



## Service Module

Properly managing service requests, calls and escalations is key in providing efficient and effective account holder service. The **Temenos Service module** brings together industry best practices and a standardized request management system to dramatically improve performance, reduce the risk of error, increase account holder satisfaction and ensure service-level commitments are met and exceeded.

### Centralize and Standardize Service Processes

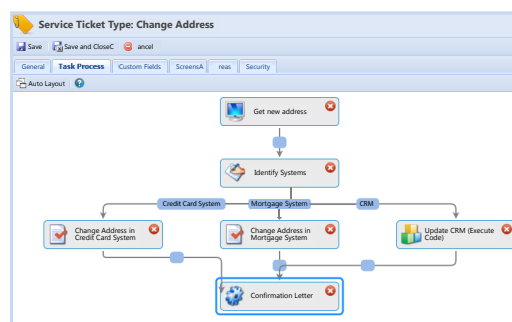
- Facilitate and track service calls and requests by creating tickets with clear, pre-defined tasks, driving standardization and managing the complete account holder service experience.
- Easily view all tickets related to the account holder, as well as any associated tasks. Attach ticket and task supporting documents in any format including Word, Excel and PDF.
- Automatically trigger and perform pre-defined actions every time a specified event occurs, such as when a task is completed or a field is changed.
- Bridge the gap between departments by automatically routing tasks for interdepartmental work.
- Synchronize the Service module with your existing internal processes by easily configuring out-of-the-box steps into the system.

### Easily Manage Technology Independent of IT

- Quickly react to market needs by configuring the system without needing IT or vendor assistance.
- Update the system to reflect new internal processes with intuitive configuration for service tickets, task processing, screens, fields, actions and more!
- Customize the software using the extensible architecture, open API or integration with industry-leading third-party providers to create behind-the-scenes automation, custom screens or custom panels.
- Easily link tasks and create dependencies with a simple drag-and-drop concept when configuring service tickets.
- Automate business processes and customize essential information with a selection of five available task types that can be used within every ticket workflow.

### Measure and Track Service Level Agreements

- Improve account holder satisfaction by monitoring start and end times for tasks and setting goals for task duration.
- Track overall task and service ticket status.
- Monitor performance with scheduled reports automatically emailed to executives and managers in either summary or detailed format.
- Gain transparency with data visualization by incorporating current benchmarks and service level agreements, tracking real-time progress and performance.
- Visualize and manage key information by using Microsoft SQL reporting services.



Take control of your service processes using Temenos' proprietary rules engine.



## Simplify the Efforts of Business Users

- Guide business users through tasks with step-by-step processing, driving consistent and repeatable performance.
- Expedite request completion by allowing multiple authorized users to simultaneously execute different tasks within the same ticket.
- Automate manual tasks by configuring the system to use rules to auto-select the appropriate result based on business conditions defined by your financial institution.
- Assign tasks that can be worked in parallel, and manually or automatically automate task assignment to multiple queues behind the scenes.
- Notify employees of new assigned tasks with queues, views and automatic email notifications.

## Optimize Business Communications

- Ensure timely completion of requests by assigning an escalation schedule to individual tasks, directing and routing to appropriate staff members and external parties in accordance with internal policies and timelines.
- Clearly define processes by presenting messages and scripted talking points as the service representative progresses through tasks to ensure complete and consistent communication.
- Standardize letter templates using Microsoft Word, and leverage mail-merge technology to automate field population and letter generation.
- Store a complete audit history of letter and email communications.

## Effectively Manage Account Holder Relationships

- Access each account holder's entire portfolio from a single location with person-centric technology, including related accounts and account holders.
- Dynamically and seamlessly change the direction of a service request by undoing a task when new information becomes available.
- Handle account holder conversations and changes in real-time with built-in responsive functionality, allowing service professionals to easily evaluate and reset prior tasks and follow detailed "undo" instructions for each task type.
- Work and assign service tasks and tickets in priority order using queues within the system.

## Integration

Temenos is a leader in providing **connected technology** to the financial industry. Leveraging integration with best-of-breed providers, Temenos connects key services with innovative software creating the optimal work environment.

## More Information

To learn more about the Service module and other cutting-edge software solutions for financial institutions, visit [www.temenos.com](http://www.temenos.com).

The screenshot displays the Temenos Service module interface. At the top, there's a navigation bar with 'Home', 'Charles Bell', and 'johndee@temenos.com'. Below this, a sidebar shows navigation options like 'Screens', 'Workflows', and 'Tickets'. The main area is divided into sections: 'Overview', 'Related Accounts', 'Related Tickets', and 'Related Persons'. The 'Related Tickets' section contains a table with columns for Ticket Number, Service Ticket Type, Status, and Status Date. Below this, the 'Related Persons' section shows details for Charles Bell and Zee Bell. At the bottom, the 'Account Information' section displays financial data such as Balance, Amount Last Paid, Current Fee, Current Payment, and STQ Amount.

Ticket Number	Service Ticket Type	Status	Status Date
BCR-00000027	Replacement Card	In Progress	18/02/2015 9:25:26 AM
ACH-00000041	Fee Dispute	In Progress	18/02/2015 9:43:43 PM
BCR-00000056	Replacement Card	In Progress	19/02/2015 4:03:00 PM
ACH-00000057	Fee Dispute	In Progress	19/02/2015 4:03:51 PM
ACAD-00000059	Change Address	In Progress	19/02/2015 4:07:00 PM
DEF-00000032	Loan Deferral	In Progress	21/02/2015 9:02:38 AM
ACAD-00000247	Change Address	Completed	21/02/2015 3:54:57 PM
FEI-00000248	Fee Dispute	In Progress	21/02/2015 3:55:01 PM

Full Name	idMC	Current Address	Home Phone	Work Phone
Charles Bell	Primary		620-205-6687	620-593-4700
Zee Bell	Collaborator1	4178 Timberline Drive Drexel, PA 19029	620-205-6687	484-213-4071

**Account Information**

Balance: \$23,232.96	Available Balance:
Amount Last Paid: \$566.05	AP Payment Amount:
Current Fee:	Current Late Charge: \$24.00
Current Payment: \$266.05	Delinquent Flag: <input type="checkbox"/>
STQ Amount: \$1,888.15	Principal Balance:
Payoff Date:	

Increase service quality with the Temenos Service module!