

Subscription Management With AllData® PFM

Help Consumers Take Control of Their Finances

Some studies suggest that consumers spend an average of over \$400 per month on subscription payments – everything from gym memberships to publications to software subscriptions. Although some of these subscriptions may no longer be used, consumers don't always have visibility into these to know what could be cancelled, resulting in needless, recurring spending.

To address this problem, we've enhanced our account aggregation solution AllData PFM to include tools that help consumers manage subscriptions along with their other financial accounts. The additions enable your financial institution to provide customers with better visibility into spending and more informed control of personal finances.

Subscription Management Dashboard

AllData PFM now includes a dashboard widget that displays the consumer's recurring subscriptions. Using our categorization engine, the solution captures consumer transactions with third-party providers that fall into a subscription category, such as recurring payments to a gym or subscriptions to online publications.

Helping Consumers Save Money

Once they see their recurring transactions, many consumers are surprised they are still paying monthly for services they initiated only on a trial basis, months or even years ago. Summarized and presented in an easily viewed table, this information gives consumers the awareness they need to take action that may save them money.

Added Financial Insight

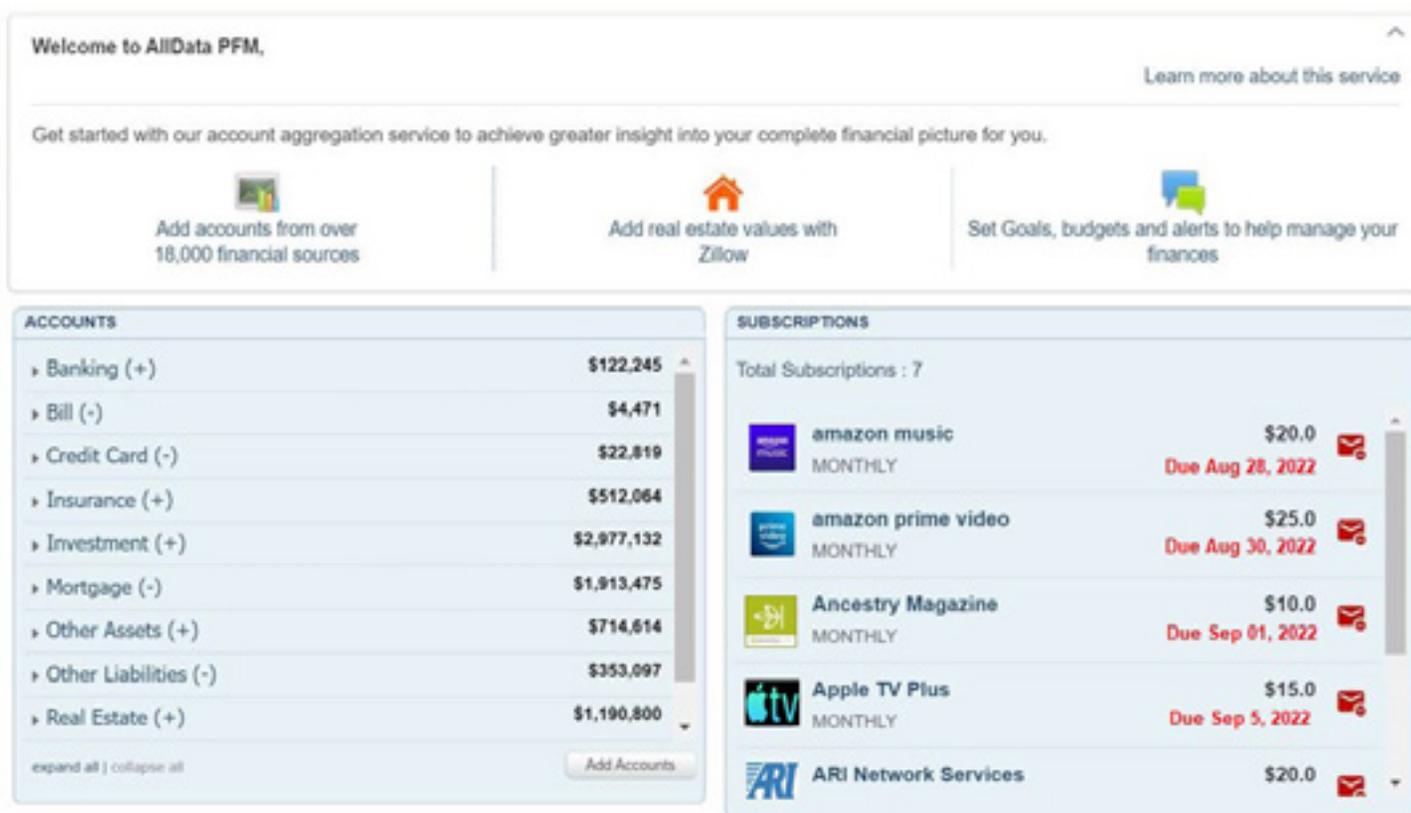
Consumers are increasingly looking for actionable financial insight from their financial institutions. In the area of subscriptions, AllData PFM can help provide it. Through the solution, customers are presented with a list of their subscriptions, along with payment schedules and amounts.

Consumer Control

Users are also able to edit subscription transactions they see within the dashboard. They can add or delete individual providers by simply changing the category flag on the specific transactions, which will then roll over to the display widget on the home screen.

Simple Installation

Installation of the subscriptions dashboard widget for your customers is straightforward. Once you execute a Service Add Form, a simple configuration change can be made on the AllData PFM side to create categories and display to your users.



Example of the Subscription Management dashboard in AllData PFM.

Connect With Us

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