SWBC UNITY
Connector

temenos

Enhance Cross-Selling with SWBC UNITY

Integrated to the Temenos LMS Origination Module

The SWBC UNITY connector allows financial institutions to present and cross-sell loan protection products using SWBC's UNITY® software directly through Temenos LMS Origination.

Key Features

Enhance Cross-Sell Opportunities

The SWBC UNITY connector provides loan officers with the ability to quickly and accurately support cross-sell opportunities during the loan generation process for Guaranteed Asset Protection (GAP), Extended Warranties (MBI & VSC), Credit Insurance and Debt Cancellation.

Workflow Integration

Information needed to quote and cross-sell multiple UNITY products is automatically presented as part of a custom Temenos LMS Origination workflow. This functionality provides process consistency and ensures UNITY products are presented as part of each new loan.

Reporting and Analytics

With the SWBC UNITY connector, reports and analytics can be generated to determine success rates, track performance overall, by branch or user, and create effective coaching and incentive programs.

Seamless Document Creation

All documents associated with UNITY point-of-sale products are automatically generated as part of the workflow step in the Temenos LMS Origination module and printed at the end of the loan cycle along with all other loan documents.

Benefits

Increase Sales

The SWBC UNITY connector ensures GAP and MBI are discussed with each new loan applicant, increasing efficiency and the likelihood of a successful sale.

Eliminate the Need for Multiple Programs

Eliminate time spent maneuvering between multiple screens and programs. All the necessary tools needed to utilize UNITY can be accessed directly in the Temenos LMS Origination module.

Decrease Human Error and Data Entry

Information from the Temenos database is automatically sent to UNITY and pre-populated on-screen. If any data is added directly to UNITY, the changes are immediately transferred and saved in the Temenos LMS Origination module, providing seamless, real-time integration between the two systems.

More Information

System Requirements

Version 10.18 or higher must be installed in order to utilize the SWBC UNITY connector.

Provider Highlight

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SWBC is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and families. To learn more about SWBC, visit their website at www.swbc.com.

For more information about the SWBC UNITY connector,

contact your Temenos Account Manager or e-mail UNITYSupport@swbc.com to reach SWBC directly.