



CX24

AUTHENTIC ROOTS. AMBITIOUS PURSUITS.

CSI

WHAT'S NEW AND WHAT'S NEXT:

NUPOINT PRODUCT

UPDATE

AGENDA

01 – CenterDoc

02 – CSI IQ

03 – Teller/Teller Capture

04 – New Account
Console

05 – CRM

06 – NuPoint Updates



MICHAEL BARNES
Director – Strategic
Product Management, CSI

CENTERDOC UPDATE

YEAR IN REVIEW

- Migration of banks from CenterDoc 1.0 to 2.0
- Merging document types
- Multi-document viewing
- Mass-indexing selected search results
- API for retrieving images from CenterDoc
- Custom entity records
- Indexing cover page for barcode formats

COMING SOON TO CENTERDOC

- Annotations icon on search results page
- Audit log for stored documents
- Additional CSI application integrations
- Full bank sync



THE FUTURE OF CENTERDOC

APIs

Additional APIs for updates to or replacement of documents and indexing data

Integrations

Additional integrations internal and external

Enhancements

User interface and efficiency gains

CSI IQ UPDATE

YEAR IN REVIEW

- Added Help links on all catalog dashboards
- Bookmarking and Help links on all analysis views
- Sample reports for FMS Trending
- Standard reports for schedule documents
- Additional universes added:
 - CSI Wire
 - FedNow
 - FMS Trends

YEAR IN REVIEW

- Print Current Page (PDF) option in Visualizer
- Sorting capability on My Views in Executive View

COMING SOON TO CSI IQ

- EOM totals on Executive View link in financial dashboard
- Improve UI layout to enhance user experience within new Explorer Tile
- All documents standard Report to IQ Viewer/Creator
- Field additions

THE FUTURE OF CSI IQ

Field Additions

Exposing new fields as needed.

Dashboards

Ability to create and save custom dashboards and key performance indicators.

Expanded Access

Addition of new universes as needed.





JONATHAN SHORT
Director – Strategic
Product Management, CSI

NUPOINT TELLER AND
TELLER CAPTURE
UPDATE

YEAR IN REVIEW

- CRM campaign and interaction integration
- Reg CC Hold automation
- ID scanning into CenterDoc

COMING SOON TO TELLER CAPTURE

- Electronic Signature Collection using Kinective/IMM
- Teller Capture remote overrides will display scanned items before approval
- ID and Signature Card Verification using CenterDoc

THE FUTURE OF TELLER AND TELLER CAPTURE

ID Verification

ID/Signature Card viewing will begin using the latest version of CenterDoc

Fraud Detection

Real-time fraud detection using WatchDOG Fraud

e-Receipts

Receipts can be delivered via SMS text message using Kinective

NUPOINT NEW ACCOUNT
CONSOLE UPDATE

YEAR IN REVIEW

- ACH funding for CDs in NuFund
- CRM Prospects, Campaigns and Interactions
- Auto Index ID to CenterDoc

COMING SOON TO ACCOUNT OPENING

- ID barcode scanning for New Account Console and NuFund ID
- Auto Open Account to Core from NuFund
- TruStage Dynamic forms

THE FUTURE OF ACCOUNT OPENING

One-time Passcodes

One-time passcodes will be added to NuFund for a more secure experience

Fraud Detection

Integration into WatchDOG Fraud

Business Account Opening

Business accounts for Online Account Opening

NUPOINT CRM UPDATE

YEAR IN REVIEW

- Campaign and Interactions Integration with Teller and New Account Console
- Integrated Case and Workflow with CenterDoc 2.0

COMING SOON TO CRM

- Automated Action Items – Address, Phone Number, Email
- AAI for Holds
- AAI for Stop Pays

THE FUTURE OF CRM

Digital Integration for AAs

Stop Pays and other tasks
will be integrated with
Digital Banking

Dynamic Templates

Adding features to my
Campaign templates more
dynamic and easier to
design

NUPOINT
POD+/SMARTBRANCH
UPDATE

COMING SOON TO SMARTBRANCH & POD+

- Mitek scanner drivers for all scanning applications
- POD+ Rollout
- POD+ Payee matching for Positive Pay



KIM VELASQUEZ
Director – Strategic
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NUPOINT UPDATE

YEAR IN REVIEW

- NSF Representment – Phase 2 & 3
- TES – Dual Control
- CIF – File Maintenance
- LNS – Collateral Description Expansion
- Integration with Hawthorn River via Bridge
- LNS – Prepayment Penalty Expansion to 10

FUTURE

- CF-85 changes – to more accurately identify the Under Insured customers
- DDA/SAV – requirement and result to either receive a reward or alleviate a service charge
- LNS – Retry Payments for External ACH
- LNS – Basel IV
- LNS – Escrow Deficiency vs. Escrow Shortage

FUTURE NUPOINT ENHANCEMENTS – DEPOSITS

CF-85, Under Insured Deposit Report

Enhance the following:

- Beneficiary accounts
- ICS & Reich & Tang accounts
- Brokered Deposits
- Public Funds
- Collateralized/pledged accounts

DDA/SAV Requirements

This will be an optional display on the statements. It will show the count that was required to alleviate a SC or receive a reward.

FUTURE NUPOINT ENHANCEMENTS - LNS

LN Pmt to ACH

The loan/transfer system will handle the external payment as it does today; however, if the payment is returned, the user can identify the item as returned and mark it as a "Retry."

Basel IV

Three-year timeline for Implementation of this Risk-Weighted Asset regulation.

Escrow Deficiency vs. Shortage

Will allow banks to recoup escrow deficiencies in a shorter time frame than escrow shortages (2 – 11 months).

API DEVELOPMENT

API DEVELOPMENT – NEW ENDPOINTS

DDA

Post new stop payments

LNS

Get active loans

Get delinquent loans

Get loans by a created date

Post loan renewals

TDA

Create new CD customers
& accounts

Get CD posted activity

THANK YOU!



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