



PREFERRED ONBOARDINGSM

A quicker, easier way for customers to get started

THE BETTER WAY TO BOARD

AN INTEGRATION WITH CLEAR BENEFITS FOR EVERY GROWING BUSINESS

Use CSG Forte's Preferred Onboarding solution and have customers up and running in no time. Say goodbye to paper applications and long approval times. It's the faster, more convenient way to board new accounts.

→ FASTER APPROVALS

Nothing stalls business like waiting. Eliminate the headache of waiting for paper applications, manual account reviews and missing documents. Preferred Onboarding automatically reviews, underwrites and approves in hours, not days.*

* A small percentage of applications may require manual review, which could take a few days to complete.

→ CONSISTENT DECISIONS

Because identity verification, business analysis and fraud detection tools are built right in, you get smarter, more reliable approvals. Each application is reviewed using industry-leading technology and backed by machine learning for clear, consistent results.

→ STREAMLINED APPLICATIONS

We know that your customers get tired of intrusive questions. Our Preferred Onboarding has a 70% reduction in the fields required for an account to be reviewed. This means less work and frustration for new applicants.

→ A FULLY INTEGRATED EXPERIENCE

Use our REST API to fully integrate CSG Forte's Preferred Onboarding right into your customer enrollment process. Simply add CSGForte's questions and code to your current method and retain your branding, user experience and workflow.

Preferred Onboarding Enrollment Process

Take a look at our simple method for boarding customers



Compared to a traditional paper application process, Preferred Onboarding with REST API is significantly faster and more consistent. To get started, email restapiapp@forte.net or call us today.



Call
866-290-5400

Email
sales@forte.net

Visit
forte.net