



Protection Advisor Expert Connector



TEMENOS
Infinity

Quote and Cross-sell CUNA Mutual Group Products

Integrated to the Loan Origination Module

CUNA Mutual Group's Protection Advisor Expert (PAX) connector makes it easy and seamless to quote MEMBER'S CHOICE® Guaranteed Asset Protection (GAP) and MEMBER'S CHOICE® Mechanical Repair Coverage (MRC) from a single platform, within Temenos Infinity.

KEY FEATURES

Directly Access the CUNA Mutual Calculator

On reaching the CUNA Mutual PAX screen, all pertinent loan, vehicle and member data is securely transferred and displayed directly within the system. Using the PAX coverage screen, the loan officer can obtain quotes using the different package options.

Retrieve Quotes and Print Documents

A simple "refresh" action, which can be done automatically in the system, pulls in the quoted product options, the cost, the status and any documents created. Documents retrieved for GAP and MRC from the CUNA Mutual Calculator are accessible within the system and can be printed along with all other loan documents at the end of the origination process.

Fulfill GAP and MRC Requests

PAX will continue to support the actual issuance process for GAP and MRC, and loan officers can continue to use PAX to quote and issue products after the loan event. The loanliner.com report manager will track and report on your sales.

BENEFITS

Increase Loan Process Efficiency

No longer do loan officers need to toggle between multiple programs during the loan origination process. In addition, PAX fields are pre-populated with information from Temenos Infinity, and all fees associated with GAP and MRC are included in the loan transaction automatically, reducing duplicate data entry and the likelihood of human error.

Boost Insurance Product Sales

The ability to quote GAP and MRC is built directly into the loan origination workflow, ensuring these products are referenced during every transaction and increasing the likelihood of a successful sale.

Provide Multiple Quotes At One Time

Using the connector, loan officers can create quotes for multiple pieces of collateral at one time as part of the loan origination process.

Monitor Performance

Using the powerful reporting functionality found in the Temenos Infinity, management can easily track and evaluate how often products are being quoted and fulfilled in order to make timely changes in strategy.

The screenshot displays the CUNA Mutual Calculator interface within a software application. The top navigation bar includes buttons for Calculate, Decision, Approve, Decline, More, Create Documents, Attach, Links, Queuing, and Core. The main window is titled "2903 - KENNETH ASACOMMON" and shows loan details such as Status (In Progress), Final (20,000.00), Int Rate (3.25), Disp Inc (2264.90), FICO (714), DTI (0.77), Post (0.74), and Product (Automobile - Workflow: model). The "CUNA Mutual Calculator" section is active, showing a "Refresh" button and a message: "Ensure that you save/book your CUNA Mutual Calculator quote before clicking Refresh or Next". Below this, there are tabs for Protection Advisor Expert, Loan, Vehicle, Coverage, and Issues. The "Recommended Package Options" section displays a table with columns for Package, Payment, and Average Cost Per Day. The table lists three options: Option 2 (Payment: \$1783.44, Average Cost Per Day: \$4.05), Option 3 (Payment: \$1925.90, Average Cost Per Day: \$4.40), and Option 1 (Payment: \$1102.00, Average Cost Per Day: \$2.64). The "Recommended Package Options" section also includes a "Features" table with columns for Feature, Applicant Covered, and Applicant Covered. The "Features" table lists various features such as Disability - Personal disability coverage, Accident coverage, and Family Lease, all of which are covered by the applicant.

Upon arriving at the PAX screen, loan officers will be provided with the option to create or edit a quote. The PAX screen will then launch, and the loan officer can complete the steps required to fulfill any GAP or MRC requests.

MORE INFORMATION

System Requirements

Version 10.24 or higher must be running in order to utilize the CUNA Mutual Protection Advisor Expert connector.


Provider Highlight



CUNA Mutual Group is the marketing name of CUNA Mutual Holding Company, its affiliates and subsidiaries. Our insurance, retirement and investment products provide financial security and protection to credit unions and their members worldwide. Our vision: To be a trusted business

partner who delivers service excellence through customer-focused products and market-driven insight.

In those states where MEMBER'S CHOICE® Mechanical Repair Coverage is offered as an insurance product, it is underwritten by Virginia Surety Company, Inc., Chicago, Illinois. The Mechanical Repair program is administered by Consumer Program Administrators, Inc., and Automotive Warranty Services of Florida, Inc., Florida License #60023.



For more information about the connector, please contact your Temenos Account Manager. You may also contact the CUNA Mutual Group directly at 1-877-264-5363.