

DOVELINK BUSINESS

SERVING CREDIT UNIONS SINCE 2001

WE MAKE OUTSOURCING EASY!

Solutions and Services Overview



“Where Commitment Empowers Vision”

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What's New or Enhanced for 2024

Enhanced PowerOn Catalog (POC)



Our PowerOn Catalog (POC) has been around since 2010 assisting credit unions in better understanding what is being used, what is needed and most importantly what can be archived. Most credit unions have thousands of specfiles with very little knowledge about them. Using the PowerOn Catalog paired with SQL Server gives you a tool that enhances the understanding of all the specfiles.

The new PowerOn Catalog has a revised utility that streamlines updating specfiles to have a date, time stamp for the last time the program was executed along with who ran it. This tool is useful to managing this critical data needed for understanding the PowerOns that are being used.

The DoveLink Business team does all the “heavy lifting” handing of to the credit union a tool that can be used for years to come.



Job File Catalog (JFC)

Now DoveLink Business is offering a similar tool for job files called the Job File Catalog (JFC). JFC is like the POC having a utility that efficiently analyzes all job files returning valuable information on the job files in the core system.

Enhanced Executive Dashboards



DoveLink Business revamped the Executive Dashboard solution to make it easier and more efficient. The improved solution is ready now in 2024.

Now Dashboards easily integrate with the DoveLink Business middleware platform Genesis.



Enhanced Genesis Middleware

Since launching Genesis back in 2018 this middleware platform has been instrumental in rapidly developing sophisticated solutions and integration of numerous third-party vendors. Now available for 2024 Genesis has new security features making it the most secure and robust development platform available.



New Options for CCUR

DoveLink Business offers a flexible subscription plan for outsourcing projects that provides an ample number of hours to cover most all projects needed by the credit union. A credit union having CCUR in essence augments their staff with a team of over two dozen experienced professions. CCUR goes beyond programming by offering unique services to manage the core and efficiently transform day-to-day processes. At DoveLink Business we are confident that your credit union will quickly understand the value of this type of partnership.

Regardless at DoveLink Business our goal is that you empower your vision with our commitment of excellence. Therefore, we have a few options for CCUR to assist your credit union in evaluating the true strength of this subscription plan.

**** NEW ** CCUR 6-Month Trial** – using the 6-month trial a credit union can easily evaluate how CCUR can work from them at a fraction of the annual costs. The trial option does provide plenty of hours and benefits; but does have a few restrictions.

**** NEW ** CCUR Step-Up** – At DoveLink Business we take on the responsibility of ensuring that the credit union gets the absolute most out of their subscription. However, if at the end of the First Term, should DoveLink Business deem that the credit union needs more time to evaluate the credit union will be offered a Step-Up option. Basically, Step-Up is the middle ground between First Term and a full subscription.

FROM THIS →



TO →



Peace of Mind with Cornerstone CU Resources



DoveLink Business Overview

DoveLink Business began serving toward the end of 2000, officially launched as **DoveLink Business** in 2001. Initially, **DoveLink Business** provided interim “in-house” contracting for credit unions that were using Episys as their core. This evolved into more requests from other Symitar clients, requiring additional resources. After 18 months working as a single consultant, **DoveLink Business** made the switch in providing support for other credit unions. Around that same time a group of credit unions began with a user group that ultimately became SymEast. As you know, SymEast has grown into one of the largest user groups for credit unions using Episys. The first initial growth for **DoveLink Business** came by participating in one of the first SymEast meetings held on the river front of the St. John’s River in Jacksonville, Florida. **DoveLink Business** now serves more than 65 active clients; having served more than 100 clients in the last 21 years.

Enough about our history, we want to introduce you to the **DoveLink Business** of today. This booklet provides you with an overview of our most popular outsourcing options, Symitar services and custom solutions.

We Make Outsourcing Easy

DoveLink Business offers simple flexible outsourcing options assisting your credit union with an experienced team. The **DoveLink Business** team is ready and able to begin assisting with your ongoing list of projects. Credit Unions that have never worked with us can participate in our unique **Walk Before You Run (WBYSR)** program. Existing clients can choose to purchase bundled hours with **Principle Systematic Support (PSS)** or benefit from a flat monthly subscription with **Cornerstone CU Resources (CCUR)**.

We Provide a Variety of Services with a Symitar Focus

DoveLink Business goes beyond developing software solutions assisting our partners with a variety of tasks that they encounter over time. First, we can assist you with **mergers**. We have completed numerous mergers over the last few years.

Most being another credit union merging into Episys from another core. However, we also have experience in merging small banks into the credit union arena. For new partners the concept of a **“2 to 4 Digit Conversion”** is nonexistent; but for credit unions that have been using Episys for a long while, this is a very tedious project that requires a significant number of man hours to complete. DoveLink Business can help you with this too. Another popular service that we do often, is **onsite Process Assessments**. Like the JHA SymAdvisor™ process, DoveLink Business sends a team to meet with a credit union, interviewing staff members from various departments with the goals of making daily processes easier, more efficient, faster, and certainly more cost effective. These are only three of the many services that DoveLink Business provides. Other services include **core conversions, core upgrades, form standardization, database verification, training** and of course, **software solutions**. More to come further along in this booklet, so keep on reading.

We Build Flexible Solutions

DoveLink Business provides custom solutions using PowerOn®, Symform®, Symform PDF®, NetTeller® support, SymXChange®, Symconnect®, ARCU®, .NET, JAVA, Python and more.

Whether a simple report, a custom letter, or a complex software development project our team is experienced to exceed your expectations. We are not locked into building solutions based solely on PowerOn or other technologies rooted within the Episys core. We work very hard to think beyond the core.

One such way of going beyond is **Genesis** our middleware development platform. **Genesis** is where integration is reimagined. **Genesis** is at the origin of progress; it assists you and your members in experiencing a new reality of robust software solutions. **Genesis** is the foundation for an infinite number of possibilities.

Here is a short list of some of the unique solutions built on the power of **Genesis**:

- **Genesis FPS (OFAC Force)** – supporting batch and on-demand OFAC Screening.
- **Genesis Ignite** – provides the integration of FIS® ChexSystems® within EMA® and EAR® or other custom applications.
- **Genesis Ignite Plus** – gives you the ability to integrate FIS® BizChex®. DoveLink Business is one of a very few companies certified to offer this service for our partners.
- **Genesis Login Assist** - online self-service for managing passwords for online and audio access.
- **Genesis JHA Wire Integration** – streamline OFAC screening within the JHA Wire module utilizing the foundation of Genesis.
- **Genesis Formlocity** - A solution that brings a creative versatility to stand-alone forms, custom batch letters, notices and marketing campaigns that leaves all others behind. Planned for 2022 the implementation of member statements being delivered via encrypted email and options to host statements online.
- **Executive Dashboards** – a PowerOn based solution that allows you to generate important dashboards for C-Level Executives without the hassle of working with a huge day behind data warehouse.

To learn more about our solutions, including those based on PowerOn keep exploring this booklet, or give us a call. We look forward to hearing from you soon!

DoveLink Business Outsourcing

Let us skip the small talk and jump into the flexible outsourcing options that DoveLink Business provides.

Walk Before You Run

At DoveLink Business we understand that it is important to build trust with vendors. This takes time and often comes at a significant cost. Unfortunately, this relationship does not always turn out the way you planned. We understand the risk involved with a new vendor relationship, so we created a way for you to get to know us better with our unique **“Walk Before You Run” (WBYSR)** program.

Here is how it works! You receive **50** hours for a heavily discounted price from our normal rates. The hours are available for immediate use. **The hours never expire.** The hours can be used for pretty much any IT-related project. Every project is treated with the same level of professionalism and support. Full access to our online ticket portal. Project management with regular status meetings. All covered by a standard service agreement.



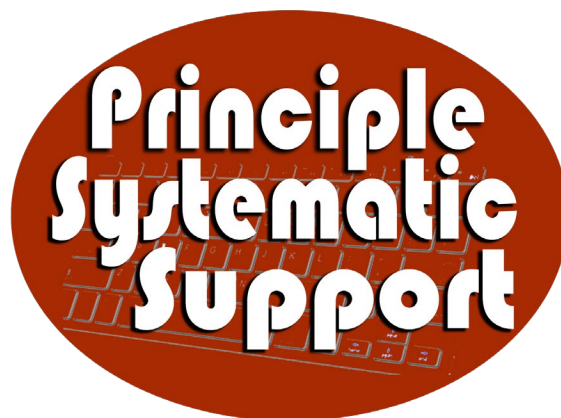
Principle Systematic Support

Principle Systematic Support (PSS) provides you with two features: First, the hours NEVER expire (none of this “use it or lose it”), Secondly, some of the best rates in the industry. The more hours you bundle the better the cost becomes!

