



Power Apps

Xpedition



Power Automate

FS Xcelerator

Enhance customer experience, create efficiencies and achieve compliance by streamlining customer on-boarding



KYC & On-Boarding App

The KYC (Know Your Client) and On-boarding App forms part of the Xpedition FS Xcelerator Suite.

Leveraging the power of Dynamics 365 and the Power Platform, this app helps to ensure compliance with the fundamental regulatory requirement of Know Your Client (KYC) and streamline the entire client on-boarding process.

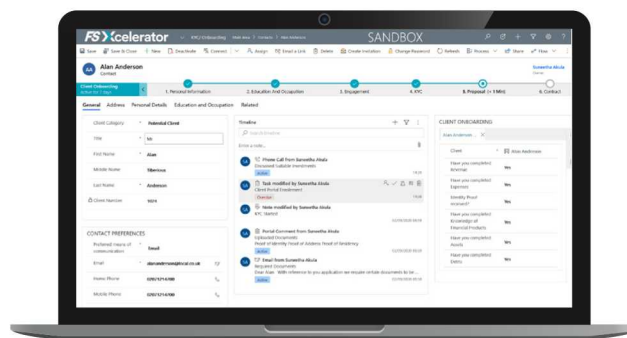
It includes proposal and contract creation and distribution together with secure document storage, providing an enhanced experience for the client, whilst creating efficiencies and accelerating the closing process.



Key Features and Benefits

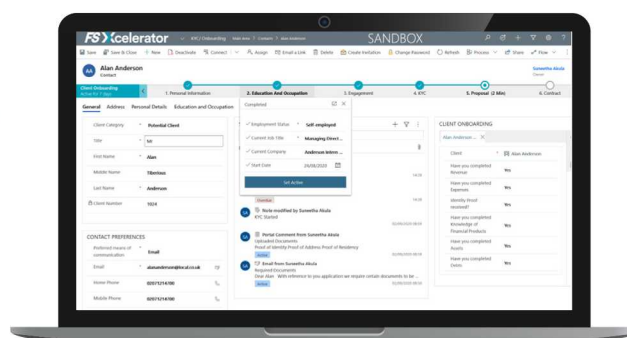
Configurable to your needs

- Configurable Business Process Flows indicate what stage the record is currently in and what activities and data are required to be conducted and captured.



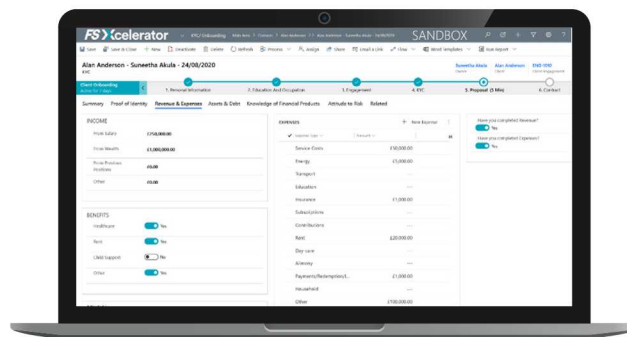
Easy to view status and actions

- Process flows lead the user through the different on-boarding stages.
- Required information is captured consistently in a logical order
- Personal information collected includes, addresses, employment details, documentary proof of identity and residency.
- The summary screen shows the status of KYC and on-boarding tasks highlighting areas that need attention.



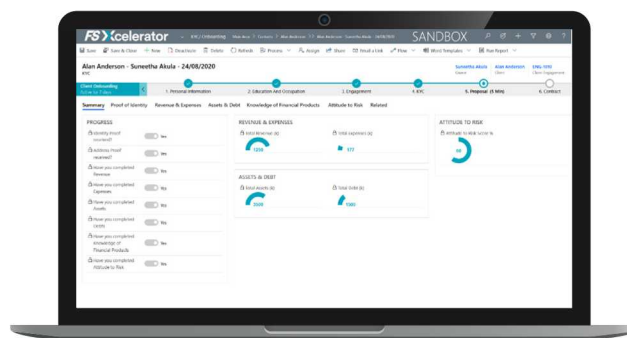
Pre-determined templates

- During the KYC stage, data can be captured around income and expenditure, using pre-determined templates.



