

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

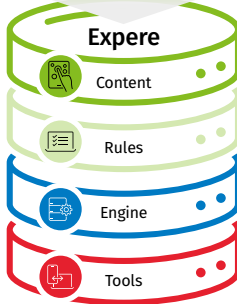
- Commercial and SBA lending
- Deposit, IRA, and HSA accounts
- Consumer lending
- Home equity lending
- Residential lending
- Assumption lending
- Loss mitigation
- Mortgage default



Rules

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

Warranted static and dynamic content, maintained by Wolters Kluwer



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

Additional services (optional add-ons)

- Authoring tools
- Spanish language translation
- Professional Services support

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

salesforce

