

OnBoardPro



This module allows the customer to seamlessly onboard new clients to its database:

- ✓ Allows for online self-onboarding
- ✓ Creates contracts on the fly for new clients
- ✓ Fully dynamic & configurable workflow:
 - eFormulaire
 - eQuestionnaire
 - Upload of documents
 - Call to any external service
- ✓ Allows to avoid manual & double input of collected data into the system by using a certified loader/service which also causes
 - Reduction of the cost of onboarding new clients
 - Reduction of the chances of errors
 - Speeds up the process

Sample Screens/Features/Options:

