring compliance with regulatory requirements, including the new TRID rule. The team can also provide straight-through processing (STP) and workflow automation for any number of functions, including Pre-Funding QC, Post-Closing QC, and portfolio investment analysis for correspondent lenders.

About Capsilon Corporation

Capsilon provides comprehensive cloud-based document and data management solutions that enable mortgage lenders and investors to increase productivity and lower costs, while ensuring compliance. The company’s flagship product, Capsilon DocVelocity®, is a document imaging and data capture platform built specifically to address the needs of large mortgage lenders. Headquartered in San Francisco, Capsilon serves many of the mortgage industry’s most innovative lenders, including two of the 10 largest residential mortgage lenders in the United States. For more information, visit www.capsilon.com.

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