



CX24

AUTHENTIC ROOTS. AMBITIOUS PURSUITS.



DEVELOPMENT PORTAL & MARKETPLACE UPDATE

OPEN BANKING



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

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.

The screenshot shows the 'Products' page of the Developer Portal. It features a search bar and a table listing various products. The table has columns for 'Name' and 'Description'. The products listed include Account Opening, Checking (DDA) & Savings (SAV), CRM, Customers, Digark, Digital Banking, Document Imaging, GL/FMS, Lending, Marketing, Meridian, Notifications and Alerts, NuPoint, Payments, and Regulatory Compliance.

Name	Description
Account Opening	API support required for internet based account opening
Checking (DDA) & Savings (SAV)	Provides REST based access to the Checking & Savings applications
CRM	CSI CRM Product Suite Mocks
Customers	The product group includes all customers that have financial tie to an institution.
Digark	This product is related to Digark
Digital Banking	CSI Digital Banking Suite
Document Imaging	Document Imaging CSI
GL/FMS	This allows transactions to be posted to GL/FMS accounts within the bank.
Lending	Provides REST-based access to the Loan application and Loan ancillary products
Marketing	Marketing related API
Meridian	Meridian Core API
Notifications and Alerts	Send notification and alerts from your APP
NuPoint	Provides REST based access to NuPoint systems.
Payments	API designed to support payments
Regulatory Compliance	Regulatory compliance suite

The screenshot shows the details for the 'Checking (DDA) & Savings (SAV) Services' API. It includes a search bar, a list of operations with their HTTP methods, contact information, and a detailed view of the 'Account Details Inquiry' endpoint. The endpoint details include authorization options, parameters, and request headers.

Checking (DDA) & Savings (SAV) Services
Provides REST based access to the Checking (DDA) & Savings (SAV) data system

Operations:

- GET Account Details Inquiry
- GET Activity Inquiry
- GET Activity Totals Inquiry
- POST Add a Stop Pay
- POST Add Hold
- POST Create Permanent Transaction
- DEL Delete Hold
- PUT Edit Hold
- GET Gets related customers for a DDA or SAV account
- GET Hold(s) Inquiry
- GET Memo Activity with Paging

Contact: bridgeproductteam@csiweb.com

Account Details Inquiry
Retrieves Checking (DDA) or Savings (SAV) account details.

Request: `https://sandbox-api.csibridge.com/dda/api/Account/{application}/{accountNumber}`

Request parameters:

- Cache-Control: no-cache

Authorization:

- TestIdentity: client_credentials
- Subscription key: Primary: Shanda Checking

Parameters:

- application: value (Value is required.)
- accountNumber: value (Value is required.)

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.

DEVELOPER PORTAL – WHY INVEST?

How does investing in our Developer Portal help you?

Capability

Access to Sandbox Test Environment with sanitized application data



Sample Request Messages in multiple programming languages



Application and Technical Guides



Change Log and Metrics



Value

Development to data that mimics actual scenarios reduces potential issues during go live.

Copy and go samples reduce development time.

