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DEVELOPMENT PORTAL & MARKETPLACE UPDATE

OPEN BANKING

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With more than 25 years in business and product management, Shanda currently leads CSI's Open Banking strategy. The focus of the Open Banking team is to deliver the best integration experience for banks and vendors as well as empower to them to expand into BaaS and PaaS markets.

SHANDA PURCELL
Senior Director – Product Management, CSI

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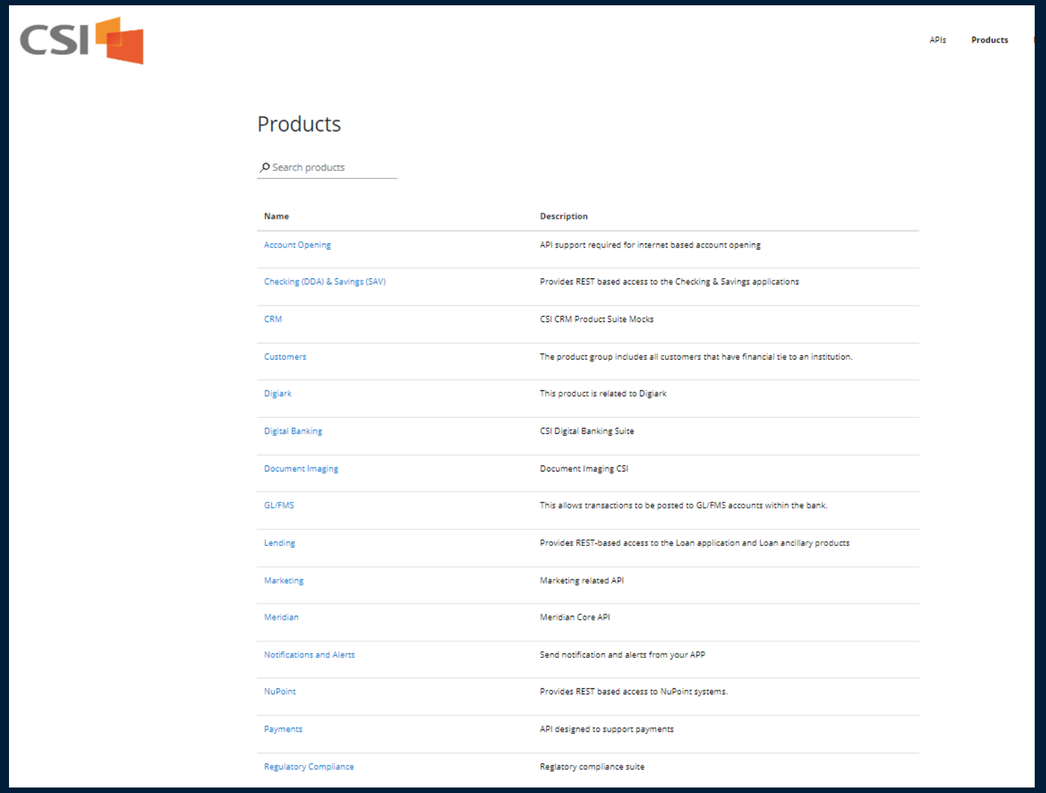
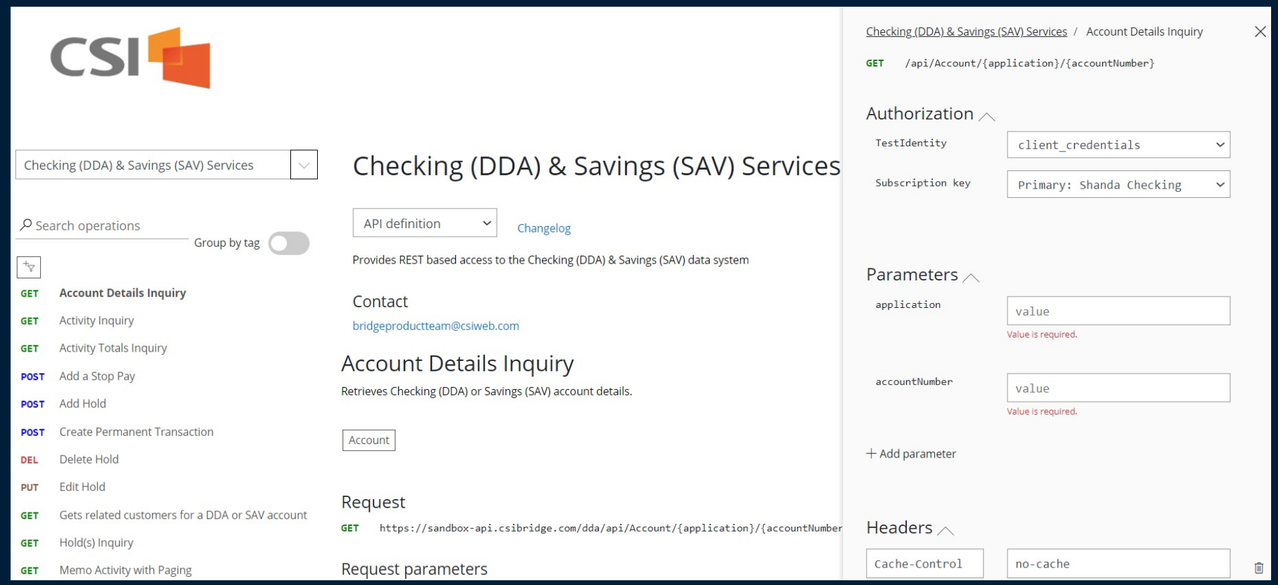
DEVELOPER PORTAL (CURRENTLY CSIBRIDGE SANDBOX)

