Users pull in all of the documentation related to a case in a drag-and-drop interface or via an API trigger from their CRM.

Once the upload has been triggered, it generates verified customer reports.

This is a single permissioned view of the customer that can be relied on by brokers, networks, and lenders.

We're able to go through all of the main sections within a report that you'd need, and we've been very clear on where the sourcing has come from.

We're able to see things such as income and employment, categorise cash flow and outgoings.

We can also see the commitments and pull the information from property and mortgage.

This allows us to have the auto checks taking place and also have the data entities and audit trail.

It can be exported to PDF, downloaded as JSON, used in an evidence pack, or linked as part of other user journeys. You can then go back and use the verification panel to see client documentation.