

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.

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.

EMS Credit Union Integration Suite



360-degree view of member, and All Share Accounts and Activity across all systems



EMS CREDIT UNION INTEGRATION SUITE

