



CASE STUDY

A leading US mortgage financing company modernises its document management with Generis' CARA platform

One of North America's premier mortgage financing companies sought to replace its legacy document management system with a modern, secure, and highly configurable cloud solution. The shift was driven by rising costs and operational inefficiencies that were limiting the organisation's ability to adapt and scale.



Industry

Finance



Users

2,000



Location

USA



Use cases

Legacy
Modernisation

The Issues



Secure, Cloud-Native Architecture at Scale

The organization needed a cloud-native, audit-ready system capable of securely managing business-critical content across multiple domains, including customer documentation and agreements, legal records, retention policies, and loan applications. The challenge was achieving this depth while maintaining an intuitive user experience that would drive adoption.



Vendor Dependence and Rising Costs

The previous platform made even minor configuration changes difficult and expensive. Any adjustment to business processes required vendor involvement and lengthy, costly implementations. This forced the organisation into a difficult choice: optimise operations and sacrifice budget, or maintain budget and forgo optimisation. In a regulated industry where agility is critical, neither option was acceptable.

The Goal

Deploy a responsive, highly configurable platform that would empower internal teams to manage their own system configurations without vendor dependence. The solution needed to reduce implementation costs, improve user adoption, and maintain the compliance, access controls, and audit capabilities essential to operating in financial services.

The solution

Generis deployed the CARA platform to consolidate fragmented document repositories from the legacy system into one unified, secure workspace. Individual workspace configurations and role-based security controls gave administrators and users the flexibility and control they needed to manage their specific domains and workflows.

The platform's built-in integration capabilities seamlessly connected to multiple applications supporting the organisation's processes. CARA's native compliance, access controls, and audit trails ensure that highly confidential consumer data, financial records, and personnel information remain protected and audit-ready at all times.

CARA: One source of truth for financial services operations.

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