

FUSION CREDITQUEST

Through Fusion CreditQuest, Lender Insights provides cloud-based capabilities to effectively manage your loan pipeline and grow your client relationships



Real time access to back office systems has made our lending staff a better partner to our business clients.”

Lender Insights provides a lender specific user interface tailored to the activities that lenders perform on a daily basis. Loan pipelines, document requirements, and KPIs can be managed through Power Apps based on Microsoft Dynamics and interface directly with CreditQuest to avoid duplicate entry and ensure real time communication.

Relationship managers find it challenging to keep up with back office obligations while dedicating the time necessary to grow long-term client relationships.

Restricted access to client data outside the office, inconsistent loan pipelines, duplicate data entry into disparate systems, and disconnected processes create significant time-management challenges.

Loan officers and relationship managers need to be building relationships and growing loan portfolios, not spending time chasing documents, re-keying data and inefficiently moving between systems without a complete overview of their clients.

Finastra, understands this challenge and presents Fusion CreditQuest Lender Insights to address this and help you work more efficiently, more effectively and grow your business.

Cloud-Based Capabilities Include:

Seamless data integration from your Microsoft Dynamics loan pipeline to CreditQuest when the loan package is ready for analysis.

- Mobile access to Fusion CreditQuest data anywhere, anytime
- Dynamic front-end to Fusion CreditQuest- Lenders spend less time in systems and more time selling
- Document Management- View missing documents or upload directly to Fusion CreditQuest from Microsoft Dynamics
- Promotes better communication- Increase operational efficiency with back office staff as information entering Microsoft Dynamics can be shared with Fusion CreditQuest in real time



More deals are getting done with information flowing in real time between sales and back office staff.”

Lender Insights Provides the Flexibility to Meet your Financial Institution’s Needs for Managing Complex Lending Pipelines and Client Relationship Management without Access Restrictions

Clients With Microsoft Dynamics CRM 365 – Option 1

Benefit from rich sales pipeline and opportunity management capabilities of native Microsoft Dynamics.

Clients Without Microsoft Dynamics CRM 365 – Option 2

Benefit from remote visibility into the client relationship details and the ability to enter new loan applications and supporting docs using Microsoft PowerApps.

Cloud-Based Tools Allow Your Institution to Effectively Compete

Fusion CreditQuest Lender Insights gives you the tools you need to successfully manage your relationships and loan pipeline. No more waiting until you get

to the office or VPN access to send documents or analyze data. Access is now within your grasp so that you can spend time where it matters, with your clients and helping to grow relationships that impact your community.

Lender Insights provides you with the integrated data to better manage financial health of your clients and provide insights to lending decisions that impact your growth while better managing risk.

With a user interface designed specifically for lenders, Lender Insights is tailored to the relationship and pipeline management activities that lenders perform on a day to day basis.

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today—spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location—from global financial institutions, to community banks and credit unions.

Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 90 of the world’s top 100 banks use Finastra technology.

Please visit finastra.com

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