

## Expere® Managed Package for nCino®

# Enhance efficiency, ensure compliance, and streamline document management with Expere® and nCino®

Expere® is the centralized, fully-integrated document engine that provides enterprise-wide compliance documents for lending and deposit origination solutions. Wolters Kluwer has developed an Expere integration delivered as a Salesforce Managed Package, enabling nCino® customers to seamlessly incorporate document preparation into their workflows, eliminating the need for re-keying data already entered in nCino. Wolters Kluwer maintains this integration with regulatory updates, ensuring accuracy and compliance throughout the loan and deposit process.



### Operational cost savings

Accurate and compliant documentation, reducing operational costs



### Efficiency

Increased efficiency throughout the loan and deposit process



### User experience

Improved customer service and user experience, boosting consumer retention rate



### Content

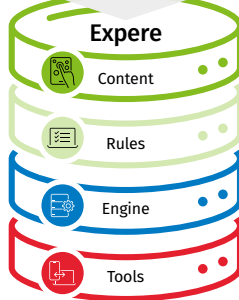
- Commercial and SBA lending
- Deposit, IRA, and HSA accounts
- Consumer lending
- Home equity lending
- Residential lending
- Assumption lending
- Loss mitigation
- Mortgage default



### Rules

- Selection rules
- Assembly rules
- Data elements
- Common schema
- Formatting
- Graphics

Warranted static and dynamic content, maintained by Wolters Kluwer



### Additional services (optional add-ons)

- Authoring tools
- Spanish language translation
- Professional Services support



### Tools

#### Integration tools

- Data dictionary viewer
- Expere testing system
- Impact analysis reports
- EZ Config
- Precedence set-up

#### Document viewer

User interface for data collection of uncollected or unmapped data elements

#### Content management tools

- Content administration
- Requirements editor
- Impact analysis reports
- Content differencing and merge
- Content build and release tools

## Key integration features



### Automated logic

Expere's dynamic content engine applies embedded compliance and business rules to tailor documents to the specific transactions



### Compliance consistency

Single content source maintained by over 50 in-house Wolters Kluwer compliance attorneys and analysts



### Document management

Effortless management of all aspects of compliance documentation within the nCino platform



### Operational efficiencies

Pre-built integration through the Salesforce Managed Package reduces implementation time, testing, and cost



### Document storage

The integration seamlessly stores generated documents directly in nCino's Document Manager, enabling quick retrieval and efficient paperless filing



### eSign support

Expere content contains embedded tags that can support any electronic signing solution



### Accessibility

Expere content contains embedded accessibility tags for screen readers per Web Content Accessibility Guidelines (WCAG)



### Configuration

Data queries and data mapping provides the flexibility needed to adapt to your nCino implementation

