

Completing application for cards support

An intuitive, clearly structured entry mask in Quipu Core Banking used to select an account and register all the necessary data to support the card application process.

The application is an easy-to-use partly-completed form used to:

- select the account to which the card application is linked
- choose the card product being applied for
- fill in card details, such as card type, name on the card, security question and answer
- select the commission account, i.e. the account to which the maintenance fee will be charged
- select the card holder (in the case of companies)

Main features:

- Record and confirm all card applications using a single form that is easy to fill in and update.
- Use the multi-field search tool to select an account and a client from the respective database and attach them to the card application.
- Select from a freely customisable range of card products offered in different currencies.
- Define which information is mandatory for completion of the application.
- Predefine links between cards and specific target groups to ensure that clients are not offered cards for which they are not eligible.
- Print out the card application data to be signed by the client.
- Record security checking information for use by front office or call centre staff, e.g. security question and answer.
- Record the client's preferred statement delivery method (e.g. collection at the bank, sent via email, sent to home address, sent to work address).

- Define the range of pop-up messages which front office staff can select in order to pass to the other system users.
- Offer cards with the 3-D secure function.
- Connect multiple accounts belonging to the same client to one debit card.
- Restrict the number cards per client by product and/or currency.
- Put together special product packages to meet the financial needs of specific client categories (e.g. wage earners, pensioners, small private enterprises.) and define whether a card should either be a mandatory or optional component of the package.
- Enable separate cards to be issued to each holder of a joint account or company account.
- Use different conventions to distinguish between financial institutions and companies/institutions (registered as bank clients), in order to manage the products only offered to certain categories of employees, e.g. cards issued at a reduced fee to the employees of a company.
- Register products with special conditions, such as cards for employees of financial institutions.