

Vision Suite



Credit Union & Banking ECM Solutions

In today's drive to always deliver better member and client services, Electronic Content Management, "ECM," has become a necessity. Whether your needs revolve around improved loan workflows, teller services, or member engagement, CDI has solutions to improve your content management. CDI's Vision Suite integrates with the ECM solution, Laserfiche, and most core data processing systems.

The Vision Suite

The Vision Suite offers one-click lookup of primary or joint owners' IDs, membership cards, or documentation. Scan IDs at the teller window or capture Windows or core processor print streams. Easily index IDs by reading barcodes when scanning.

Check 21 Solution

- **Teller Scanning** - Scan single checks or batches to balance with each transaction. Capture MICR, CAR & LAR amounts with automated and manual verification options. Import deposit checks from ATMs, ITMs, and RDC. Automatically store balance reports for the teller, branch, or institution prior to generating your cash letter. Automatic

cash letter submission with most clearing institutions. Import received and cleared checks into Laserfiche using standard formats such as X9.37.

- **Receive** – Import inclearing items to your repository from the FRB, generate a summary report, and create MICR/ACH posting files for your core system.
- **Return** – Mark inclearing checks for return to BOFD and create return a cash letter file for submission to the FRB.
- **IRD Reprint** – Allow printing of legal document replacements, return to the institution of first deposit once final NSF is complete.
- **Advanced Fraud Early Warning** – Enable real-time fraud lookup through Vision Check 21 integration (requires subscription).
- **Merchant Capture** – Enable business customers to scan and deposit checks from offices and submit to their financial institution with an Image Cash Letter (ICL).

Member Portal – Client or employee document portal for quick document access of receipts, checks statements, or other documents. The portal interface is customizable and secured with enhanced security. It may be hosted locally, through a CDI hosted interface, and accessed through third-party home banking solutions.

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The Power of Vision

Receipt Capture System – The cash matrix balances tellers' cash with each transaction. It provides the option of receiving an emailed receipt, with all account numbers automatically masked. Integration with Vision Check 21 to combine receipts and checks into a single document for research and member lookup. It offers touchless authorization by sending a text message for members to acknowledge and sign electronically during cashback requests at drive-thru or call centers.

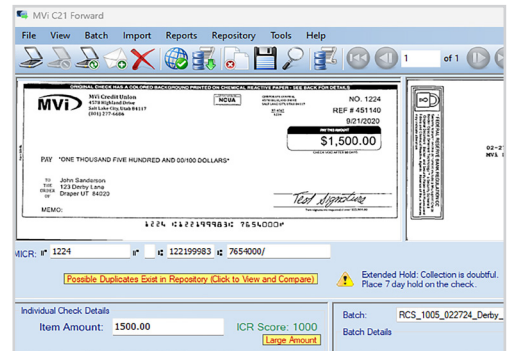
Signature Pad Marketing – Manage and display color marketing graphics and messages on your color signature pads.

MARS – Archive & retrieve COLD data from computer-generated reports, statements and invoices. Capture, index and archive directly into Laserfiche. Apply graphical overlays to enhance the readability of green-bar reports.

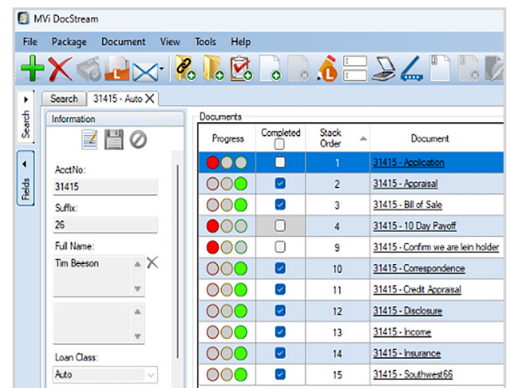
DocStream – Manage document packages and track the collection to completion. The application is used to track percentage of completion of loan packages, new account openings and even human resource onboarding documents. Use pre-built templates with to-do lists or ad-hoc packages. A dashboard shows real-time package status.

Laser Check Capture – Laser print checks on blank check stock with signatures (cashier's checks, money orders, etc.). Allows granular control over authorization limits and remote approval of checks. You may also create core and user-generated loan coupons along with certificate renewal notices.

Check 21 Forward - NSF and fraud detection



DocStream - track loan package progress



Receipt Capture System - email or text receipt with biometric capture

