



Debit Card Roundup Summary

RoundUpTotalSlideOut.dnax
Extension Id: 30b07c54-a280-4f76-8000-8f2831440cc5

© 2019 Fiserv, Inc. or its affiliates. All rights reserved. This work is confidential and its use is strictly limited. Use is permitted only in accordance with the terms of the agreement under which it was furnished. Any other use, duplication, or dissemination without the prior written consent of Fiserv, Inc. or its affiliates is strictly prohibited. The information contained herein is subject to change without notice. Except as specified by the agreement under which the materials are furnished, Fiserv, Inc. and its affiliates do not accept any liabilities with respect to the information contained herein and is not responsible for any direct, indirect, special, consequential or exemplary damages resulting from the use of this information. No warranties, either express or implied, are granted or extended by this document.

<http://www.fiserv.com>

Fiserv is a registered trademark of Fiserv, Inc.

Other brands and their products are trademarks or registered trademarks of their respective holders and should be noted as such.

Overview:

The Debit Card Roundup Summary Slideout provides a quick snapshot of month-to-date and year-to-date totals of Debit Card Roundup deposit transactions.

Key Benefits:

The Roundup Summary allows both contact center and in-branch employees to instantly keep members up-to-date on how much they're saving in a given month or year. Previously, a member would have to either manually calculate with statements, balance changes, etc. Depending on transaction volume, such tasks can be arduous and ultimately inaccurate. Roundup Summary provides a simple shortcut to this data.

Processing:

The Debit Card Roundup Summary Slideout is located on the Relationship Profile screen. It performs a lookup based on the relevant Person/Org Number and subsequently displays the data in a table.

Screens:

Roundup Summary is accessed via Relationship Profile.

Navigation:

Relationships > Quick Inquiries > Relationship Profile > Debit Card Roundup Summary

Screen Appearance:

As Of Date	MTD Total	YTD Total
04/04/2019	0	110.11

Field Listing:

Field	Description
As of Date	Current Date
MTD Total	Total Roundup deposits (8DCD) month-to-date
YTD Total	Total Roundup deposits (8DCD) year-to-date

Additional Requirements:

Debit Card Roundup Summary requires Fiserv's "Debit Card Round Up" application.

Configuration Checklist:

Authorizations:

Debit Card Roundup Summary requires the Relationship Profile auth item (RS).

Revisions

Date	App Version #	Change
03/2019	1.0.0.8	Initial release.