FIS APEX CORE CAPABILITIES

User Self-Service Highlights

APEX CAPABILITY | APEX PAGE/ VIEW | USER INTENT | CONFIGURABLE UI/ RULE | EXTERNAL PROCESS | TEXT FUTURE OPPORTUNITY

Configuration

Find FI Info or customize UI?

FI Snapshot

- View FI's profile and product info
- Discover new product or feature opportunities

LOB Detail

- Turn on/ off features from a product
- Track product related current projects and open tickets

FIS Client Database

Global or role level?

Logo

- Upload FI's logo

Color

- Set primary brand colors

Language

- Define/ edit terminology

Which role ?

Goal

- Chose role based goals
- Set targets
- Edit goal details
- Create new goals

Page

- Show/ hide/ reorder components for a page

Component

- Show/ hide/ reorder pieces of information for a component
- Edit field level information

Workflow

- Define suggested actions
- Create memo templates

Servicing

- Set up behavioral nudge triggers and response channels

Team

- Add users to a role
- Control user level permission

Search

Global or page level?

Global Search

- Access personal 3 recent searches & favorite searches
- Search for customer name, partial card number and phone number
- Directly launch a workflow for a consumer
- Voice-enabled natural language search

In-Scope Search

- Search a piece of content in a page
- Launch a workflow related to the page context

Transactions

Servicing or research?

Which consumer ?

Consumer Overview

- See latest status and activities for each account
- Launch a workflow from role based suggested actions
- Discover new product opportunities for a consumer

Recent Transactions

- See latest status and activities for each transaction from a consumer

All Transactions

- Customize personal table view and save as a preset
- Look for fraud patterns across all consumers
- See impact of rule on historical data (run test)

- Select a file type to export the transaction list
- Preview and export all data (including hidden data)

Transaction Detail

- Start a workflow related to a transaction (i.e. verify a transaction also automate external processes)
- View memos related to a transaction
- Add/ edit blocking rule

SecurLOCK

Prim Member System

Memos

Find or create a memo?

Which consumer ?

Recent Memos

- Quick access to the 5 most recent memos for a consumer
- View/ add account level memos

All Memos

- Search memos by type or classification
- Export memos as a word doc or pdf
- Set hierarchy of importance based on comments
- Associate different memos together, a linking capability that shows dependencies
- Collaborate through inter-department memos

Memo Detail

- Add comment to an existing memo
- See expiration date of memo
- Export memo data to CRM

CRM

Memo Creation

- Create memo from templates
- Add permissions to memos (who can view)
- For system notes block re-classification, it forces users to add a note

Follow-Up Task

- Create an associated follow up task (system generated suggestions based on memo type) and specify due date and assignee

Tasks

Find/ create a task or manage upcoming tasks ?

Task List

- Search for tasks by key words, date range, priority and overdue
- Switch to view my personal tasks or team tasks
- Create a new task (with the ability to choose from templates with pre-defined key steps/ milestones)

Task Calendar

- View and track progress of personal or team tasks/ events by week
- Organize tasks as prioritized daily queue

Simple or complex task?

Task Detail

- Assign/ handoff a task
- Attach files, add comments
- Track milestones and key steps
- Update or complete a task with the ability to auto generate memos

Task Hub

- View or update a multi-steps task

Servicing

Track my tasks or see overall status?

My Panel

- Quick access to personal saved workflows
- Stay informed of high priority notifications

Personal Setting

- Review and modify personal role based notification setting (i.e. turn on/ off specific delivery channels (i.e. consumer life events, education updates)

Dashboard

- Track personal performance goal progress
- Compare my performance with industry standard
- Track the overall performance of my project, department or branch (i.e. present branch manager profitability with their total branch revenue)

Rules

Create, edit or manage/ view rules?

Rule Creation

- Input criteria and create new rule to submit for approval or save as draft
- Exclude, override, or transfer rules between BIN/ PANS or geography
- View edit history and recent activity
- Test rule

Edit Rule

- Access saved draft of rule from notifications or tasks tab
- Input criteria and create new rule to submit for approval or save as draft
- Exclude, override, or transfer rules between BIN/PANS or geography
- View edit history and recent activity
- Test rule

Rules List

- Search for rules by key words, date range, geography, merchant and other relevant criteria
- Customize personal table view and save as a preset
- Look for fraud patterns across all consumers
- Create new rule
- Override, delete or archive rule from table
- See impact of rule on historical data (run test)

- Select a file type to export the rule list
- Preview and export all data (including hidden data)

TEST

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TEST