PSS is a bundled hour outsourcing option. You can purchase a minimum block of 25 hours up to a maximum block of 300 hours. Blocks must be purchased in multiples of 25 hours. The hours NEVER expire and can be used for most any IT related task. Billing for the hours occurs at the point the Master Service Agreement is signed and any time you request a Statement of Work (SOW) for additional hours. If you require more than 300 hours, please contact our sales team to obtain more information.

Our rates for bundled hours are typically far less expensive than you will pay from other vendors. Our team is experienced with several members having over 20 years’ experience with Symitar. And some even having over 35 years in software development. We are more agile cutting through all the red tape providing fast turnaround on projects. We continue to address the needs of our clients by closing over 95% of our tickets in a timely manner.

Our partners will readily comment on the level of professionalism and integrity that we bring to our partnerships.




Cornerstone CU Resources

For less than the average cost of a single IT employee your credit union gains an experienced professional team for a flat monthly bill subscription option for outsourcing with **Cornerstone CU Resources (CCUR)**. Like **PSS**, **CCUR** provides you with flexible options. You choose which level best meets the needs of your credit union. Continue being member-centric by involving our professional services with **CCUR**.

CCUR offers two levels of service designed to uniquely meet the needs of your credit union. **CCUR Standard** offers additional services with up to 1200 usable hours for submitted projects. **CCUR Premium** gives you the best services still at a flat monthly subscription cost.

Cornerstone CU Resources											
PROGRAMMING SVCS	Standard	Premium	BUSINESS SVCS	Standard	Premium	SUPPORT SVCS	Standard	Premium	PACKAGED SOLUTIONS	Standard	Premium
SYMITAR DEVELOPMENT			BACK-OFFICE			SPECIAL PROJECTS & MANAGEMENT			CUSTOM SOLUTIONS		
PowerOn I/PowerOn II	✓	✓	Episys Back-Office		✓	Estimates prior to project start	✓	✓	Genesis Middleware ^{1/7}		✓
Symform Development	✓	✓	Database Verification Service		✓	Online Project Submission/Tracking	✓	✓	FPS with OFAC Force ^{2/7/8}	✓	✓
Symform PDF Development	✓	✓	Form Standardization	✓	✓	Monthly Status Reports	✓	✓	Monthly Cloud DB Usage		✓
Interactive NetTeller Specfiles	✓	✓	Process Documentation	✓	✓	Regularly Scheduled Status Calls	✓	✓	Ignite ^{2/7/8}		✓
Symconnect Development	✓	✓	Back-Office/Process Assessment		✓	Detailed Time Assessment	✓	✓	Ignite Plus ^{2/7/8}		✓
ARCU Development		✓	Merger Assistance ⁴		✓	FIS CheSystems/BioChev Integration ¹		✓	JHA OFAC Wire Integration ⁵	✓	✓
EMA/EAR/ELA Customization	✓	✓	2-digit to 4-digit Type Conversion		✓	Server Hosting for Solutions ⁶	✓	✓	Unique ID Management ^{2/7/8}	✓	✓
SymXChange Development		✓	OpCon Management/Training		✓	Detailed Project Plans when applicable	✓	✓	Calxy Integration(PATHPoint) ^{2/7/8}	✓	✓
PowerFrame Support		✓	Platform Conversion Support		✓	Statement Management via Formlocity		✓	Upstart File Processing Integration	✓	✓
			Third Party Integration ¹		✓	Dedicated Liaison from PCLT	✓	✓	Executive Dashboards ^{2/7/8}	✓	✓
						PCLT Requirements Support	✓	✓	Formlocity ^{2/7/8}	✓	✓
									Real-Time Fee Refund ^{2/7/8}	✓	✓
									Web Based SAP Clients (SAP,SAPH,SAF)	✓	✓
									AutoLink Processing	✓	✓
									LendKey Integration	✓	✓
									Zest AI Integration ⁸	✓	✓
CUSTOM SOFTWARE			TEMP STAFFING			CLIENT SUPPORT			POWERON BASED SOLUTIONS		
.NET C# Development		✓	Remote Staffing Support	✓	✓	Help Desk Support ²		✓	Basic Courtesy Pay	✓	✓
ASP .NET C# Development		✓	Onsite Staffing Support ⁴		✓	Onsite Custom Training ⁴		✓	Advanced Custom Courtesy Pay	✓	✓
JAVA Development		✓	Staff Placement Assistance		✓	Virtual Custom Training ⁴		✓	PowerON Catalog with SQL	✓	✓
JavaScript	✓	✓	Remote Software Development	✓	✓	Online Video Service		✓	Job File Catalog with SQL	✓	✓
JQuery	✓	✓	Remote Back Office Support	✓	✓	Video Production ⁴		✓	PowerON Catalog Date/Time Automation	✓	✓
Python Development		✓				Development (≥ 50 hours and ≤ 250) ⁴		✓	Custom Holiday Loan APP ⁷	✓	✓
SQL Server		✓				After Hour support ⁴		✓	Seasonal Skip-A-Pay (SAP) ⁸	✓	✓
Web Design/Development		✓				Dedicated Project Contract Support ²		✓	Skip-A-Pay w/ Hardship (SAPH) ⁸	✓	✓
						Solution Discounts ³	✓	✓	Skip-A-Pay w/ Emergency Disaster (SAPE)	✓	✓

<p>Footnotes for superscript designators 1,2,3,4,5,6,7,8</p> <p>1. Project may require additional software not included in monthly subscription</p> <p>2. Additional Cost not covered by subscription discounted 25%</p> <p>3. Requires Annual non-discounted license fee</p> <p>4. Restrictions do apply for maximum allowable support</p> <p>5. Standard discounts by CCUR subscription type: Standard 10%, Premium 20%</p> <p>6. Hosting plans vary - additional hardware 24/7 monitoring not included in base package</p> <p>7. One-Time Implementation discount 20%</p> <p>8. Requires Genesis</p>	<p>4 - Restrictions for Services and Products</p> <p>Only 1 merger support project with a 12-month term (must adhere to initial merger project restrictions)</p> <p>Onsite staffing limited to 2 days per 12-month term (does not include travel expenses)</p> <p>Help Desk does not include after hour support. (After hours support is considered DPCS)</p> <p>Onsite 1-3 day training or 2 virtual 3-day training per 12-month term (does not include travel expenses)</p> <p>Video Production now utilizes outside services cost vary on project</p> <p>Standard subscription maximum hours is 500, Premium is 1200 per 12-month term. Individual projects limited to 300 hours ea. Promotional terms apply.</p> <p>One on-site assessment project within a 12-month term (does not include travel expenses)</p> <p>Dedicated Project Contract Support (DPCS) falls outside the scope of CCUR subscriptions. However, with CCUR Premium rates are discounted</p>	<p>CHART LEGEND</p> <p>100% Covered by subscription unless footnote</p> <p>Discounted but additional charges are applicable</p> <p>Service or Product not covered by subscription</p>
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version 2024-02

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Larger comparison chart on the last page of the booklet.

Request an analysis of how CCUR compares to industry standards proving that it is the most cost-effective outsourcing option available. You will see from the analysis that CCUR is far less expensive than what the typical credit union pays a single IT employee. Then mix in the fact that CCUR provides you with an experienced team that can hit the ground running equates to a win for your institution.



Premium CCUR Trial **NEW in 2024**

Now for a limited time DoveLink Business is offering the “walk before you run” version of CCUR subscriptions call Premium CCUR Trial. CCUR is typically priced based on the asset size of the credit union, with CCUR Trial there a simplified approach in establishing the monthly subscription. Unlike the other CCUR options, CCUR Trial is for a 6-Month term. The simplified pricing and minimal commitment make it an ideal way to test drive CCUR. Due to the shorter term and reduced costs certain limitations do apply. The DoveLink Business team will be glad to assist you understanding all there is with Premium CCUR Trial.

First Term Premium CCUR

We are confident that CCUR is the absolute best outsourcing option available. First Term Premium CCUR provides your credit union with all the benefits of Premium CCUR at a discounted rate of 40% off the normal subscription.



How First Term Works! A credit union subscribes to CCUR using an initial 12-month term. Each month during the first term the subscription is discounted approximately 40%. At the end of the term, if the credit union does not agree that CCUR is invaluable, they simply cancel the subscription without any penalties. However, we are confident that your credit union will agree that even at the standard subscription price it is well worth the investment.

