FINBOA Treasury Onboarding

Automate to Accelerate Growth

Seamless Treasury Account Acquisition, Faster Time to Revenue

Manual treasury onboarding processes are no longer sustainable. Paperwork, inconsistent workflows, and siloed systems delay revenue, creating compliance risk and frustrating account holders.

FINBOA Treasury Onboarding empowers financial institutions to simplify, digitize, and automate treasury onboarding workflows— enabling faster revenue capture, better account holder experiences, and reduced operational risk.

Built specifically for banks and credit unions, FINBOA's cloud-native solution removes inefficiencies by replacing spreadsheets and manual coordination with intelligent automation.

With FINBOA You Can . . .

→ Eliminate time-consuming paperwork that impacts sales and clients

→ Digitize forms, contracts, and requests in one platform

→ Improve visibility, approvals and client communication

→ Capture fee income and new deposits faster

Why It Matters

Financial institutions struggle with efficiently onboarding treasury accounts, given the complexity of treasury services and limited resources.

Legacy onboarding processes are too slow, error-prone, and fragmented to support competitive growth.

FINBOA offers a proven way to digitize treasury services and unlock speed, transparency, and scalability—without requiring core system integration.

Included Treasury Workflows

→ Onboarding
→ Setup
→ Maintenance

Services Supported

Online Banking, Cash Management, ACH Origination, Wire Services, RDC Services, LOC Sweeping Services, ZBA Services, Check/ACH Positive Pay Services, Bill Payment Services, Merchant Services, Business Credit Cards, Procurement/Payment Cards, Cash Vault Services, Lock Box Services

FINBOA Treasury Onboarding Scope

FINBOA Treasury Onboarding is a SaaS solution helping treasury sales, front-line staff, compliance and implementation teams accelerate the onboarding of treasury service.

Maintenance

1 Company Setup — Treasury Sales

2 Product Selection — Treasury Sales

3 Approvals — Executives, Underwriting, Committees

4 Contracting — New or Existing Customers

5 Implementation — Treasury Implementations

Experience faster time to revenue and increased sales.

Cloud-Native, No Integration Required

FINBOA Treasury Onboarding offers a zero-integration, cloud-native SaaS platform that supports fast deployment and enterprise-wide access. With role-based permissions, real-time status tracking, and built-in audit controls, FINBOA offers unmatched transparency and control across your onboarding process.

Key Capabilities:

→ Centralized case management and document repository

→ SLA monitoring and audit-ready reporting

→ Configurable user access across departments

→ Rapid deployment—no core or third-party integration needed

Transform Treasury Onboarding Into a Growth Driver

Stop relying on spreadsheets, emails, and disconnected systems.

Start delivering a streamlined, intelligent onboarding experience that delights account holders and empowers teams.

Clients Share Success With FINBOA Treasury Onboarding

"Within just two months, we transformed our Treasury Onboarding from a slow, manual process—relying on paper and email—to a fully digitized workflow. The feedback from both customers and staff has been overwhelmingly positive. FINBOA made that possible."

"FINBOA's Treasury Onboarding solution speeds up customer onboarding and accelerates cash flow. With a faster account opening process, our sales team can get back into the field and focus on what they do best—selling."

- SVP, Senior Operations Officer of large Midwest bank

About FINBOA

FINBOA provides intelligent process automation software that helps financial institutions eliminate manual systems, simplify compliance, and reduce operational risk. Trusted by over 400 banks and credit unions nationwide, FINBOA enables institutions to scale profitably, enhance account holder experience, and achieve operational excellence.

Headquartered in Houston, Texas.

Learn more at www.finboa.com or follow us on LinkedIn, Facebook and X.

Scan Code to Schedule a Demo Today

FINBOA