



SetBuilder™

Say goodbye to monotonous and hello to simple.

SetBuilder removes the manual and tedious task of building document sets for everyone in your organization, whether it be creating closing documentation or organizing onboarding documents for new hires.

Reduce hard costs.



You're paying teams to gather, compile, check, and re-check their work plus printing costs. **SetBuilder reduces these hard and soft costs by helping teams add documents to a planned set as they're completed, and then compiling the set into a digital PDF for delivery to the client.**

Standardize your processes.



Work products may vary, but the compilation processes are similar in nature. **SetBuilder lets teams clone document sets for use across similar projects, standardizing processes and work products, so teams can focus on delivering world-class customer experiences.**

Never miss a step.



Your teams are human, which means they may skip steps or leave things out at times, opening your organization up to various risks. **SetBuilder keeps teams on track by establishing placeholders and making it easy to identify when documents are missing.**

How Does SetBuilder Work?

SetBuilder makes it simple to organize and distribute large document sets.

Step 1: Set your headers

Headers are your document categories. You can also think of them as your table of contents.

Step 2: Add placeholders

Placeholders are where you plan which documents you need in a category and what order you need them in.

Step 3: Drop in your documents

SetBuilder accepts a variety of file types such as Word docs, PDFs, and Excel files.

Step 4: Compile your set

The magic of SetBuilder is its ability to compile all of your documents into a digital PDF for client delivery, saving you hard costs and shelf space.

Step 5: Clone your work

Do you perform transactions similar to this one? Great! Clone this set for future use and cut the planning time out of your workflow.