Fully customisable screens

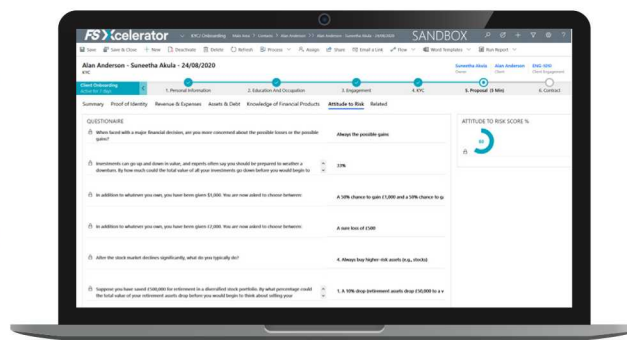
- Assets and debts can also be registered using simple to use screens that can be customised to your exact requirements.



Key Features and Benefits

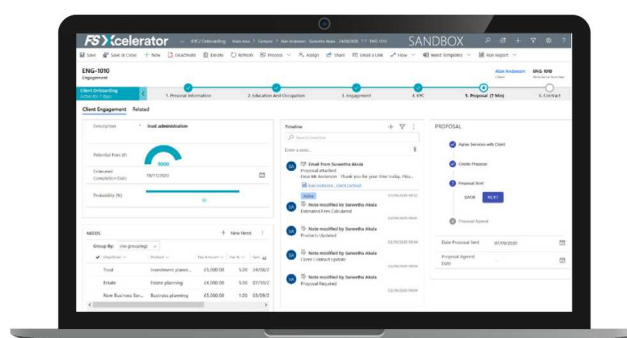
Attitude to risk framework

- Attitude to risk can be calculated using a series of questions to identify suitable products.
- Using our framework this calculation can be tailored to your precise algorithm and procedure.
- All data rolls up to the summary screen, providing immediate visibility of the status of activities and an overview of financial information captured.



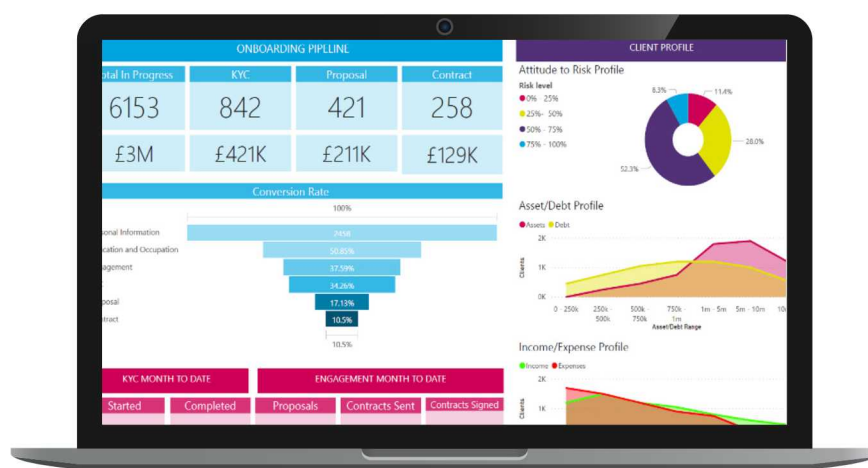
Secure Document Storage

- At proposal stage the user is led through the document generation procedure.
- The procedure automatically creates client proposals and contracts from pre-determined templates.
- Documents can be stored in secure Microsoft SharePoint document libraries.
- Documents can then be prepared for review or sent directly to clients, depending on your process.
- The documents and activities are logged against client records with minimum user input.



A single view

- All of the data captured can be analysed within standard Microsoft Power Platform tools such as Power BI.



To find out more about the KYC and On-Boarding App or any other apps in the Xpedition Financial Services Xcelerator, please contact Xpedition.

To learn more about Xpedition, visit:

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Or contact us on

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