

Mphasis Silverline Treasury Management Onboarding Accelerator

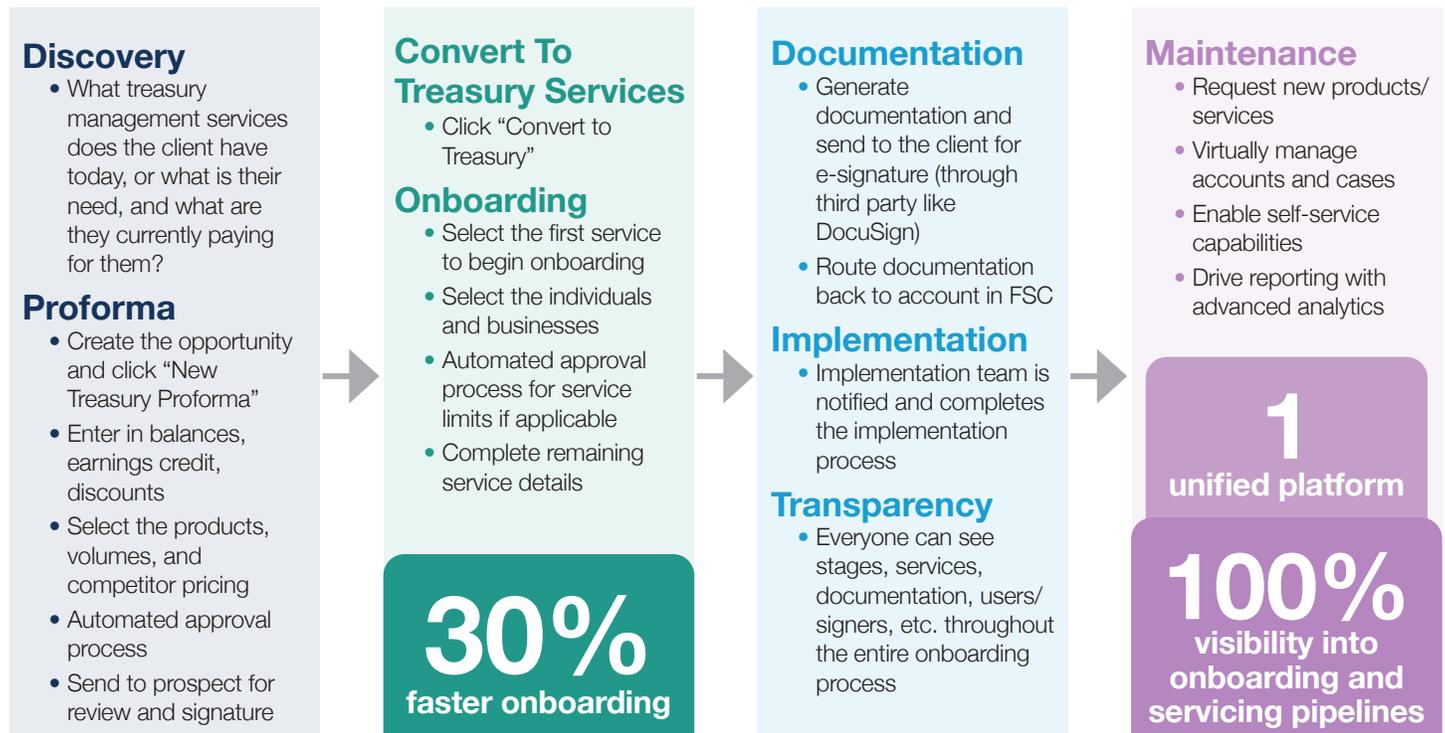
The onboarding process for treasury management services is often a disjointed mix of email-driven handoffs and fragmented task management with little to no SLA visibility.

Mphasis Silverline's Treasury Management Onboarding Accelerator bridges the gap between back-office treasury managers and front-office relationship managers within their Salesforce CRM. This automated treasury management workflow is built atop Financial Services Cloud using native Omnistudio tools, and includes proforma generation, automated approval processes, and digital onboarding to provide transparency in treasury services.

Treasury Management Onboarding Accelerator Key Elements

-  Create proforma with treasury management details and competitor pricing, generate documents, and send them to DocuSign.
-  Multi-level approval workflow within the relationship manager sales division and the treasury management sales division using Salesforce role hierarchy.
-  Digitally onboard treasury services all within Salesforce Financial Services Cloud or Sales Cloud and associate those treasury services to native financial accounts.
-  Maintenance of treasury services after onboarding, such as changing limits and adding new users.

Treasury Management Onboarding Accelerator Process



About Mphasis

As part of Mphasis, Silverline leverages insight acquired through thousands of engagements along with real-world expertise gained across the Healthcare industry, including: provider, payer, medical devices, and life sciences. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform.

For more information, visit: silverlinecrm.com/financial-services/

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