Premium CCUR Step-Up **NEW in 2024**

At DoveLink Business we understand that every institution has an extraordinary workload focusing on their members. While DoveLink Business works hard using our Project Coordinator Liaison Team (PCLT) to assist in every way possible, it comes down to a simple matter of “more time is needed for evaluation.” In these cases, DoveLink Business now offers a Step-Up of First Term CCUR giving the credit union another 12 months to truly build on the advantages of a CCUR subscription.

Dedicated Project Contract Support



Dedicated Project Contract Support (DPCS) provides your team with a dedicated developer / business analyst for a set number of hours and days for the duration of your project (DPCS is outside the scope of CCUR and is not included as a feature of CCUR). Over the last year many of our partners have needed temporary staff augmentation where they could depend on having a dedicated resource. DoveLink Business will enter into an agreement with the credit union to provide this type of support.

DPCS is typically a remote contract position, however, onsite DPCS support is available. Onsite is contingent to location, how often the contractor is needed, and the length of the project. Any onsite work requires that the credit union will incur the responsibility of covering all travel-related expenses. In the latter case, where travel is required, a good faith estimate is provided in advance of the travel.



A typical DPCS contractor will dedicate a set number of hours every day for the duration of the project. For remote DPCS support the contractor will work for a maximum of 6 hours a day or a total of 30 hours a week. Any contractor participating in a project for onsite work is required will be dedicated to the credit union's needs while onsite.

Included with the DPCS option is the ability for the credit union to establish after-hours support. After hour support occurs any time outside the standard operating hours of 7:00 AM to 7:00 PM Eastern, Monday through Friday. After hours contingent on availability with existing agreements.



“Per Incident” Support

Credit unions that require a small project estimated at 10 hours or less may choose the “Per Incident” option. Per incident rates are established on January 1st of each year (please contact sales for the current rate). The minimum number of hours for a per incident ticket is 2 hours. Beyond 10 hours PSS becomes a more viable option even with smaller short-term needs.

DoveLink Business Services

Merger Support

Since the banking crisis of 2008 mergers have become a common way to establish market share and provide exceptional services for members. Over the last few years our team has assisted in numerous mergers combining two credit unions into a single entity. We have successfully completed small mergers with a few hundred members with a hand full of shares and much larger, more complex, mergers. The larger mergers included thousands of members, savings shares, share drafts, certificates of deposit, IRA shares, various member types, payroll and

of course a variety of loans and cards. On average our team completes 3-5 mergers each calendar year.

We have a well-established project plan and a package of .NET programs and PowerOns that gives us the strategic edge in making sure that the merger is completed on time and accurately.

2 to 4 Digit Conversions

Imagine being an institution that has been on Episys for a long time. Despite the fact that Episys easily supports 4-digit types many credit unions still find themselves shackled to the old 2-digit scheme. Moving from 2 to 4-digit types is doable; but requires a significant amount of coordination and manpower. DoveLink Business brings this skill to the table and can assist you in getting to the 4-digit scheme allowing your credit union to continue to grow without the unwanted issues that come with running out of share and loan types.



Onsite Process Assessments

The DoveLink Business team has over 20 years of experience servicing credit unions of varying sizes and complexities. This has given our team the unique perspective of being able to see how tasks are completed by these institutions. With our Process Assessment we send a team to your credit union to interview your team and to see firsthand how your staff does their tasks. Within a short period after the visit, we will provide an Executive Summary and detailed report providing for you what we believe to be “Best Business Practices.”

This includes options on how to move from where you are today to processes that yield more efficiency allowing you to focus on what is most important, your members.

Our team comes to the credit union and interviews staff members from the Tellers on the front line to the C-Level Executives. Our approach is different from what many have experienced with a JHA SymAdvisor®. We provide a unique perspective by understanding how many of our partners are successfully completing daily tasks. The goal is to recommend “Best Business Practices” that can transform manual or inefficient tasks into streamlined processes. Interviewing all levels of staff members is important, allowing us to uncover even a small task that over time results in longer unnecessary hours.



Database Verification Service

You are probably already aware that bad data can make its way into your database. Bad emails, addresses, missing phone numbers, and the like. However, did you realize that critical data like Social Security Numbers, correctly spelled names and birthdates are just a few data points that we have found to be incorrect or missing. In fact, we have found that as many as 12% of the accounts in your database could be subject to bad or missing data.

The adage "Garbage In is Garbage Out," holds true to this inaccurate, incomplete, or invalid data. Did you realize that this type of erroneous data could affect the credit score for your members? Think about it! A member has multiple accounts where their name is entered incorrect at various FIs. All of this is reported to the credit bureaus resulting in aliases being identified for the consumer.

Our team comes in and analyzes your data the old fashion way by examining data records against documentation. There is no software that can correct these types of errors. Our team of analysts take the output from the analysis and manually examines documents within optical to determine what needs to be corrected. Ultimately your member benefits from these efforts to correct this critical data within your database.

DoveLink Business' **Database Verification Service** is a way to enhance the integrity of your database. We assist you in determining which critical data needs to be changed and then make those changes for you. Most of the errors we find are human error and most likely exist within every credit union's database. No one can evade the human factor causing inadvertent errors.



Onsite Custom Training

DoveLink Business has provided customized training for more than a dozen years. Some of the topics in training include PowerOn, Symform, Symform PDF, Symconnect, SymXChange and OpCon. Our courses include “Fast Track to PowerOn”, “Exploring SymForms,” “Practical Understanding of OpCon,” and “Managing Episys from the Back Office.” Clients can see the benefit of having training onsite at their office (we feel this is the most effective).

Once we know what we are training, we will take a project from your “to-do” list incorporating it into the training. Instead of having generic exercises, attendees are developing for a real project or task. Why not complete something from your list while completing the training? We think this is a very good idea!

Another unique thing about our training is that we make it fun. Before we build the curriculum and itinerary, we learn about who all will be attending. What they like to do, hobbies, special interests, etc. Next, we incorporate activities around these concepts to reinforce the training making it more fun for attendees. For example, in one training course we learned that most everyone loved to play cards. We developed a card game called “Symform Blackjack”. It was an instant hit! And yes, over the years this untraditional method has proven to be very effective in attendees retaining more from the training.

If you have a specific training that you need and do not see it listed here, please ask. Our team has a very diverse skillset and many years of experience to offer. If feasible we can work to build a curriculum specifically to meet your needs.



V-Training

V-Training (Virtual Training)

DoveLink Business now provides virtual training services with the introduction of **V-Training**. On-site training is still the most effective method for training. However, often scheduling with travel is simply not practical. Now with **V-Training** your credit union still benefits with customized training where participants can be geographically



dispersed. Courses include the same courses as onsite training. Here is a short list: Fast Track to PowerOn Development, Effective Knowledgebase Documents, Managing Processes with OpCon, Streamlining GOODNIGHT, Understanding the Power of Genesis, and Take Control with Formlocity.

Custom Video Training

Lastly, you can choose to have us produce video training that can be loaded on your intranet. We recommend this as a subsequent ongoing training after the initial session is complete.



Other Available Services

DoveLink Business offers other services that our partners have depended on our experienced team to assist or manage for them. The following list is some of the services that we have provided for other partners:

Core Conversions – We have been on the ground for new JHA clients coming onboard with Episys serving as a liaison for the credit union assisting in whatever capacity is needed. We have also worked with those partners that have chosen to move to a different core, leaving Episys behind.

Core Upgrades – Often our partners need assistance in upgrading from a different version of key components within Episys. We are able and ready to assist in ensuring that the upgrade process is managed and effectively implemented.

Form Standardization – Our team can assist you in bringing all your forms to a consistent standard. This is important for the purpose of representing your institution as well as those that ultimately become a programmed electronic form.

Symitar Support Overview

PowerOn Development

Of course, we all know that PowerOn is a scripting language used for Episys. DoveLink Business has seasoned and skilled professionals that have worked with PowerOn for over 21 years. Whether you need a simple report or complex project involving multiple PowerOns our team can exceed your expectations.

EMA/EAR/ELA Customization

Symitar introduced their Enhanced Member Application (EMA), Enhanced Account Revision (EAR) solution and the Enhanced Loan Application (ELA) to improve the workflow for staff members performing tasks within each of these critical areas. If you are familiar with these sets of PowerOn specfiles you will understand that they are very complex and often fall short of what you need from them today.

ARCU Support

DoveLink Business can assist you in building enhanced reports using ARCU, a database warehouse for reporting. Our team is experienced with SQL Server and SQ Server Reporting Services.

Symform / Symform PDF Development

DoveLink Business supports development for traditional Symform or Symform PDF a form-creation software solution created by Symitar. Our team has assisted clients in standardizing forms, building them in Word or Adobe Acrobat (depending on which type of form you need), and customizing the PowerOn code within the core.

