

FRAMESOFT DOCUMENT ASSEMBLY



Document Component Configuration & Document Generation

Framesoft Document Assembly (FDA) is nothing short of a revolutionary tool that is transforming the way organizations create and manage documents.

FDA is a game-changing innovation of the document automation strategy via combining automation, data integration, pre-designed template clauses and rules to generate new, tailor-made documents with astonishing speed & accuracy. But the thrills do not end with the document generation. Via workflow automation documents generated are provided for review, approval, e-signatures, distribution making the process efficient from start to finish.

FDA Components

1. Clause Library

These are not just any clauses; they are often intricate blueprints designed to ensure that each document created conforms to specific stylistic guidelines, legal requirements, and branding elements. Clauses feature placeholders for variable content, making them dynamic and adaptable.

Furthermore, each clause update will create a new version. All former clause versions are still available for audit purposes.

2. Document Template Assembly

In FDA clauses can be assembled to new or existing sections, sub-documents, and document templates on the fly. Upon its creation or update any element will be part of an approval process before being released for automated generation.

3. Database Integration

FDA can pull information from existing databases to populate fields and apply conditional logic.

4. Conditional Logic

Set of rules and guidelines that dictate how data is populated into the clause (e.g., certain paragraphs or clauses may only appear under specific conditions)

5. Document Generation

Document Templates designed in FDA can be directly used for a document generation as follows:

- Generation integrated in Document Request Workflow
- (Re-) Generation of a manually selected document
- Document generation triggered via API call
- Further document generation actions defined

The corresponding FDA document templates are selected automatically based on a mapping applied.

6. Post Generation Editing

Upon generation a document is presented via editor for post editing. Any update of a clause will automatically create a new "revision number" which will be tracked in addition to the template clause version. This allows tracking all

- Clause versions used in the document generation
- Clauses edited upon generation

7. Version Control & Lifecycle Management

Features that track changes, maintain multiple versions, and manage the lifecycle of clauses, templates and documents are included such as:

- View all clause & template / document version
- Generated document search
- Clause (version) usage search
- What if analysis

8. Workflow Automation

Advanced workflow functionalities that route the generated document for review, approval, e-signature, and distribution.

9. Output Formats

Once assembled, documents can be produced in various formats such as PDF, MS Word, or HTML.

10. Document Negotiation

Conduct reviews & negotiations based on generated documents directly via Framesoft Online

Negotiation (FON) for:

- Document negotiation with multiple parties
- Simultaneous document revisions by the different parties
- Merge Handling - updates directly pushed into a document
- Automated document generation triggered by updates
- Messaging component for direct communication (chat)

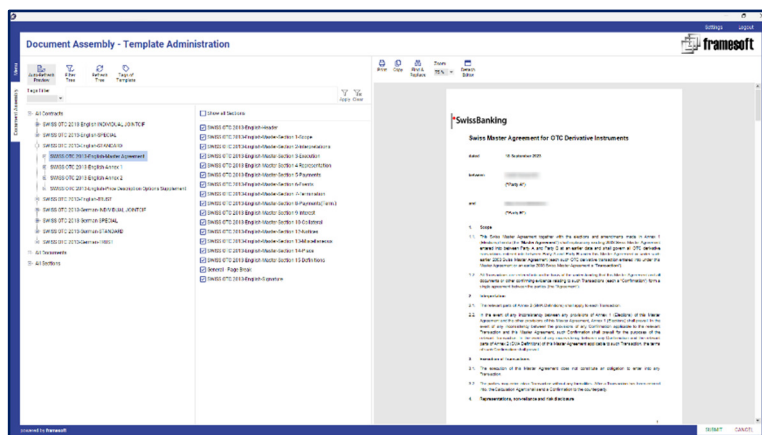
11. Document Archiving

All generated & related documents from drafts to execution copies shall be stored in a document archive system such as Framesoft Document Management (FDM).

12. Security & Compliance

Security measures such as encryption, access controls, and audit trails to ensure that sensitive data is protected and compliance with relevant regulations is assured are applied.

Get in contact with us for a FDA demonstration at contact@framesoft.com or visit www.framesoft.com.



COMPANY PROFILE

Framesoft AG Software Applications



Framesoft offers the following fully integrated solution portfolio

- **Framesoft Contract Repository (FCR)**
- **Framesoft Document Management (FDM)**
- **Framesoft Structured Products (FSP)**
- **Framesoft Fee Management (FFM)**
- **Framesoft PRIIPS KID Generator (FPG)**
- **Framesoft OTC Platform (FOP)**
- **Framesoft Confirmation Generator (FCG)**
- **Framesoft Matter Management (FLM)**
- **Framesoft Repo & Securities Lending (FRS)**
- **Framesoft Document Generator (FDG)**
- **Framesoft Resource Management (FRM)**
- **Framesoft Secure Online Data Room (FDM Platform)**
- **Framesoft Online Negotiation (FON)**
- **Framesoft Protocol Platform (FPP)**
- **Framesoft Data Insight (FDI)**
- **Framesoft Document Intelligence (FAI)**

Framesoft's product & services portfolio is strongly focusing on the financial services industry and covers the complete life cycle of a software solution, ranging from supporting the early conceptual application design stages, to the delivery and integration of our applications into the client's infrastructure.

Framesoft is also offering application support including

- 1st / 2nd / 3rd level production support
- business and
- user support.

Additionally, Framesoft offers to run its applications as ASP service based on its advanced cloud infrastructure in Switzerland.

Framesoft was founded in 1996 with the goal to create technology solutions for innovative, fast-growing areas within the financial services industry. Framesoft solutions are built on a foundation of core modules (Frameworks) enabling rapid application development mainly based on configuration to meet the ever-evolving needs in these markets.

Framesoft's mission is to maximize the benefits of external technology provision for our clients, by applying the Framesoft Framework strategy.

Framesoft's unique selling proposition is the support of complete value chains including areas typically conducted by means of unstructured tools such as paper, e-Mail, facsimile or telephone.

Customers using Framesoft solutions

- achieve a high degree of **Straight through Processing (STP)**,
- avoid typical **operational risks** associated with manual interventions,
- gain **control** over complex business processes,
- increase Business **Process Efficiency & Transparency**,
- cut **Time-to-Market**,
- reduce **Legal & Credit Risk**

Framesoft's headquarter is located in Zug, Switzerland and Framesoft runs subsidiaries with offices in

- Europe
 - ✓ Switzerland
 - ✓ Germany
 - ✓ United Kingdom
- North America
- Asia

Get in contact with us at contact@framesoft.com or visit our website at www.framesoft.com.