

Digital Account Opening Software for Faster Customer Onboarding

Win the First Interaction. Earn the Long-Term Relationship.

Reach prospective customers through the channels they prefer, with seamless account opening across web and mobile through Digital CASA.

www.servosys.com

What Digital CASA By Servosys Delivers

Servosys combines digital onboarding, intelligent verification, workflow automation, and 3rd-party integrations to create faster, more controlled account-opening journeys.

01 Intelligent Application Initiation

Capture customer information through dynamic e-forms and automatically generate CIFs, UPI handles, and account attributes for faster, error-free account creation.

02 Omnichannel Acquisition

Deliver consistent onboarding across digital, branch, and field channels with assisted tools for relationship managers and frontline teams.

03 Real-Time Verification

Validate customer information against authoritative sources, detect discrepancies, and instantly identify duplicate customer records during onboarding.

04 Maker-Checker Controls

Apply role-based controls across critical stages with clear authorisation hierarchies and complete audit trails for stronger process governance and accountability.

05 Compliance Risk Screening

Screen applications for AML, PEP, fraud, and compliance risks, and automatically route exceptions for timely review and resolution.

06 Extensible API Integration

Connect core banking, fraud databases, credit bureaus, and verification services through a unified API layer for seamless data exchange across systems.

Challenges with Traditional Client Onboarding

- Slow & Complex Onboarding Journeys
- Frequent Customer Abandonment & Drop-offs
- Fragmented Customer Data & Information
- Manual KYC, Verification & Approvals
- Rising Compliance Burden
- Legacy Systems & Integration Constraints

Account Opening.

Designed Around Your Customers.

Online Account Opening

Enable customers to open accounts digitally through a self-directed journey that takes them from application to becoming a customer with minimal friction. Make it easy for prospects to complete the account - opening journey at their convenience, across digital channels.

Branch Account Opening

Empower branch teams with a guided, assisted account-opening journey that helps customers move smoothly from application to account activation. Give relationship teams a simpler way to engage customers, complete applications, and turn branch interactions into new relationships.

Days → Minutes

New account opened

10 Minutes

End-to-End Customer Onboarding

80%

Reduction in Onboarding Costs

40–60%

Drop in Abandonment Rate

5X

Mobile Conversion Growth

One Onboarding Platform. Supporting Endless Lending Journeys

Corporate / Institutional Onboarding

High-value, multi-entity onboarding requires rigorous compliance checks, multi-level approvals, and complex entity mapping. AI-powered document data extraction and policy-driven workflows streamline the transition from corporate application to activation.

Retail Customer Onboarding

Built to handle immense transactional concurrency during peak acquisition campaigns, Digital Casa processes high-velocity retail applications without core-banking lag while running simultaneous, invisible background fraud checks.

SME / MSME Business Onboarding

Small and medium enterprise onboarding bridges the gap between retail speed and corporate compliance. Hybrid data verification and standardised risk scoring allow rapid processing of diverse small business profiles without manual overhead.



Why Financial Institutions Choose Servosys

Proven Track Record

14+ years of experience delivering technology solutions for financial institutions, backed by a growing portfolio of enterprise deployments.

Deep Product Expertise

Purpose-built products across lending, regulatory processes, customer service, collections, and other critical financial services functions.

Customisation at Enterprise Scale

Configure solutions around complex processes, institutional requirements, and diverse operating environments, without forcing the business into a rigid product model.

Built for What Comes Next

Continuous investment in products, engineering, and emerging technologies keeps the platform aligned with evolving financial services requirements.

About Servosys

Company Profile: Indian software and product company with 365+ employees, 14+ years in operations, having corporate offices in Noida, and regional offices in Mumbai & Chennai.

Solutions Portfolio: Loan Origination System (LOS) - (SME/MSME solutions, Retail & Corporate Banking, Microfinance, Agri KCC.), Onboarding Solutions, Regulatory Solutions, Construction Finance Project Monitoring, Aadhaar Masking/PII Encryption, Credit Cards Issuance, Customer Service Request Management, Customer Grievance & Compliant Management, Online Dispute Resolution, Asset Reconstruction, Collection Solutions, and more.

Key Products: ServoStreams® BPM, ServoDocs® EDMS, ServoWebscan®, and mobility solutions with advanced imaging and scanning.

Key Features: Business Rule Engine, Routing Rule Engine, TAT Management, Auto Escalation, Exception Handling, Auto/Alert, Reminders, Document Redaction, Role-Based Access Control, Audit Log, Third Party APIs, AES 256 Encryption, Dynamic Document Generation, 360° Real time Dashboard & MIS.

Certifications & Accreditations



ISO 9001 : 2015



ISO 27001 : 2022



ISO 27701 : 2019



ISO 20000 - 1 : 2018



ISO 22301 : 2019



Contact Information

Email: inquiry@servosys.com
Website: www.servosys.com

Corporate Office/ R&D Center

Pride Tower, 1st floor, Plot, 12A, Sector 125,
Noida, Uttar Pradesh 201313

Regional Offices

Delhi: Unit 116, First Floor, US Complex, 120 Mathura Road, Jasola, New Delhi-110076, India

Mumbai: Unit 116, First Floor, US Complex, 120 Mathura Road, Jasola, New Delhi-110076, India

Chennai: 3A, First Floor, Anand Seethakathi Business Centre, Anna salai, Chennai - 600006, India