Be sure to read more about Formlocity, a solution that simplifies electronic forms, notices, marketing, and letters. Soon managing member statements too.

NetTeller Support

NetTeller, Symitar's online banking platform, provides clients flexibility and some customization by utilizing specialized PowerOns called interactive specfiles. We have assisted dozens of clients in establishing online features for NetTeller and building custom PowerOn subroutines within the core.

PowerFrame Support

In keeping with the trends and technologies the DoveLink Business team is ready to assist you as you move forward with PowerFrame. As with most new technologies released the learning curve can, at times, be overwhelming. PowerFrame and microapps are no exception. The skills needed to be successful are not readily available for most credit union clients. As a result, conversion to the new platform can be time-consuming and costly. Our team is forging ahead with PowerFrame for our partners that have committed to this platform.

DoveLink Business has a simplified custom notice, letter, marketing, and form management system called Formlocity. Check out Formlocity on page 40. For a demonstration give us a call or drop an email.



PowerOn Packaged Solutions

PowerOn Packages

Over the course of 22+ years DoveLink Business has developed thousands of PowerOns for clients. Many become complete packages providing you with in-house PowerOn based solutions.

Here is a list of the most popular packages:

Skip-A-Pay – This package contains multiple programs managing skipped payment promotions for your credit union. The package includes a batch program to qualify members, custom batch reports, an on-demand user interface (UI) and an optional online UI. Performs any file maintenance automatically and supports institution specific parameters.

Holiday / Vacation Loans – This package gives you the ability to manage loan promotions throughout the year. The package includes a batch program to qualify members, custom batch reports, an on-demand user interface (UI) and an optional online UI. Performs any file maintenance automatically and supports institution specific parameters.

Courtesy Pay – This package is a set of 21 PowerOn specfiles that automate the process of managing overdraft tolerance within Episys while generating significant non-interest fee income. The specfiles use a configuration file that contains parameters that allow the credit union to adjust the solution without modifying the code. Additionally, DoveLink Business will include within the package hours that can be used to customize the entire solution to meet specific needs of the credit union. Clients using this package generate as much as \$50,000 (or more) in non-interest fee income.

The package provides reports, collection letters (generated at specified intervals 10, 21, 31 days, etc.), custom notices, activation letters and on-demand programs to perform additional FM for member preferences.

PowerOn Catalog (POC) **Enhanced for 2024**

Another PowerOn based solution that gives you the ability to effectively manage your custom PowerOn library. The specfiles used with the **PowerOn Catalog** can be used to determine which programs are being used and by whom. The PowerOn Catalog can help you understand how active reports are being utilized, as well as identify algorithms being used within programs, and thus, assist you in not “re-inventing the wheel”. It will also enable you to monitor programs and access data in “real-time”.

Aside from the purposes of why the **PowerOn Catalog** was first developed it has become a useful tool in preparing for major conversions, like switching from 2-digit to 4-digit types, converting to other platforms, etc.



Job File Catalog (JFC) **NEW in 2024**

Same concept, different tool! Our new **Job File Catalog** analyzes the hundreds of job files that every credit union has in the core. With **JFC** you gain a better knowledge of each job file, their relationships with each other, what PowerOns or

internal core programs they execute. Bring order to your credit union by using JFC and POC

Q2 SDK Development

DoveLink Business professionals are also skilled when working with other third-party vendors. Many credit unions using Symitar also use the Q2 online banking platform. If you are one of those FIs and want to provide customization to the online bank via the Q2 SDK, we have trained developers ready and able to assist you with this effort.



Custom Solution Development

Here at DoveLink Business developing custom solutions is the key to our business model. Our founder, Mark Christmas, has over 35 years' experience in software development. He attended Georgia Tech and worked for large corporations, like Sprint Corporation, before finding this niche market in supporting credit unions. Along with his expertise everyone on our team is well qualified and our senior developers have more than 20 years' experience.



Along with all this experience our developers have knowledge in a variety of programming languages and technologies combined to provide you with a superior development team. Our mission statement, ***“Where Commitment Empowers Vision,”*** says it best! Our commitment to you and your projects gives you the power to see your visions become reality.

If your projects require more than just PowerOn, our team has experience with Visual Studio, PyCharm, .NET, C#, ASP, PHP, Python, JAVA, C++, SQL and other widely used languages. We can develop within Episys and for web applications using HTML, JavaScript, jQuery, Ajax, and more. Our team understands XML used with SymXChange, JSON building solutions that are common within today's standard development platforms.





Genesis – Integration Reimagined **Enhanced for 2024**

Genesis is an advanced middleware technology platform that is allowing partners to experience a new reality in offering feature rich services for their members.

Genesis leverages the legacy of Episys bridging the gap to an infinite number of possibilities for the credit union. **Genesis** is at the origin of progress for your institution. The idea behind **Genesis** evolved from our existing partners who are constantly faced with emerging technologies that change quickly. Their goal is to serve their members by providing efficient and feature rich applications empowering their members to manage their financial success.

Genesis Integration Reimagined



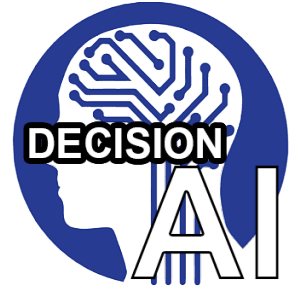
Genesis can be the foundation for complex solutions like onboarding members and/or originating and processing loans. Look at the picture on the next page of the booklet. Think of each module as a piece to a larger puzzle, where each piece

fits precisely with all the others to provide a more sophisticated and efficient method in performing key processes. Of course, in the center of the puzzle is the core that is critical in managing the data for each member.

Allow your imagination to soar! As your needs change **Genesis** can be the center of change allowing you to reimagine integration into Episys. **Genesis** is already the origin of progress for partners who have implemented the platform to complete a variety of solutions. In the following pages of the booklet, you will see some of the possibilities that became reality.



Genesis Decision AI



Artificial Intelligence is becoming more prevalent in almost every aspect of software when decisions need to be made quickly and efficiently. **DoveLink Business**, in conjunction with **Zest AI™** decision engine, provides loan decisions minimizing the overall risks for new loan applications.

The solution is invoked from with ELA inside the core. The first step is to gather critical data elements need to pull credit on the applicant(s) and pass the model requested, personal data and the credit data to **Zest AI™**. Multiple models are automatically returned, along with the credit report to the core.

