

FINASTRA

Implementation and upgrade services

Tailored support for seamless implementations,
upgrades, and project oversight



Achieve smooth transitions and compliance with expert support

Whether you're a new user in need of onboarding support, an existing customer managing upgrades and compliance, or a partner leading projects, our tailored solutions provide the support you need. Let our industry-standard best practices and Finastra-certified experts keep your systems up-to-date, compliant, and fully functional, allowing your team to focus on what they do best.



Implementations for on-premises or private cloud installations

We can provide expert, client-specific support for seamless software onboarding, enabling new users to effectively utilize our Corporate Lending solutions from initial setup to full deployment and advanced features installation. If your bank lacks in-house expertise, or does not work with a partner for implementation, we can help you with a smooth transition to our software.

Our team follows industry-standard best practices throughout the entire implementation process. This includes guided installation, configuration workshops, integration design, data migration assistance, testing support, and go-live/post-go-live assistance. We work closely with you to align our services with your goals, customizing functionality and timelines according to your bank's preferences and requirements.

Our comprehensive implementation services are designed to assist banks and financial institutions in achieving seamless software implementation, efficient system upgrades, and effective project leadership for Loan IQ, Trade Innovation, and Corporate Channels.



Upgrades

If your bank needs to ensure SWIFT compliance, maintain version control for standard support, or bridge skill gaps in managing system enhancements, we can help via our standardized method for executing upgrade projects designed for Finastra's Corporate Lending solutions.

Our delivery approach simplifies the transition to the latest product release, ensuring there is no data loss. We offer a fixed scope and timeline, complete with deliverables and training for your enablement, along with full visibility of the go-live schedule.

Clients receive comprehensive support from Finastra-certified experts throughout the process, keeping systems up-to-date and compliant, with streamlined integration and functionality, and full assurance post-deployment.

We provide technical and functional upgrade support, standard interface deployment and configuration, and a post-deployment test report for full visibility and assurance. With Finastra, you can trust that your upgrade process will be managed smoothly and efficiently.

Comprehensive project support for bank-led and partner-led implementations



Bank or partner-led implementation and upgrade projects

Where banks choose to take the lead themselves or via a partner to deliver implementation or upgrade projects, Finastra can provide project support by filling gaps in product experience and knowledge.

Our Global Services team will provide specialized guidance through initial planning, project needs assessment, installation and customization oversight, progress monitoring, and ensuring a smooth go-live. Our team is there every step of the way to address issues and document lessons learned.

Finastra offers three packages:

- **Lite package:** Participation in steering committees and delivery management without solution validation
- **Essential package:** Validation at key project phase checkpoints and participation in project steering committees
- **Enhanced package:** All Essential services plus additional technical and functional support activities

Explore our range of services and support offerings

One-time consultation services to maximize your bank's performance

Expertise

Proactive support for banking excellence

Preferred Active Support

Accelerate go-live and maximize ROI with Lending tools and trainings

Application Test Toolkit

Data Propagation Tool

Academy.AI



Finastra Lending

Lending at scale

Eliminating friction and unlocking value across all aspects of lending and corporate banking.

Finastra is revolutionizing the lending experience by offering cutting-edge digital solutions that enhance customer engagement and streamline operations. Our innovative approach ensures seamless omni-channel interactions, reducing costs and accelerating deal closures for our clients.

We provide a range of innovative financial software solutions for:

- Syndicated lending
- Commercial lending
- Corporate lending
- Consumer lending
- Mortgage lending
- Trade and supply chain finance
- Cash and liquidity management
- Sustainability-linked lending

6-10%

of global trade finance
managed daily

~70%

of total syndicated
loans

\$100bn

in US-originated
mortgages annually

4m

loans facilitated
in the US every year

[Contact us](#)

About Finastra

Finastra is a global provider of financial services software applications across Lending, Payments, Treasury and Capital Markets, and Universal (retail and digital) Banking. Committed to unlocking the potential of people, businesses and communities everywhere, its vision is to accelerate the future of Open Finance through technology and collaboration, and its pioneering approach is why it is trusted by ~8,100 financial institutions, including 45 of the world's top 50 banks. For more information visit finastra.com

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