



Elevating collections efficiency by pairing technology with expertise



Datasite unlocks optimized operations with GETPAID Credit & Collections

Datasite is a global SaaS provider of AI-powered workflow collaboration and automation solutions for mergers and acquisitions (M&A), investment, and strategic projects. The company's clients span investment banking, private equity, legal, corporate development and boards of directors. With headquarters in Minneapolis and locations in five continents, Datasite serves users from over 180 countries.

Since its founding in 1969 as Merrill Corporation, the company has evolved from offering financial printing and communications services to focus solely on its M&A SaaS solution. Renamed Datasite in 2020, the company continues to evolve to provide innovative tools for dealmakers, including leveraging AI and data to drive faster, smarter deal outcomes.

Datasite's search for a new collections solution began in 2012, when the finance team saw opportunities to enhance workflow efficiency and deepen visibility into customer accounts. Datasite wanted a system that was designed specifically for credit and collections and that would be easy to use. They also needed to create a business case that proved the value of such a system.

After consulting with references, Datasite selected **FIS® GETPAID** because the product had a user-friendly interface designed especially for credit and collections. Knowledgeable professional service teams, a dedicated account manager, and access to product upgrades and new features were also key factors in Datasite's decision to choose GETPAID.

Pairing technology with expertise has been transformative for Datasite's collections operations. FIS supported the business case by providing cost estimates and delivering the project on time. Additionally, during Datasite's ERP transition, the FIS professional services team assisted with remapping fields and customer numbers to ensure continuous operations.

"We had the Project Manager on-site to work through the implementation and brought them back on-site for go-live training," explained Karrie Lynch, Director of Credit & Collections for Datasite. "This was a huge win in terms of support."

"With GETPAID, collectors are now able to zero their accounts weekly."

– Karrie Lynch, Director of Credit & Collections for Datasite

At-a-glance

Objective

Standardize global collections process, improve workflow efficiency and gain greater visibility into customer accounts.

FIS solution

GetPaid Credit & Collections

Results

Streamlined collections, improved workflow and reduced overdue accounts by 3 percentage points.

Impact

With GETPAID, Datasite has:

- Standardized global collections processes
- Empowered collectors to more easily manage high account volumes
- Enabled faster access to reports for risk evaluation
- Enhanced customer communications regarding collections
- Improved management and resolution of customer disputes



3-point reduction in 90+ day overdue accounts



750 account monthly backlog eliminated



Global process standardization

“GETPAID allows me to drill down into each customer account when reviewing for monthly reserves. Our collectors now handle large volumes of accounts with ease.”

– Karrie Lynch, Director of Credit & Collections for Datasite

“Both sales and customers like the outstanding tables in our collections reminders. The flexibility in templates allow our collectors to personalize emails for improved customer relationships.”

– Karrie Lynch, Director of Credit & Collections for Datasite



Money at rest. Money in motion. Money at work.™

GETPAID helps you keep money flowing with optimized collections.

Our **technology** powers the global economy across the money lifecycle.

Money at rest

Unlock seamless integration and human-centric digital experiences while ensuring efficiency, stability, and compliance as your business grows.

Money in motion

Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.

Money at work

Unlock a cohesive financial ecosystem and insights for strategic decisions to expand operations while optimizing performance.

About FIS

FIS is a financial technology company providing solutions to financial institutions, businesses and developers. We unlock financial technology that underpins the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients confidently run, grow and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses adapt to meet the needs of their customers by harnessing the power that comes when reliability meets innovation in financial technology. Headquartered in Jacksonville, Florida, FIS is a member of the Fortune 500® and the Standard & Poor's 500® Index. To learn more, visit FISGLOBAL.COM. Follow FIS on LinkedIn, Facebook and X (@FISglobal).

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