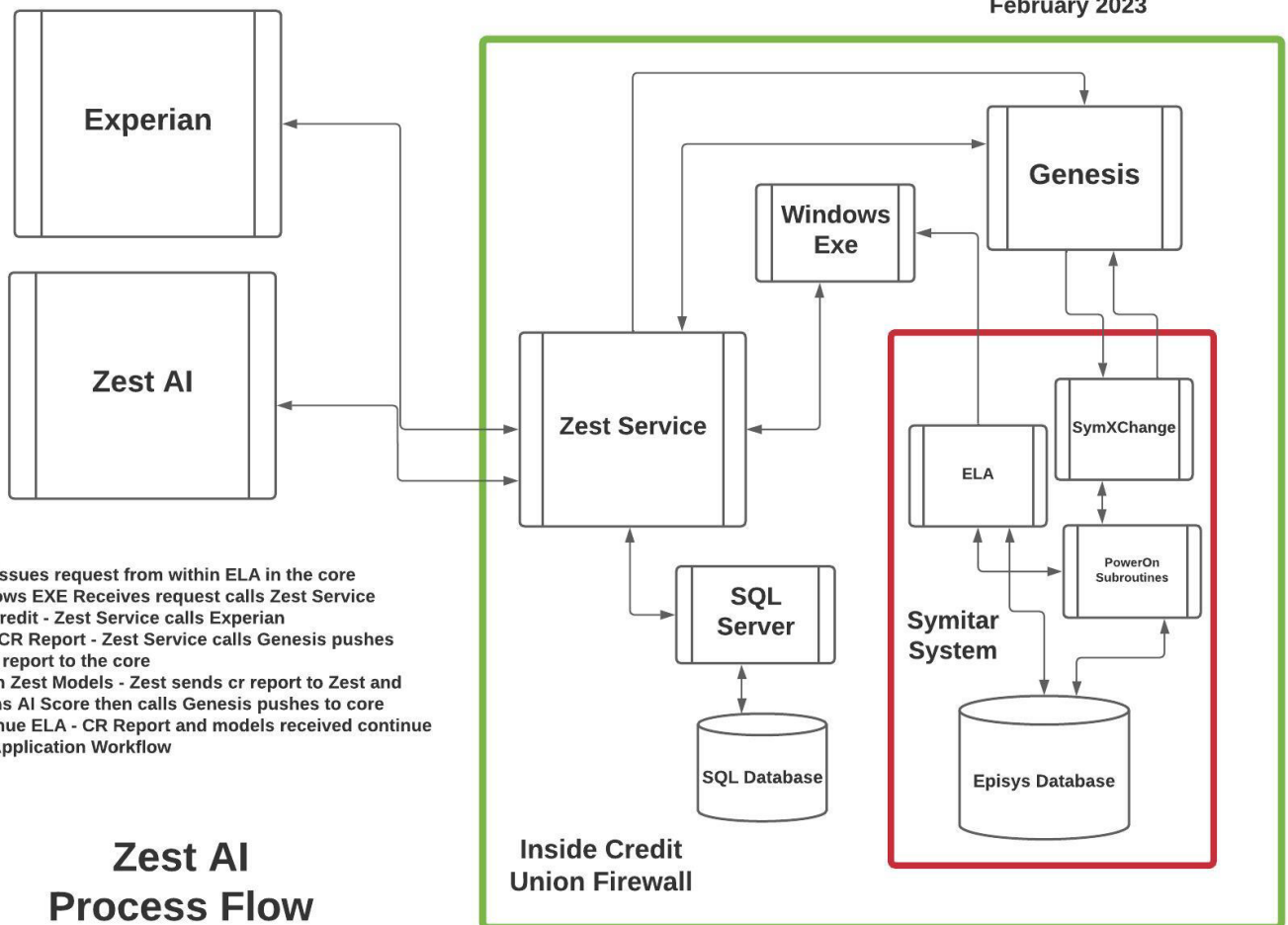


Genesis Decision AI fully integrates the revolutionary concepts of AI with the development power of Genesis streamlining the decision. The AI score can immediately approve or deny an application, while others are set to a pending

status within the application workflow. The solution provides the FI the ability to include additional business rules that are unique to the institution.

Utilizing the JHA Credit Retrieval system, Genesis Decision AI communicates directly to the credit bureau enabling the raw data from the bureau to be sent directly to **Zest AI™**. Once sent to the AI engine, the data is sent to the core via Genesis where it is then indirectly pulled into the core.

Community Choice
Zest AI Integration
DoveLink Business
February 2023



- User issues request from within ELA in the core
- Windows EXE Receives request calls Zest Service
- Pull Credit - Zest Service calls Experian
- Push CR Report - Zest Service calls Genesis pushes credit report to the core
- Obtain Zest Models - Zest sends cr report to Zest and obtains AI Score then calls Genesis pushes to core
- Continue ELA - CR Report and models received continue ELA Application Workflow

Zest AI Process Flow

Genesis FPS Service with OFAC Force

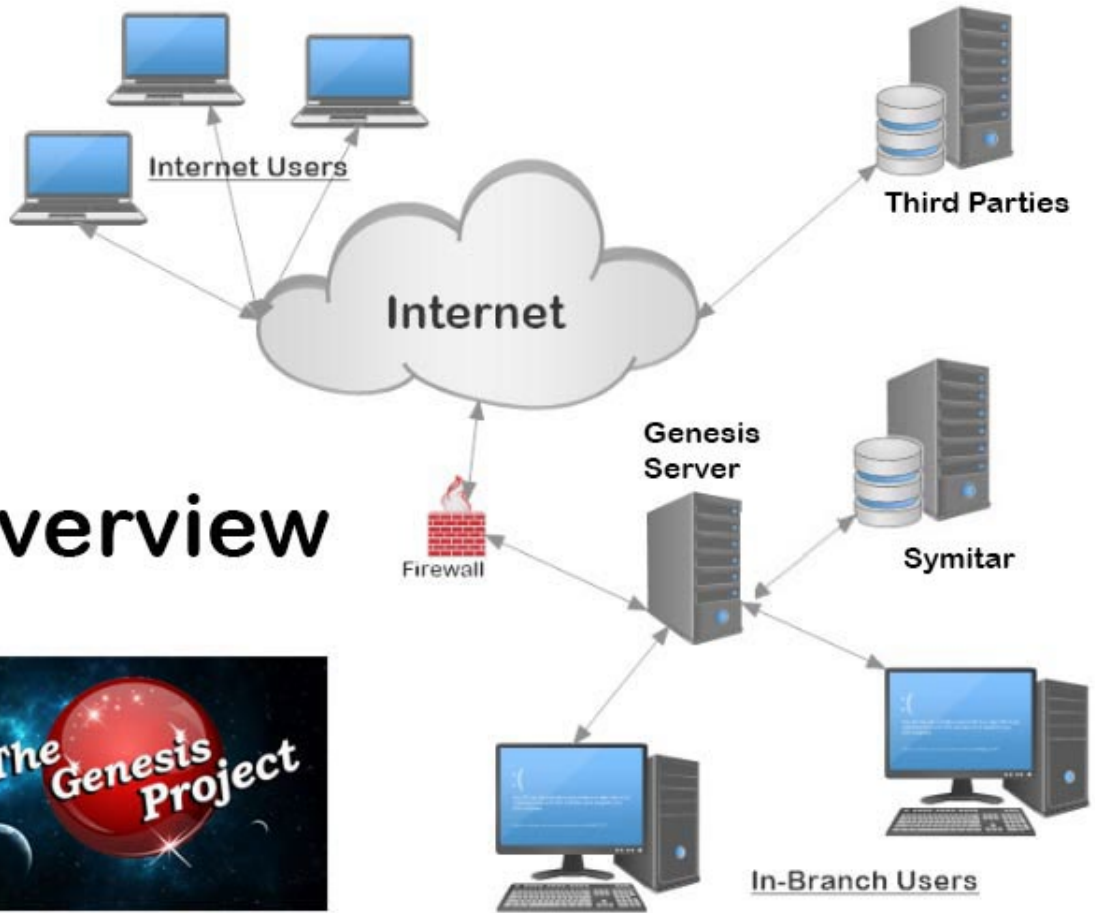
The first advanced solution released with the **Genesis** platform was the **Fraud Prevention Service (FPS) with OFAC Force**. **OFAC Force** supports on-demand and batch OFAC screening. Clients can select the screening performed using OFAC Watch provided by FIS. A second choice is clients can choose to utilize the DoveLink Business OFAC Cloud Database, or clients can choose to use screening methods from FIS and the DoveLink database.

OFAC Force can be completely integrated into core PowerOns such as those found in EMA and EAR. **OFAC Force** provides reporting for both on-demand screening and batch screening. There is no uploading data to an external computer to manually process your screens, then pulling it back into the core. You have the flexibility to have **OFAC Force** adapt to your credit union's needs.

OFAC Force also includes an "in-house" SQL Database that maintains every screen that is processed by **Genesis FPS**. Updates from the Department of Treasury are automatically completed without the intervention of your staff.



Overview



DoveLink
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Genesis Ignite

For clients that use FIS with QualiFile, IDV and IDA to manage and score when onboarding new members. **Genesis Ignite** is a ***solution integrating FIS QualiFile, IDV and IDA*** into the functionality within EMA and EAR. DoveLink Business is a certified FIS partner enabling our **Genesis platform** to efficiently incorporate these useful tools. ***If you don't use EMA or EAR let our team can extend Episys/Quest with this functionality uniquely customized to meet your specific needs.***

Included with the **Genesis Ignite** software, the DoveLink Business team will provide all the necessary customization for the EMA and EAR PowerOns. The solution utilizes SymXChange to manage the XML protocol in communicating between the core, **Genesis** and ultimately FIS. **Genesis Ignite** empowers your staff in automating decisions with QualiFile. It enhances verification of prospective members with Identity Verification (IDV). Minimizes the potential of fraud with IDA and complies with OFAC regulations using FIS OFAC Watch. Like **Genesis FPS**, requests are stored within a local SQL database for auditing purposes.

Find the power to ignite onboarding to a whole new level of efficiency.



Genesis Ignite Plus **Enhanced for 2024**

DoveLink Business is one of a very small number of vendors that is now certified to offer a solution for integrating FIS' BizChex product. **Jack Henry does not have BizChex on their roadmap to be integrated the same as QualiFile (ChexSystems). Regardless DoveLink Business can implement BizChex from within the Episys core providing the necessary information that you need to successfully onboard businesses or organizations.** Like QualiFile (ChexSystems), BizChex enables your staff to make substantiated decisions when onboarding non-consumer accounts. All the functionality backed by FIS can easily be integrated into EMA and EAR with **Genesis Ignite Plus**.