Our Developer Portal contains information about available APIs. While the website is designed mainly for technical teams developing integrations, it offers valuable information for anyone pursuing a third-party integration.





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DEVELOPER PORTAL (CURRENTLY CSIBRIDGE SANDBOX)

Why be familiar with the Developer Portal?

- Understand available equivalent application functionality.
- Understand what data passes through the API and shared information.
- When considering a third-party, real-time integration, be familiar with what APIs can do.

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DEVELOPER PORTAL – WHY INVEST?

How does investing in our Developer Portal help you?

Capability	Value
Access to Sandbox Test Environment with sanitized application data	Development to data that mimics actual scenarios reduces potential issues during go live.
Sample Request Messages in multiple programming languages	Copy and go samples reduce development time.
Application and Technical Guides	Insight into CSI specific application business logic empowers developers and reduces their reliance on support.
Change Log and Metrics	By communicating API changes and environment metrics, developers can stay aware of the latest and greatest.

Speed of Integration = Decreased Cost & Increased Efficiency

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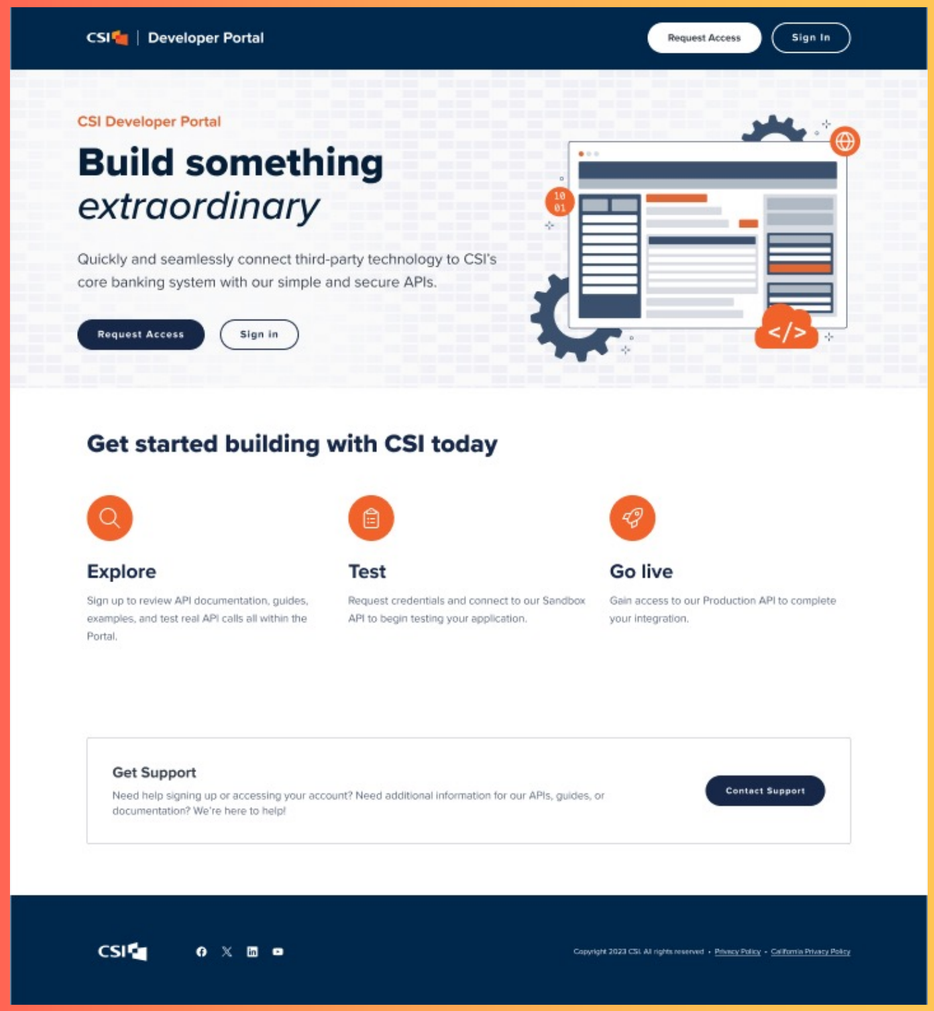
DEVELOPER PORTAL – NEW LOOK & NEW FEATURES



