

INTRODUCING TAP 3.5 for Lockbox

Treasury Access Professional

Treasury Access Professional (TAP) version 3.5 is a web portal that provides Third-Party Service Providers, Bank Clients and their Lockbox Customers with secure online access to images, documents, reports and more.

TAP consolidates information across disparate Lockbox sources to form a centralized pool and offers a broad range of features that gives users quick, easy, online access to all Lockbox information. Designed to give its users the flexibility they demand, it features a user-friendly, brandable interface providing unparalleled visibility into all data.

Add-on modules offer advanced features such as Exception Management Processing, Property Management, Remote Data Capture and Remote Data Entry.

Feature Highlights

Treasury Portal —

- Supports all modern web browsers
- Stores and manages all Lockbox related images and data files
- Offers complete retention control and history
- Multiple levels of security
- Document markup capabilities
- Automatic notification & subscriptions
- Interactive collaboration tools
- Easy electronic document distribution

Key Benefits —

- Collaborate in real time
- No client software to install & maintain
- Quickly find what you need
- Eliminate errors by having access to the most recent information at all times
- Reduce distribution & reproducing costs by being able to download images and data on demand

Comprehensive —

TAP allows the user to access, view, markup and share data associated with a Customer or Lockbox from the click of a button.

Secure — At all times, access to critical information in TAP is restricted to authorized users in order to maintain the integrity of all archived information. Further, customer data, images and reports are stored in a central repository with highly secured web access.



New in Version 3.5 — TAP 3.5 is a major upgrade with enhancements made in many areas. Highlights include:

- Support for all modern browsers
- Migration to Microsoft SQL Server 2019 DBMS
- Images no longer maintained in the database
- Optimized database schema for faster performance
- Elimination of data partitioning and database volumes
- Single database repository now shared with CDS 3.5
- Integration with PowerDox Remote Data Capture
- Integration with PowerDox Image Capture
- Cloud ready