Included with the **Genesis Ignite Plus** software, the DoveLink Business team will provide all the necessary customization for the EMA and EAR PowerOns. The solution utilizes the **Genesis Platform** and SymXChange to manage the XML protocol with communicating between the core. FIS has launched BizChex and will not be supporting non-consumer decision tools not utilizing BizChex.

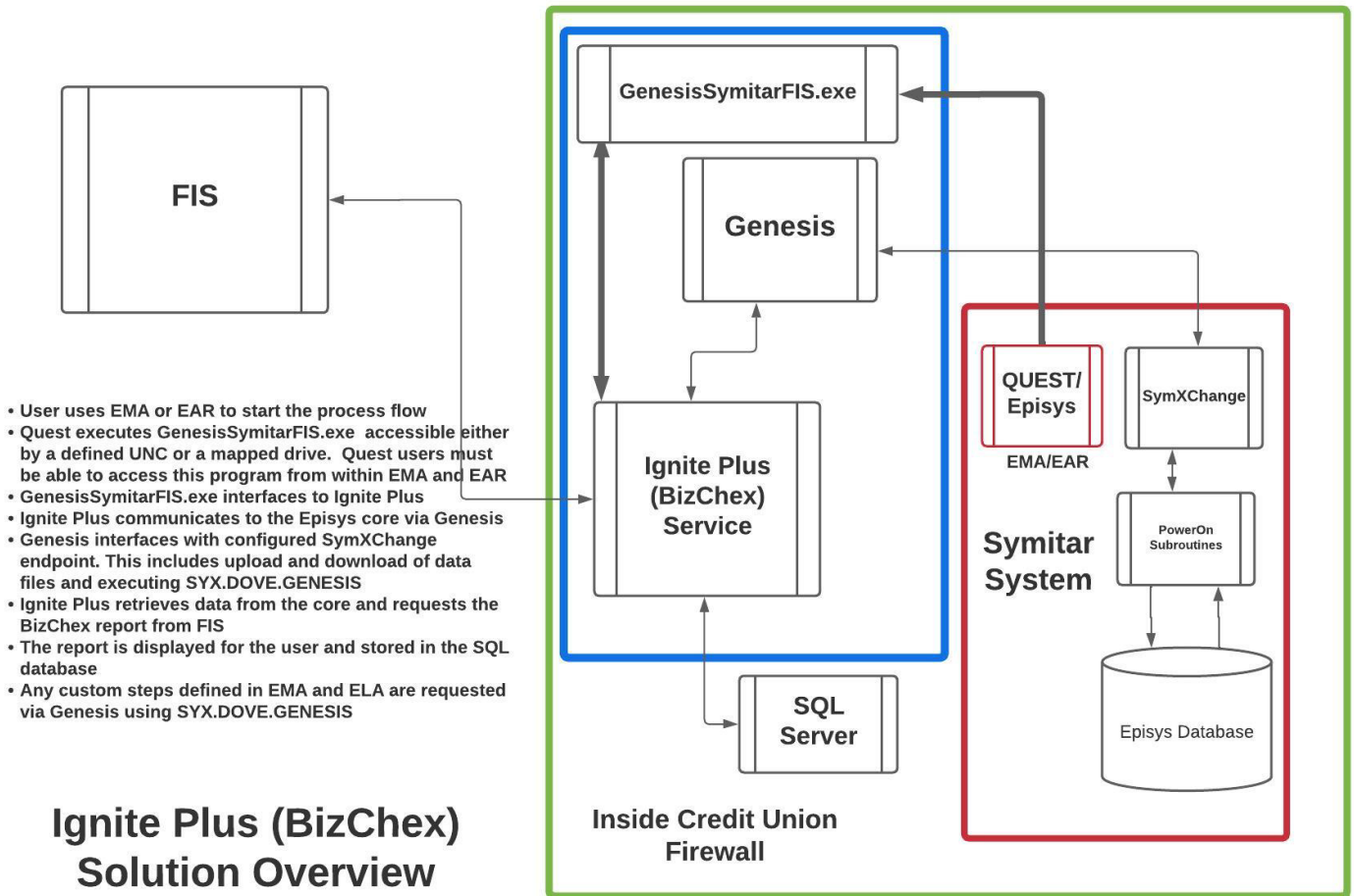
If you don't use EMA or EAR let our team extend Episys with this functionality customized to meet your specific needs.



Genesis Ignite and Genesis IgnitePlus have very similar process flows with the main exception being Genesis Ignite is directed toward consumer onboarding and

IgnitePlus is set for onboarding all types of business accounts. The following provides an overview of how these processes work.

DoveLink Business
May 31, 2022



Genesis Login Assist

Another useful tool to streamline daily tasks is **Login Assist**. **Login Assist** is a solution providing self-service setting up initial online access or password resets. It allows the member to opt-in for e-statements, audio, and other online services. Login Assist works with your existing online bank and is accessed by a URL to the Login Assist page.

The member can then enter an account number or their SSN to begin the validation process. **Login Assist** allows the member to have a verification code

sent to their cell phone. If they do not have or want to use their cell phone, they can enter a valid email address. If they choose not to use the 2-factor authentication by phone or email, **Login Assist** can still validate their identity using FIS IDA. IDA uses a series of questions and answers from the member's personal information. They are asked multiple choice questions to answer. The process will allow a second set of questions before abandoning the identity authentication not allowing them to continue.

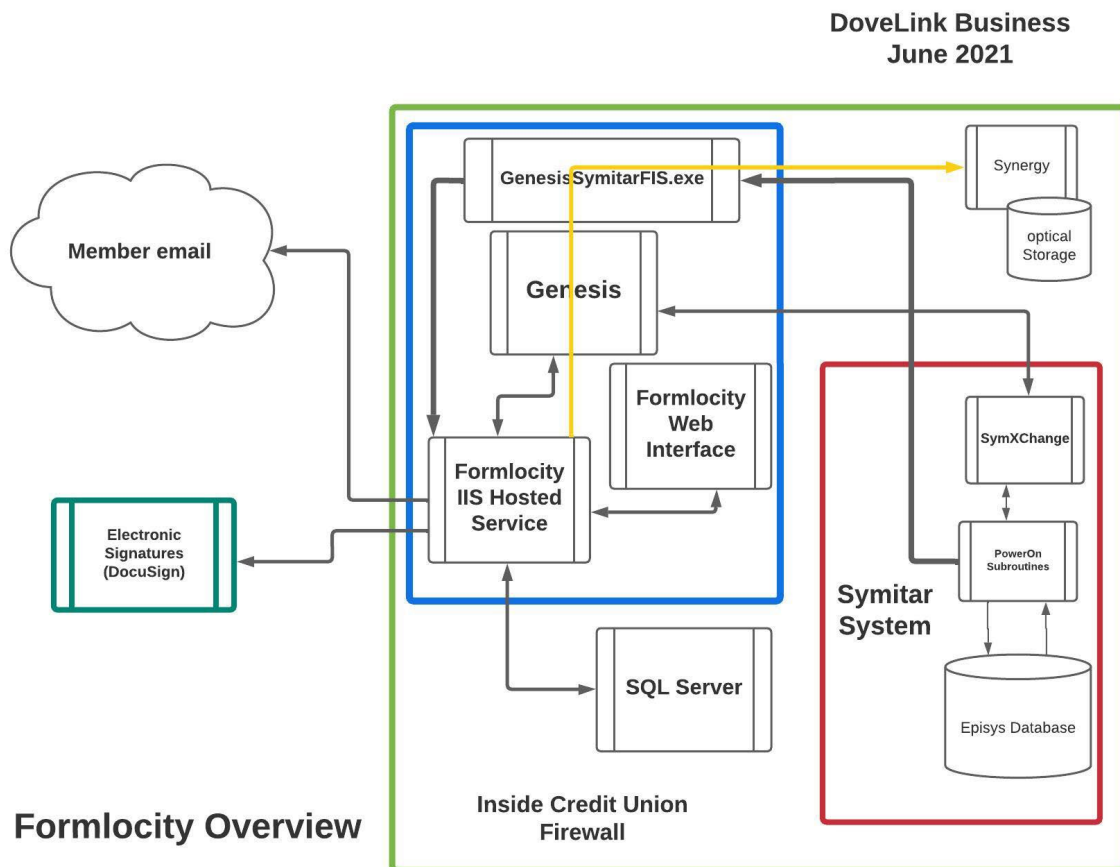
Once the member is authenticated then they can setup their online banking password and be prompted to opt-in or out to other services and productions.

