

## Enhanced Deposit Account Origination for PhoenixEFE® Core Featuring 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. It's a fact that customers are most receptive to new offers during the early days of onboarding.



Enhanced Deposit Account Origination for PhoenixEFE® Core Featuring 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 in under five minutes, eliminates consumer objections to changing their primary financial institution relationship.

Deposit Account Origination								Action																																					
DepositPro Information   Account Information   Interest & Club Information   Marketing Information   User Defined Fields								Update																																					
<b>DepositPro Information</b> Primary Acct Holder State: <input type="text" value="Florida"/> Account Type: <input type="text" value="Personal"/> Account Purpose: <input type="text" value="Consumer"/> Product Ownership: <input type="text" value="Joint (Right of Survivorship)"/> Product Category: <input type="text" value="Checking Accounts"/> Product Description: <input type="text" value="Free Checking Account"/>								Clear																																					
<b>Account Relationships</b> <table border="1"> <thead> <tr> <th>Include</th> <th>Name</th> <th>Relationship</th> <th>Parent Entity</th> <th>DepositPro Entity Type</th> <th>DepositPro Capacity Type</th> <th>DepositPro Title</th> <th>Signer</th> <th>Sign Alone</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Miller Enterprises</td> <td><input type="text" value=""/></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Jason R Miller</td> <td>Primary</td> <td></td> <td>Individual</td> <td>Holder</td> <td></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Victoria A Miller</td> <td>Joint Owner</td> <td></td> <td>Individual</td> <td>Holder</td> <td></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> Legal Name: <input type="text" value="Jason R Miller or Victoria A Miller"/> Format on Signature Card: <input type="text" value="Jason R Miller or Victoria A Miller"/> Title 1: <input type="text" value="Jason R Miller or"/> Title 2: <input type="text" value="Victoria A Miller"/>								Include	Name	Relationship	Parent Entity	DepositPro Entity Type	DepositPro Capacity Type	DepositPro Title	Signer	Sign Alone	<input type="checkbox"/>	Miller Enterprises	<input type="text" value=""/>					<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jason R Miller	Primary		Individual	Holder		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Victoria A Miller	Joint Owner		Individual	Holder		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove	
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								Get Acct...																																					
								Cancel Continue																																					

## 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 ChexSystems® and QualiFile checks\*
- Launches check ordering through Harland Clarke
- 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 DepositPro
- Presents compliant forms

### Driver's License Scanning Features

- Supported by Acuant (formerly CSSN) scanners
- Automatically reads and populates name, address, date of birth, gender, ID number and ID expiration date
- The image of the Driver's License or State ID can be saved to a folder where it can be retrieved and archived, or saved to the PhoenixEFE Core database

For more information about up-leveling your deposit account origination experience, contact your PhoenixEFE Core sales representative.

*\*Must subscribe to these services*

*\*\*Verify supported account types with a D+H representative*

Customer and Account Information

Customer and Account Information >

Customer and Account Information

Action

Accept

**Customer Summary**

**Miller Enterprises**  
Primary: 5407 Pine Cone Circle Lake Mary, FL 32746  
Home:  
Business: (407) 555-5407  
Mobile:  
Email:  
Start Date: 01/02/2000  
BSA Risk:  
Occupation:  
Employer:  
Security Info:

**Jason R Miller**  
Usual:  
Primary: 1402 Waterfall Way Lake Mary, FL 32746  
Home: (407) 555-1402  
Business:  
Mobile:  
Email: jmiller@email.com  
Birth Date: 06/07/1989  
BSA Risk:  
Occupation:  
Employer:  
Security Info:

**Account Summary**

**CK - Auto Generated (110 - Free Business Checking)**  
Miller Enterprises (Primary)  
Jason R Miller (Authorized Signer)  
Open Date: 01/06/2015  
DepositPro Account Type: Corporation  
DepositPro Product Ownership: Corporation  
Title 1: Miller Enterprises

**CK - Auto Generated (102 - Free Checking)**  
Jason R Miller (Primary)  
Victoria A Miller (Joint Owner)  
Open Date: 01/06/2015  
DepositPro Account Type: Personal  
DepositPro Product Ownership: Joint (Right of Survivorship)  
Title 1: Jason R Miller or  
Title 2: Victoria A Miller

1. Customer 2. Account 3. Summary 4. Services 5. Print Cancel

800-815-5592

dh.com

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