



# Data integration, workflow automation, and AI — operating within your environment

## Platform Overview

Stack Ally is an enterprise-grade platform that enables financial institutions to integrate systems, automate workflows, and embed AI into operations without relinquishing control of data, infrastructure, or security.

## Core Capabilities

- System integration across databases, APIs, files, and internal services
- Workflow orchestration with approvals, branching, and execution control
- API-first execution model for system-to-system automation
- Embedded AI for document processing, extraction, and analysis
- Reusable routine library and custom-built solutions

## How It Works

- Deploys within your environment as a secure internal platform
- Routines are executed via UI, schedule, or API triggers
- Workflows connect multiple routines with logic and approvals
- AI integrates using your Azure OpenAI tenant

## Why Stack Ally

- Eliminates need for expensive third-party platforms
- Reduces reliance on large internal development teams
- Delivers production-ready automation without long implementation cycles
- Built by a financial institution with real-world operational experience

## Security & Architecture

- Runs entirely within your infrastructure
- Supports secure API authentication and key management
- Full audit logging and operational traceability
- Designed for regulated environments and compliance requirements

## Business Impact

- Reduce manual effort and operational risk
- Accelerate time to value with ready-to-use capabilities
- Improve consistency and governance across processes
- Scale automation across departments without added complexity

## Use Cases

<ul style="list-style-type: none"><li>• CRM Integration</li><li>• Regulatory and compliance reporting<ul style="list-style-type: none"><li>• Data aggregation across systems</li><li>• Automated account QC</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Loan Underwriting Automaton</li><li>• Insurance Policy Comparison<ul style="list-style-type: none"><li>• Complex Data Reporting</li></ul></li><li>• Simplified Marketing Data Mining</li></ul>	<ul style="list-style-type: none"><li>• Data Driven Lead Generation</li><li>• Automated Credit Reporting</li><li>• Round Robin Record Assignment<ul style="list-style-type: none"><li>• And much more</li></ul></li></ul>
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