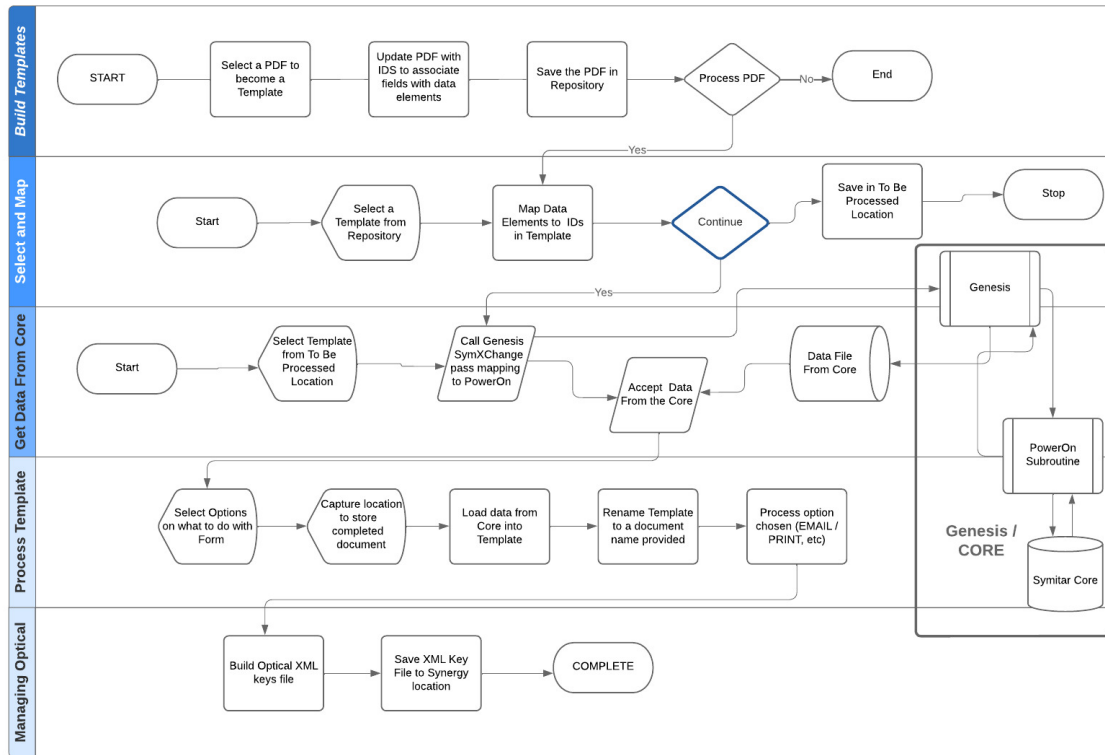


Formlocity Uncompromising Ingenuity **Enhanced for 2024**

Finally, a simplified solution for forms, letters, and notices. Built on the power of Genesis, **Formlocity**, is an exciting new solution changing the way you manage electronic documents. No more frustration with attempting to manage convoluted electronic forms, letters, and notices. You have been here before looking for a simple solution, one that is not too complicated, doesn't require new skills and only has minimal development needs going forward. **Formlocity** brings a new velocity to professional forms, letters and notices leaving behind all other solutions. And yes, this includes Symform and Symform PDF.

Contact us soon to gain access to videos demonstrating the power and versatility of Formlocity. You will see firsthand how this new solution will revolutionize your electronic forms, letters, and notices.





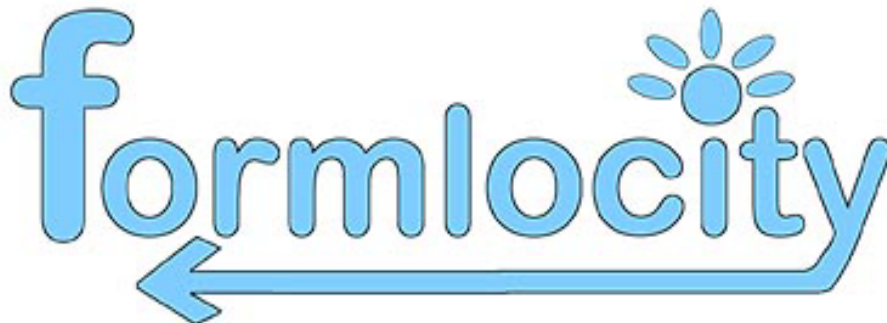
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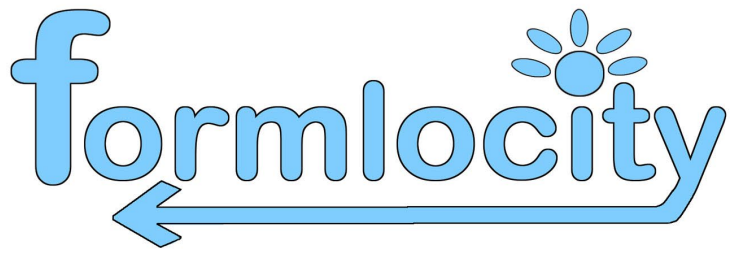
info on Formlocity check out these video links:

<https://dovellinkbusiness.com/Formlocity.mp4>

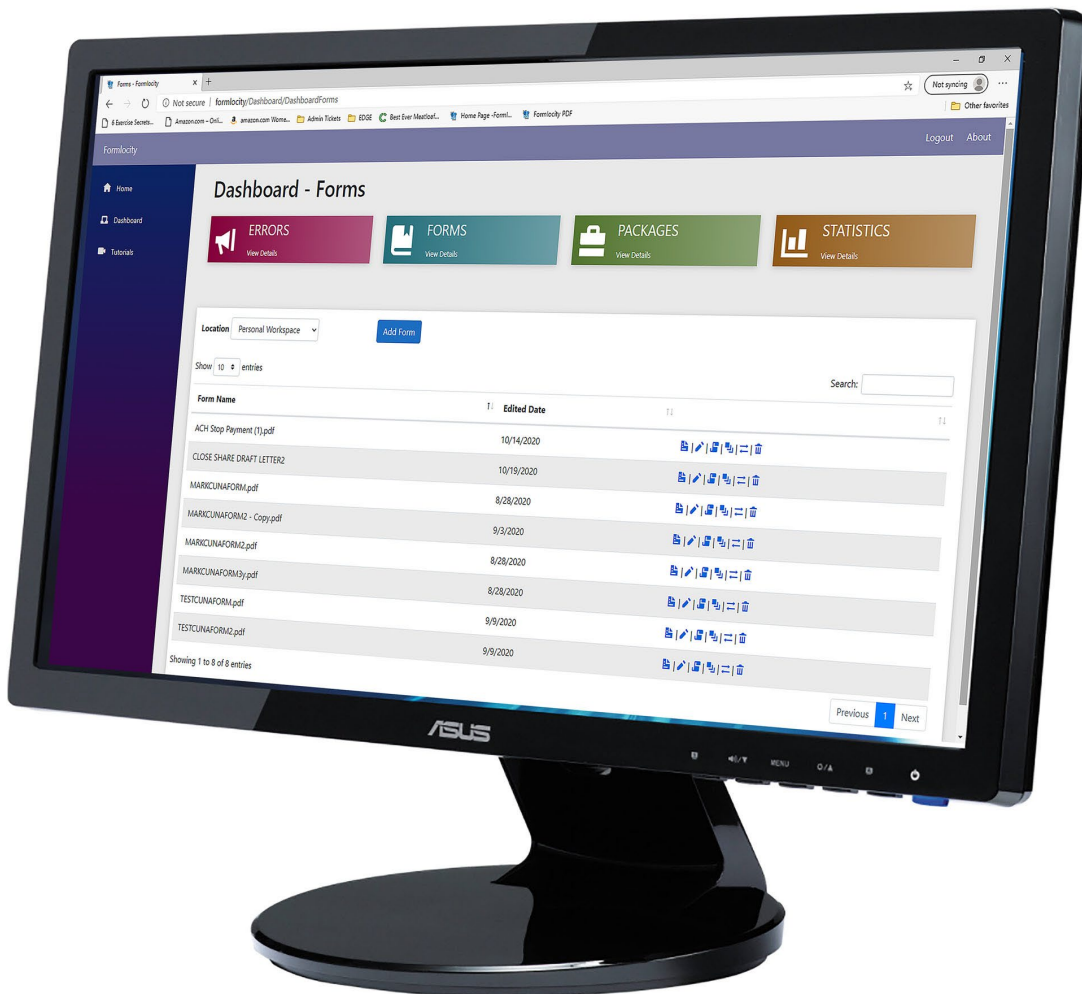
<https://dovellinkbusiness.com/FormlocityDemo.mp4>

Formlocity Statement Support – Utilize the power of Formlocity to deliver member statements directly to their inbox in a password protected email. Even choose options to host year of statement data in the cloud safely and securely.





