



Factsheet – Fusion Phoenix Enhanced Deposit Origination

Enhanced deposit account origination for Fusion Phoenix featuring Fusion DepositPro Forms

As today's customers spend less time banking in physical branches, it's more important than ever for financial institutions to leverage this limited and invaluable face time to build relationships and cross-sell effectively.

Enhanced Deposit Account Origination for Fusion Phoenix core featuring Fusion DepositPro® forms saves time and reduces manual data entry, so you can open multiple accounts at one time in less than five minutes. Less time spent on mundane tasks associated with new account origination means more time spent interacting with customers in a meaningful way.

Enhanced Deposit Account Origination also makes it less painful for new customers to switch relationships from one institution to yours. The ability to open accounts for multiple people in one session, and to open both personal and business accounts in the same session, eliminates consumer objections to changing their primary financial institution relationship.

How Does It Work?

At the heart of Enhanced Deposit Account Origination lies wizard functionality and driver license scanning that effectively combines all steps of deposit account origination and automates data entry.

Self-Contained Wizard Key Features

- ID Verification: launches and performs BizChex® and QualiFile check.
- Ability to order regular checks or starter checks.
- Supports deposit account origination for multiple people in the same session.
- Open business and personal accounts in one session.
- Information seamlessly pushed by Web service to Fusion DepositPro.
- Integrated compliant forms.
- Driver's License Scanning Features.
- Automatically reads and populates metadata: Name, address, date of birth.

New enhanced functionality

Additional Efficiencies

- Fast and efficient origination of HSA accounts and easy printing or reprinting of the related HSA forms.
- Pause and Resume feature offers flexibility to save information during the customer assessment and retrieve later.
- Allows multi-tasking opportunities to employees.
- Offer freedom to start and cancel the origination process anytime prior to printing EDO forms and save changes to resume later by clicking the 'Pause' button.
- Ability to launch Workflow following the completion of EDO and provide effortless navigation to the selected customer/member relationship management summary window.

ProSign Online (eSignature)

ProSign Online is new functionality to improve and scale the electronic signing experience of all parties involved. It will contribute to the well-being of the environment by cutting down on the amount of paper used per origination process and reduce the operating cost of paper and storage.

This feature reduces the turnaround time of the signature ceremony, streamlining and increasing the efficiency of the end-to-end process; addressing the evolving needs of your customer/member.

Furthermore the additional integration with DepositPro, allows Financial Institutions to mark all document/s to be sent via ProSign Online, providing the tool to customer/member to sign the documents both remotely and/on premise.

ProSign Online offers a secure portal for document exchange and authentication with the use of additional security questions, before the customer/member can complete the signature ceremony.

It provides the ability for Financial Institutions to monitor the status of completion for each document by individual recipient, giving full visibility of any outstanding steps that are in need to be completed before the signature ceremony.

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top 100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at finastra.com

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