



# Deposit and Treasury Management Product Origination Solution

## Consolidate client deposits and funds into one central account

Many financial institutions lack a unified solution that allows all stakeholders to readily view relevant account documents and information—this is particularly problematic and inefficient when it comes to complex processes such as origination. Bankers often need to access multiple systems to gather relevant data, which in addition to being resource-intensive, prolongs processes.

Unqork's **Deposit and Treasury Management Product Origination Solution** empowers banks to rapidly build and effectively manage a robust internal deposit and treasury management product onboarding platform. This platform allows financial institutions to efficiently manage all information gathering processes (including self-service functionality), internal approvals, and operations associated with their client onboarding.

The result is reduced costs and improved risk mitigation due to streamlined processes and integrations coupled with increased sales, and improved productivity through transparent dashboards and analytics.

### Key Benefits

- **Improved client experience:** Create self-service workflows to minimize your clients' time on administrative tasks and back-and-forth emails
- **Reduced onboarding costs:** Accelerate onboarding processes and minimize manual data entry by integrating with external systems such as company registries or rating agencies
- **Mitigated risk:** Capture the right corporate and financial information to support your fraud and risk mitigation efforts
- **Increased transparency:** Provide dashboards, status tracking, next steps, and real-time notifications to manage the process for the prospect
- **Greater flexibility:** Easily make adjustments to your workflows when regulations or processes change, keep up-to-date with onboarding best practices

## Key Capabilities



### “Native” Third-Party Functionality

The Unqork platform includes native integrations with partners such as Plaid, DocuSign, and Codat which allow companies to easily capture information and minimize manual data entry



### Automated Underwriting

Make automated decisions based on your unique business rules and escalate edge cases when necessary



### Centralized Account Management

Centralize your client accounts, deposits, and funds for a better user experience



### Dashboards and Notifications

Streamline the onboarding process with notifications within the application, via email or texts, and build dashboards for your KPIs



### No-Code Flexibility

Unqork’s no-code platform makes it easy to evolve workflows based on evolving regulations or new requirements using a visual configuration exercise

## Success Story

A national bank had a fragmented cash and treasury management system and wanted to elevate their client experience. The company sought to rapidly transform its processes and develop a solution that could seamlessly integrate with legacy systems and unify all of its client activities into one centralized location.

By leveraging Unqork’s Treasury Management Solution, the bank’s treasury and product teams were able to build a completely new platform that validated data, centralized client information, and created useful dashboards and reports for their team for enhanced visibility and productivity.

### About Unqork

Unqork is the industry pioneer no-code enterprise application platform that helps large companies build, deploy, and manage complex applications without writing a single line of code. Organizations like Goldman Sachs, Liberty Mutual, the Cities of New York and Washington, DC and Maimonides Medical Center are using Unqork’s drag-and-drop interface to build enterprise applications faster, with higher quality, and lower costs than conventional approaches.

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