Document management for batch letters, notices and stand-alone forms



Powered by
For more information visit our website at:
www.dovelinkbusiness.com
or call
(770) 227-4774 option 4

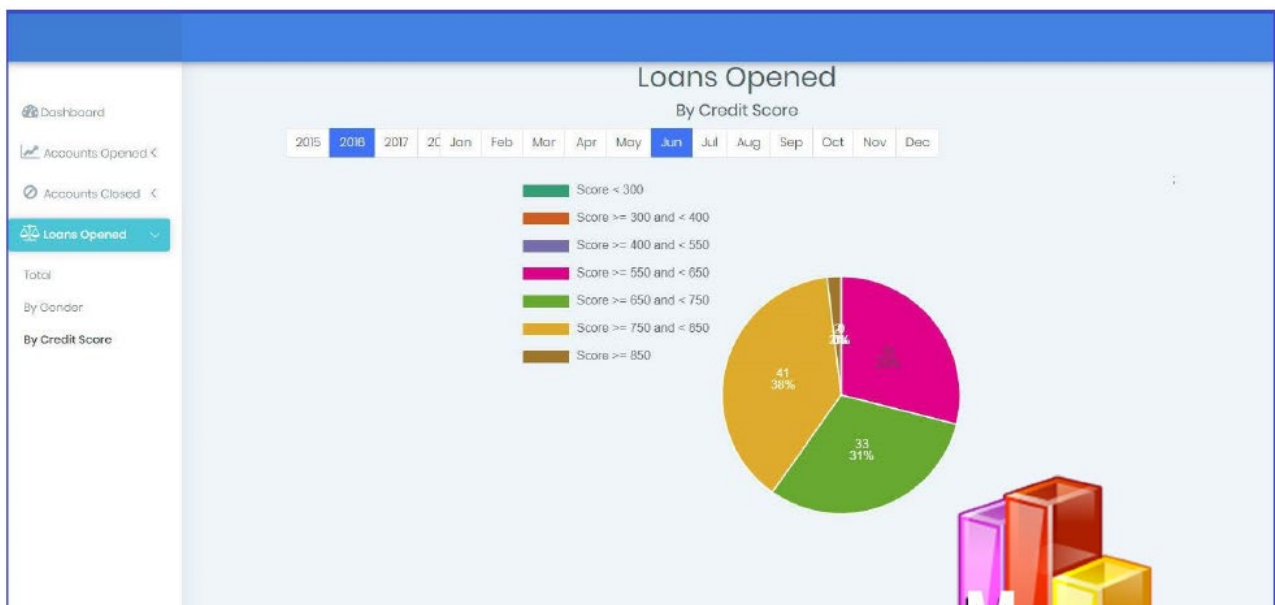


Executive Management Dashboards **Enhanced for 2024**

DoveLink provides a solution supporting easy to use dashboards that can be viewed on desktop computers, tablets, and smart phones. The **Management Dashboards** provide snapshots for your member activity, loan portfolio, accounting and more.

You can choose to drill down on the data to see more detail about the set of data you are reviewing. These snapshots are used by managers and executives to understand the performance of key indicators for your credit union.

These dashboards do not require an expensive data warehouse. You simply build PowerOns to extract the data, then import the data into the dashboard solution.



Other Genesis Solutions

Wire Module – Screen OFAC within the JHA Wire Module utilizing **OFAC Force** and Genesis.

Unique IDs for Fraud Prevention – Manage unique ids per member across the entire Episys database.

Calyx Mortgage Loan Integration – Process mortgage loans using Calyx and manage them within the core. Calyx PATH and Calyx Point are available.

Enhanced Executive Dashboards – Streamline our already versatile Executive Dashboards by interfacing to the core via Genesis.

Paysett ACH Solution – A unique ACH solution utilizing the Paysett foundation allowing members to generate ACH without help from the credit union staff.

SurePay Bill – Leverage real-time bill payments for your members with our web-based app integrated with the core via Genesis.

Real-Time Fee Refunds – Streamline refunding fees using a unique system that can notify approving staff in real-time even from a remote location.



Still in the Works

DoveLink Business continues listening to our partners to transform the way credit unions currently onboard consumer and business members and originate and process loans. With that in mind we are currently working on the following upcoming solutions:

Genesis Onboarding – One of the original pieces scheduled for Genesis will assist you in onboarding consumer and non-consumer members for in-branch and member facing applications. **Releasing 2nd Quarter 2024**

Genesis Loan Origination – Loan application can be a bit intimidating for your member making the application process difficult. However, originating a loan application with Genesis provides interactive help ensuring that the application is accurate and simple for the end user.

Fee Refunds – A “real-time” approval solution for refunding member fees utilizing a chat feature between your front-line staff and staff with higher approval limits.

Employee Tracking – A custom tool that allows you to track employees providing you with the ability to streamline your management processes.



Project / Ticket Support

PROJECT COORDINATOR LIAISON TEAM (PCLT)

At DoveLink Business we understand that having a partner for outsourcing needs can become another task that must be managed. Therefore, launched in early 2022, the PCLT team, whose sole purpose is to alleviate the stress of coordinating projects to our Development and Support teams, began aiding our partners.

PCLT RESPONSIBILITY

The PCLT is tasked to make sure tickets are not idle for unusual lengths of time. Should there be tickets that are not progressing as needed, then the PCLT Project Coordinator will escalate and see that the ticket moves forward in a timely manner. The Project Coordinator will assume the responsibility to work with whatever DoveLink Business team member necessary to see that a ticket progresses immediately. If there are issues that surface from either our partner or the DoveLink Business team member, the Project Coordinator will make sure that it is addressed and resolved quickly.

- For many partners finding the time or resources to scope out needs, build requirements, and submit new tickets to DoveLink Business can be a challenge. The PCLT Project Coordinator will be tasked to proactively work with our partner to assess needs among all the various business units with the primary goal of streamlining processes, increasing overall efficiency for the credit union.
- Members of the PCLT become the primary contact for each of our partners. Collectively, they can ensure any type of escalation needed and can authorize emergency projects that may surface at any time.
- As the PCLT finds items that they see need to be addressed, they will first provide an overview of the item and request approval before any item is submitted as a ticket. This process may also require some effort in establishing requirements for a reasonable estimate for the credit union.

UTILIZING THE PCLT

The following interactions between your institution and the PCLT will provide the building blocks for utilizing this important team as soon as possible.

- The Project Coordinator Lead will reach out to you first by email requesting to schedule a short meeting to discuss how best to implement this strategy for your credit union.
- The Project Administrator will also contact you by email to provide an overview of our weekly Active Project List and our end-of-month Project Summary Reports. The Project Administrator is responsible for scheduling meetings and addressing specific items as they relate to any open ticket.
- Once projects are in queue a Project Lead will then assist the credit union with scoping out requirements, providing any applicable estimates or Statement of Work documents and following up with the Development team.

AN EXAMPLE OF HOW THE PCLT WORKS

Whether your credit union subscribes to CCUR or has purchased a block of PSS hours our goal is to see that your experience with DoveLink Business exceeds all expectations. Here is one way that we envision how the PCLT can address this goal.

We recommend allowing the Project Coordinator to work directly with various business units at the credit union. The PC will build key relationships with staff and seek out any ongoing issues they might be having and how to better improve their day-to-day processes.

After understanding an object, the PC will reach out to the primary contact to determine if the credit union wants to proceed with meeting the need discovered. If agreed to move forward, then the Project Leader will work to scope out requirements and obtain an estimate. If needed, the PC will follow up with the estimate to ensure that the credit union wants to move forward.

ONGOING SUPPORT

Here are a few items that maximize ongoing support when utilizing the DoveLink Business team.

1. Regular Status Meetings – We all have a lot of meetings; but we feel a regular status meeting is critical for communication between our partners and the DoveLink Business team. Normally status meetings last 5-10 minutes and are scheduled weekly, bi-weekly, or monthly.
2. Active Project List – The Project Administrator will provide a weekly snapshot of all your projects with the Active Project List (APL)
3. SYM Access – While we do not make requirements as to how your credit union engages our team, we do recommend providing our team with some type of access to a test SYM for your credit union. This can be VPN, Splashtop, Logmein.com, TeamViewer, etc.
4. Escalating Tickets – You have complete control over your tickets including the ability to Escalate any ticket needing to go beyond typical priority levels.
5. Emergency Tickets – Some time you get something any that needs to be handled immediately. We ask that you provide justification for the emergency need and if approved resources will be diverted promptly to the ticket.



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