BankWorks
PHOENIX®

Connect®
GESTOR

Technologically empower your advisors

Modern Financial Institutions must be properly technologically prepared to serve their Clients with a digital approach, empowering their advisors with high-performance solutions that allow:
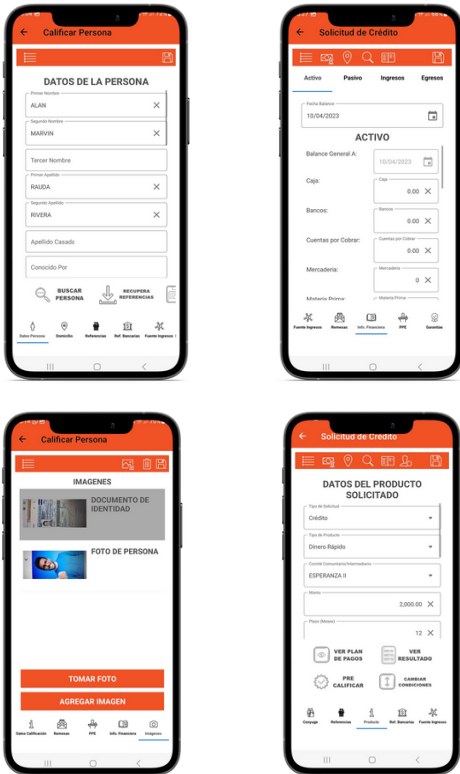
- Eliminate the need for physical documents.
- Facilitate the capture of documents and/or digital files.
- Automate the affiliation process, mitigating identity theft.
- Automate the credit and collection process.
- Mitigate operational risk and credit risk.
- Increase the level of customer service by directly assisting them in their work, business or home.

Addressing the needs of the sector and listening to our current Clients, we have evolved the Connect Gestor product, an integral part of the BankWorks Phoenix System; incorporating the latest in technologies, making integration with the central system more flexible, adding new functionalities and improvements that strengthen operational efficiency and user experience.

Functionality Features

1. Functionality supported for mobile devices with Android and IOS operating systems.

2. Synchronize the mobile device with information generated from the central system and vice versa.

3. The advisor can carry out his work through online or offline procedures depending on the case.

4. **Affiliation of new prospects:** the system allows the registration of people's information, the respective evaluation and qualification through an automated scoring process and subsequently the advisor has the option to approve to affiliate the prospect with the institution.

5. Start an individual credit request: The product requested by the client and its conditions are indicated, there is the option to verify the preliminary payment plan and then the alternative to pre-qualify through a Credit process is enabled. Scoring, which confirms whether the person is subject to credit.
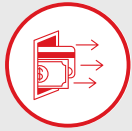
6. Start a group credit request: The system allows you to register information about the solidarity group and the information about each member of the group, the product requested and the credit conditions per member of the group are indicated, and then the alternative to qualify the line is enabled. of credit and the credits requested by each member of the cluster.

7. Start an immediate credit request: The main objective is to grant credits in a matter of minutes; The advisor will record the client's information and the requested credit; This is evaluated, qualified, approved and legal documents are generated automatically and immediately depending on the conditions of the requested credit.

8. The advisor has the option of consulting the following information when starting a new credit application for the client he is serving:

Current credits

Retrieve references of the person

Previous credit applications

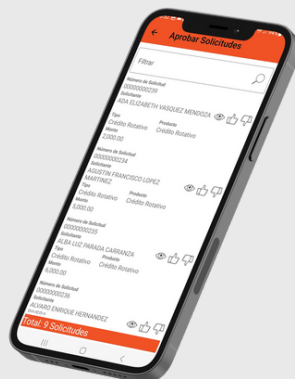Situation in internal bureaus

Situation in bureaus external

9. Depending on the policies of the financial institution, the advisor has the alternative of performing the following functions from his mobile device, as long as his security profile allows it:
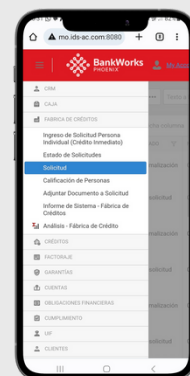

Record warranty information from the application stage
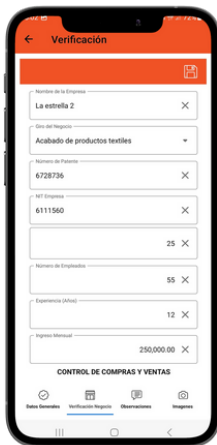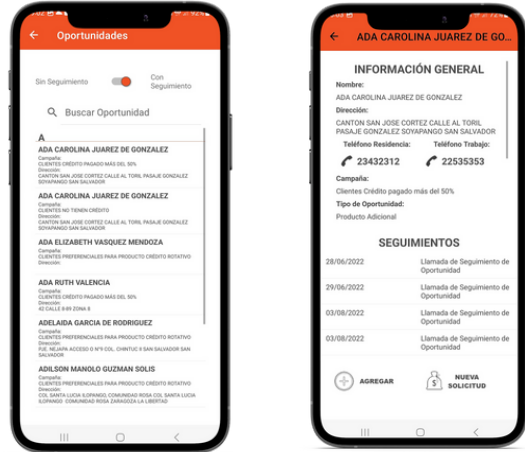

Approve credit

Access directly to the central system to complement its operational functions

10. Manage the follow-up of business opportunities that were generated through the CRM / Campaigns module.

11. Manage residence, business or work verification activities that were automatically generated through the Factory module Credits.

12. Manage activities for recovery of portfolios that were generated automatically through the Collection module.

13. The Executive can check your work statistics to evaluate your daily performance.

Technology to
grow without limits.

BankWorks
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