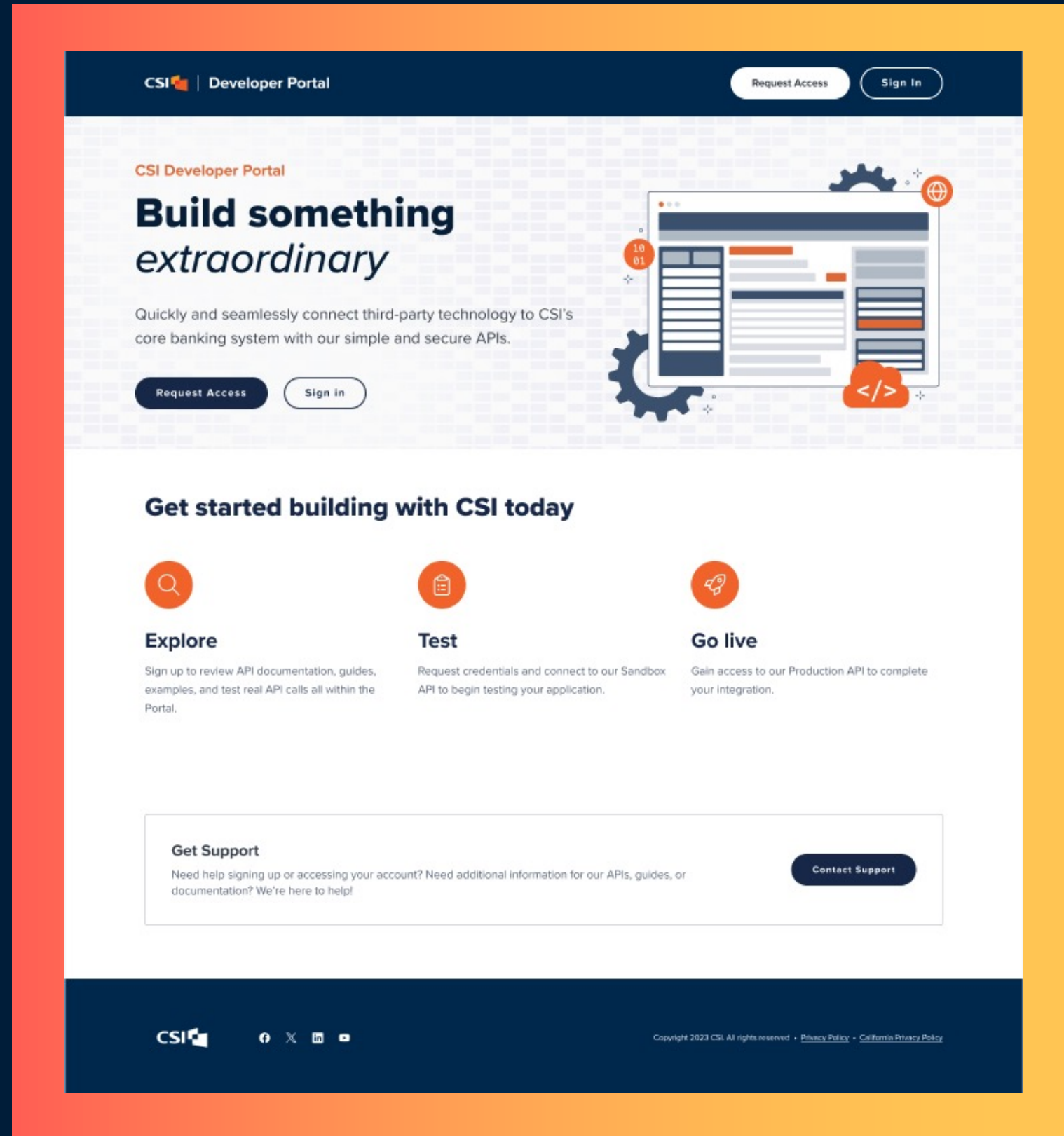
Insight into CSI specific application business logic empowers developers and reduces their reliance on support.

By communicating API changes and environment metrics, developers can stay aware of the latest and greatest.

Speed of Integration = Decreased Cost & Increased Efficiency



DEVELOPER PORTAL – NEW LOOK & NEW FEATURES



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

DEVELOPER PORTAL – NEW LOOK & NEW FEATURES

The screenshot displays the Developer Portal interface for the Cards API. The main content area includes a 'Try It' button and a 'Request' section with a URL: `https://csiap1msandbox.azure-api.net/test/parameters/api/test?idempotency-key={idempotency-key}&date={date}&number1={number1}&number2={number2}`. A 'Request parameters' table is also visible.

Name	In	Type	Example	Description
idempotency-key Required	template	string < 45 characters, > 10 characters	1fed-aasda-asdas-asdasd-aaa	
date Required	template	string mm/dd/yyyy	2022-05-05T12:00:00Z	Format - date-time (as date-time in RFC3339).
number1	template	integer	2022-05-05T00:00:00Z	

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

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

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

OPEN BANKING MARKETPLACE

Open Banking | Customer Portal | Careers

CSI | Get to Know Us | Explore Solutions | Find Resources

Open Banking Marketplace | Contact us

Developer Portal (CSIBridge)

See community bankers' top concerns and strategies for the coming year in the 2024 Banking Priorities Executive report. | Read the report

High tech, meet high touch.

Modern software and open technologies that help your bank rival the competition—without sacrificing service.

Get to know us | Contact us

Fraud Detection | Sanctions Screening

Customer Identification | AML Compliance

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+

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

API UPDATES

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

Questions?

Contact **Info**

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THANK YOU!



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