

CorPoint®: Order Manager

Next-Generation Cash Management for Your Merchant Customers

Manual cash ordering processes are time-consuming and inefficient for both your institution and your customers. New technologies are available that save time, improve cash control, generate fee income and provide a clear competitive advantage.



Streamline Cash Orders for Merchants

The cash ordering process should be streamlined, automated and simple—allowing your merchants to get back to running their business. The process should also offer your customers both control and convenience while providing your institution with opportunities to boost the bottom line.

For many retailers, however, cash orders are still made via faxes or phone calls. These methods are time-consuming and do not give your customers the tracking, forecasting, reconciliation, accountability and mobile options needed to efficiently manage their finances.

Managing cash orders for your merchant customers also challenges your organization. While you would prefer to offer an automated solution that increases account visibility and control, you may lack the IT infrastructure to do so. If cash orders are outsourced to armored carriers, this does little to strengthen customer loyalty and brand recognition.

Control and Convenience with CorPoint: Order Manager from Fiserv

With CorPoint: Order Manager, institutions of any size can provide simplified cash

management services to their merchant customer base. The solution automates cash ordering to increase efficiency, accountability and control while reducing risk. It enables your customers to order cash via a bank-branded Web portal, mobile smart phone or automated telephone system. This establishes a common, single point of access for your customers, regardless of the cash vault location servicing their location.

Order Manager can be configured to automatically verify credit limits and balances prior to cash shipments, forecast order amounts, post debit entries to merchant accounts, track deposits and electronically pass order details to cash vault operations and third-party transportation providers for fulfillment and delivery. Merchants can access Order Manager around the clock to check order statuses, pull order history and obtain reconciliation data.

The Order Manager Advantage

Common Platform – Although your customers' cash orders may be fulfilled by a variety of third-party providers, Order Manager strengthens customer relationships and improves your service by providing a single point of access for cash orders under your own brand. All of your customers use the same toll-free number, smart phone application or bank-branded Web portal regardless of their location. With Order Manager, changes to third-party cash vault providers are transparent.



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization, and leading the transformation of financial services technology to help our clients change the way financial services are delivered. Visit www.fiserv.com for a look at what's next now.



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Efficiency – Order Manager allows you to offer merchant customers the convenience and control of managing their cash orders and tracking deposits 24/7—even for multiple locations. In addition, the system features self-service user management and standing orders to save time and increase productivity.

Visibility – Order Manager offers your customers a central view of multiple locations, while flexible configuration options enable your bank to manage corporate profiles by location and organization levels with less manpower and full audit tracking.

Reduced Risk – The solution allows you to enforce credit limits at the location or corporate level, capture and post customer account information, and utilize flexible approval workflows.

Forecasting – Order Manager can forecast cash order amounts for each order location taking into consideration seasonality, special events and denomination mix. Retailers can review forecasted amounts through a multi-tiered workflow and approval process.

Accountability – Retail organizations can manage order and deposit information from their desktops with access to advanced and automated management reports and dashboards for greater control and visibility.

Revenue Opportunities

Order Manager can help your institution differentiate itself and increase market share. It introduces a variety of revenue opportunities while enhancing your ability to offer valuable new services to merchant customers, such as:

Key Benefits

- Convenient Web-based and automated telephone cash orders
- Order and deposit history available 24/7 through a Web portal
- Reduced risk through credit-limit and balance checks
- Centralized view of order and deposit activity across different locations
- Enhanced notifications and communications between customers, your bank and armored carriers
- New source of revenue and differentiation

- Cash forecasting
- Deposit tracking
- Mobile cash ordering
- Email notification alerts
- Dashboards and reporting
- Order and deposit history

Powerful Cash Management Solutions

As the only provider with consulting expertise and technology solutions across the entire cash supply chain, Fiserv is uniquely positioned to help your organization drive down costs, improve revenues and promote customer acquisition and retention. Our commitment to delivering the leading customer-centric technology and services makes us your ideal partner for cash and logistics management.

Connect With Us

For more information about Corpoint: Order Manager, call 800-872-7882, email getsolutions@fiserv.com or visit www.fiserv.com.