

Q 813-287-2486

Symitar Episys Integration Suite

Core Banking Integration



EMS, a prominent partner of the Jack Henry vendor program, has extensive experience integrating Symitar Episys with Salesforce through SymXchange. EMS has developed a number of core integrations to build a centralized and unified engagement platform for credit union members, regardless of multiple disparate downstream systems required to do business.

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Key Capabilities and Cases

Providing industry expertise to transform your member experience:

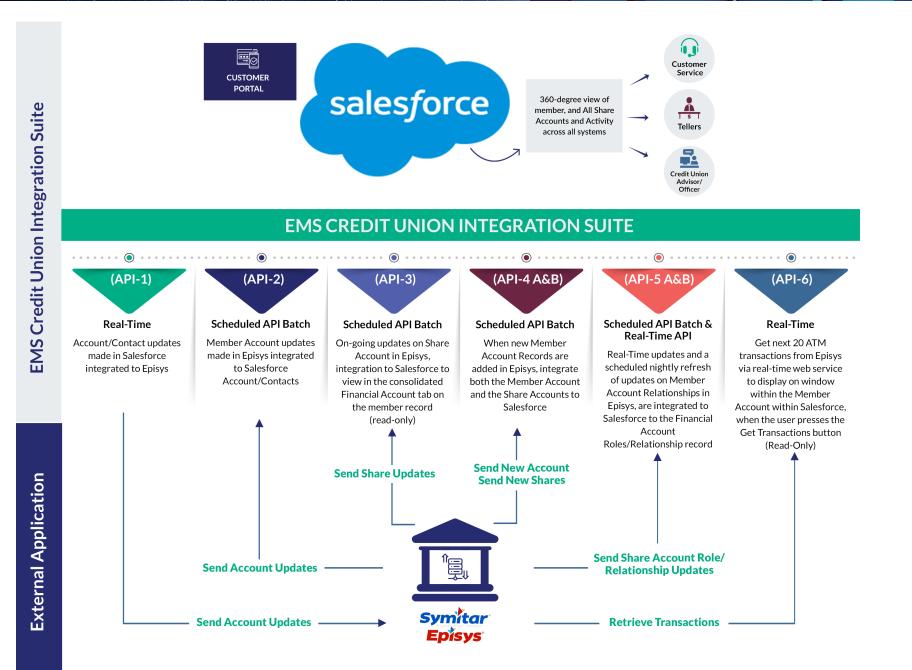
- Provide a 360 degree view of all of members in one user friendly unified and completely mobile platform, that excels at member engagement
- Consolidated view of member Account Shares and Services, Loans in process and latest status without having to log into multiple systems
- Ability to use advanced tools to market to prospects from Salesforce, and prospect information seamlessly flows into Episys to create the member account when the lead is converted
- Provide real-time member updates on existing accounts and loans in process

- Access one centralized communication hub within Salesforce that provides quick visibility to all communications and interactions across the credit union (phone calls, email, text, live chat, marketing response, etc.)
- Leverage advanced workflow automation tools within Salesforce to create task assignments for staff, automated emails/text messages to members
- Provide real time updates and business process flow automation based on milestone stage and other triggering events within the integration

Our unique architecture and configuration allows for a faster, more efficient implementation for our Credit Union customers.



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