- Streamlined Sign-Up and Sign-In Process
- Easy Access to Request Support

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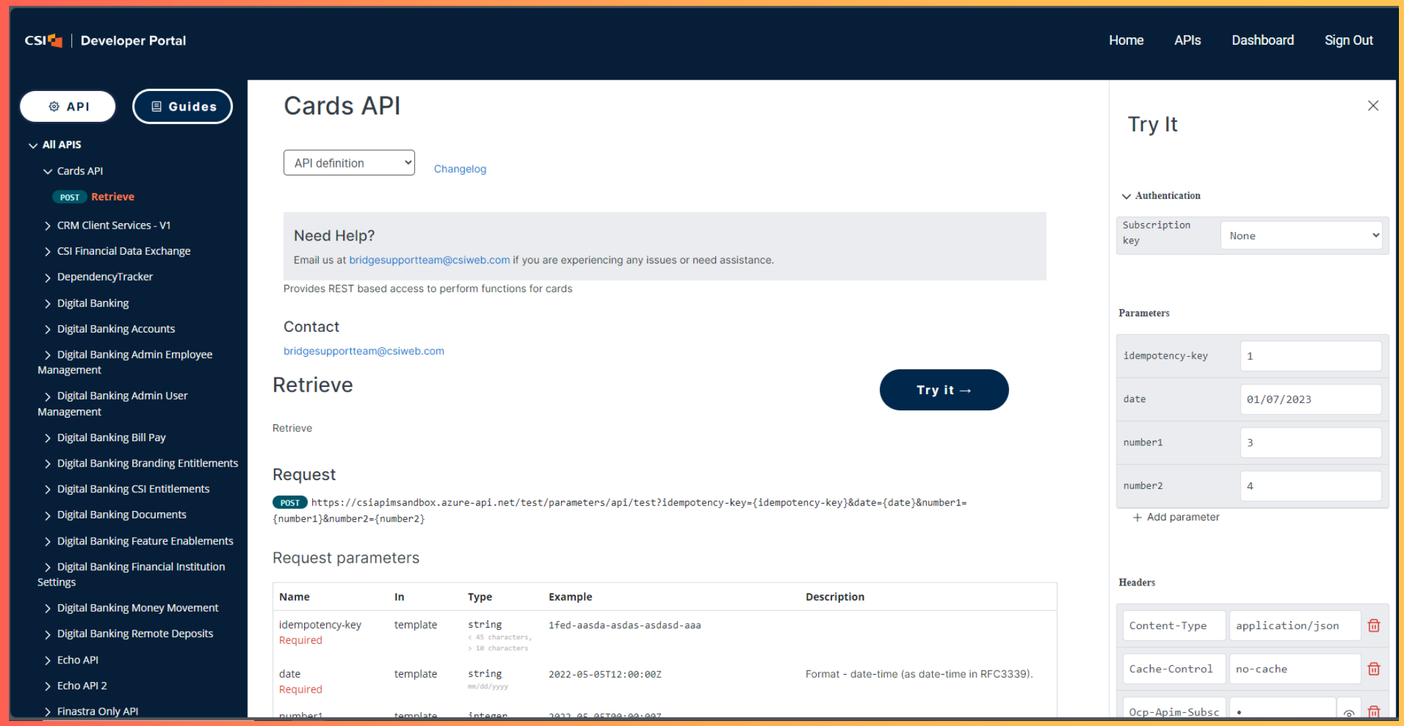
DEVELOPER PORTAL – NEW LOOK & NEW FEATURES



- Streamlined Navigation
- New Technical & Application guides
- Updated Support Page
- New Try It Button
- Standardized Sample Code & Message Bodies

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DEVELOPER PORTAL – NEXT STEPS

- Launch the redesigned portal
  - Published Roadmap Date target Q3 2024
- Improve the API Subscription Sign-Up Process
  - Tentative target Q4 2024
- Improve Test Environment Performance
  - Tentative target Q4 2024

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API UPDATES – ENTERPRISE-WIDE API STANDARDS

- Complete Documentation
  - Confirming API Field Names match Application Field Names
  - Indication of Required Fields
  - Confirming API Field Types match Application Field Types
  - Non-Technical, Complete Descriptions that match CSI Help where applicable
- Standardized API Versioning ~ Limited Breaking Change Releases
- Standardized Error Handling and Published Details
- Standardized Sample Code & Message Bodies

