

nCino SmartBroker + Acturis feature list

Acturis and nCino are working together to provide users with rich, contextualised, and connected company information.

Feature/Benefits	SmartBroker User only	Acturis User + SmartBroker	Acturis Integration only
Add Contact to Acturis	×	✓	✓
Add Contact to Acturis with SmartBroker Lookup	×	✓	✓
View and Maintain Contact records in Acturis	×	✓	✓
Add Directors to Acturis Contact	×	✓	✓
Add Directors to Acturis Contact with SmartBroker Lookup	×	✓	✓
View and Maintain Directors (of a Contact) in Acturis	×	✓	✓
View Company News Panel	✓	✓	✓
View External Records Screen	×	✓	✓
Enrich Acturis existing Contact with SmartBroker Lookup	×	✓	✓
Enrich Acturis existing Directors with SmartBroker Lookup	×	✓	✓
Track and Untrack a Contact	✓	✓	✓
View Tracking Notifications in Acturis	×	✓	✓
Run Screening	✓	✓	✓
View Screening Flags	✓	✓	✓
Access SmartBroker to Complete Screening	✓	✓	×
Access SmartBroker to Download Screening PDF	✓	✓	×
Bespoke News Filtering	✓	✓	×
Prospect List Building	✓	✓	×
Sector/ Market News Intelligence	✓	✓	×
Bulk upload your watchlists from SmartBroker	×	✓	×