Streamlining Case Management in Salesforce with KTA

Current State

- Salesforce customers that use Case Management, receive completed forms that are faxed, mailed, or emailed but need to manually keystroke the information back into Salesforce.

Issue

- Delays in processing
- Dependency on manual and outdated processing
- A slow process prone to errors
- Forms can be lost in route and unsecure

Impact

- Reduced request processing time
- Improved accuracy
- Reduced costs
- Increased productivity and efficiency

Solution

Form or Document is sent or uploaded to **Kofax TotalAgility**.

Kofax TotalAgility ingests unstructured data, with integrated "human in the loop" functionality to support accuracy when needed.

Structured data and case form attachment is sent by **Kofax TotalAgility** via connector.

Case record is created and updated in **Salesforce**. Form attachment is associated to Case.

KOFAX