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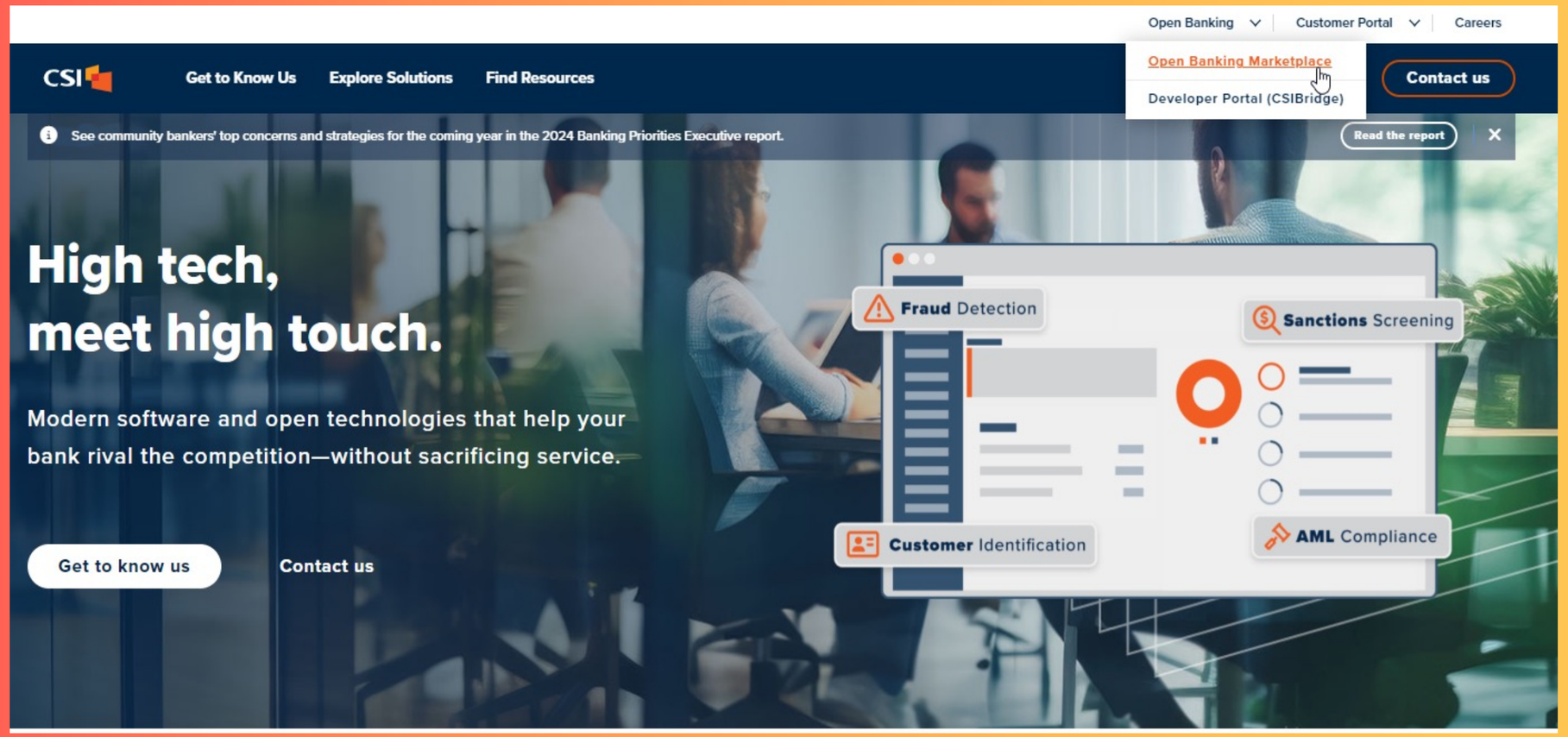

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OPEN BANKING MARKETPLACE

New Integrations

- Hawthorn River – Exception Tracking
- Core10 –
  - Accrue
  - Mesh Integration for PayNearMe
  - Mesh Integration for NetSuite
- Hyosung - ITM
- Wolters Kluwer – Compliance One+

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CSI API UPDATES

API UPDATES SINCE JUNE

- Loans
  - Committed Hold fields will be added to CSI Bridge Functionality for API users (LNS).
  - Loan Renewals
  - Loan Prepayment Penalties
  - Swap Rate Dealer
  - Loan Error Responses
- Time Deposits
  - Create Certificate of Deposit Customers and Accounts
- Demand Deposits
  - Account restrictions for inquiry/lookup access will now pass through as expected.
  - Stop Pay functionality added to CSI Bridge functionality for API users

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API UPDATES

Product API Updates are communicated now through Applications Release Memo and in the Change Log section of the Developer Portal (CSIbridge Sandbox)

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Questions?

Contact **Info**

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THANK YOU!
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