

SecurLOCK™ Equip - mConsole Overview

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Empowering
the Financial World



SecurLOCK™ Equip – mConsole Overview

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SecurLOCK™ Equip – mConsole Overview

Objectives

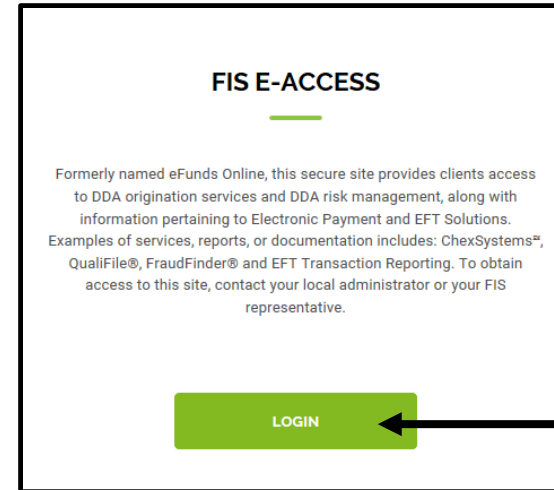
- **Describe the basic functions of the mConsole application**
- **Understand how to use the mConsole application to provide support for the SecurLOCK™ Equip users and analyze system usage**
- **Understand how to navigate between the different application screens**

SecurLOCK™ Equip – mConsole Overview

Access mConsole

Access the mConsole application by using FIS eAccess.

1. Enter this URL: www.fisglobal.com/login
2. Click Login under 'FIS E-ACCESS'



Click

3. After selecting the eAccess option, login to FIS eAccess by entering your User ID and password.

A. Enter

B. Click

A screenshot of the FIS eAccess login form. The form has a white background with a black border. At the top left, there is the FIS logo. To the right of the logo, there is a grey rectangular box with the text "FIS eAccess" in green. Below this, there is a section titled "Login" in bold black text. Under the "Login" section, there is a paragraph of text: "This secure site provides access to services and information applicable to our customers. To obtain access to this site, contact your local administrator or your FIS representative." Below this text, there are two input fields: "User ID:" and "Password:". Both fields are highlighted with a red rectangular border. Below the input fields, there are two buttons: "Login" and "Cancel". The "Login" button is highlighted with a red rectangular border. At the bottom of the form, there is a link that says "Did you forget your password?" in blue text.

SecurLOCK™ Equip – mConsole Overview

Access mConsole



C. Click

4. Click Open to access the SecurLOCK™ Equip mConsole app.

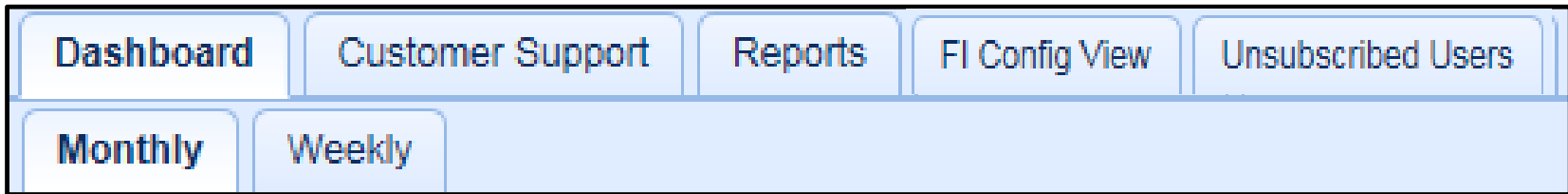


5. The SecurLOCK Equip mConsole app opens in a new tab in the browser.

* Note: the 'Help' link in the top-right is a built-in guide that provides users with additional information on everything in mConsole.

SecurLOCK™ Equip – mConsole Overview

Access mConsole



- A financial institution's users can get access to mConsole through a Single-Sign-On process via FIS eAccess. Specifically, the user accesses mConsole directly via a secure link within the eAccess portal.
- Given the user has access to the link via eAccess, the user is already authenticated and can go directly to mConsole without additional validation.
- Modules within mConsole are based on individual user privileges: Dashboard, Customer Support, Reports, FI Config View, Unsubscribed Users.
- FIS Client/Customer Support can also access this application.

SecurLOCK™ Equip – mConsole Overview

Access mConsole

You will see up to five mConsole tabs and their components:

- **Dashboard:** Default screen initially shown when a user logs in to the application; provides real-time key metric reports related to user registration, active users and transaction alerts and controls.
- **Customer Support:** Access user, card, and transaction information and activity in the Mobile App and make changes on behalf of the user; for example, you can reset cards that are locked during the card registration process.
- **Reports:** View and generate reports related to activities in the system.
- **FI Config View:** Access view-only information for your Financial Institution to view its setup parameters.
- **Unsubscribed Users:** Search to find users who have stopped managing all cards previously registered on the Mobile App.

SecurLOCK™ Equip – mConsole Overview

Access mConsole

Group Name roles:	FI Admin	FI User	FI User - limited
Recommended Access Privileges	FI Tech Support FI Management	Consumer Support	Limited Consumer Support
Dashboard			
Monthly	X		
Weekly	X		
Customer Support			
Customer Troubleshooting	X	X	X
Reset Registration State	X	X	X
Customer Details	X	X	X
On Behalf Of	X	X	
Activity Viewer	X	X	X
Reports			
View Generated Report	X		
View Scheduled Report	X		
Create Report	X		
FI Config View			
FI Config View	X		
Unsubscribed User			
Unsubscribe (View)	X	X	

SecurLOCK™ Equip – mConsole Overview

Access mConsole

- **A user can have access to one or more modules within mConsole based on their Role definition. Role definitions are predefined at the system level.**
- **There is no limit to the number of mConsole users that a financial institution can define.**
- **FI mConsole users will only have access to information that is specific to their financial institution.**

SecurLOCK™ Equip – mConsole Overview

Dashboard Tab

- General Information
- Portlets
- Export data to a spreadsheet
- Monthly view
- Weekly view

Dashboard Tab

General Information

View
options



Export

- The Dashboard provides key metrics about users, alerts and controls.
- All metrics are displayed even if a financial institution does not provide a particular service; however, the graphs for those metrics would not contain any data.
- Metrics can be viewed by the month or by the week.
 - Monthly view shows the key metrics for a rolling twelve-month period.
 - Weekly view displays the same information by week.
- Metrics data can be exported as an Excel spreadsheet.
- An FI's users can only view information specific to that FI.
- An agent bank's users can choose to view a specific FI or all FI's by choosing from the 'Select FI' drop-down.

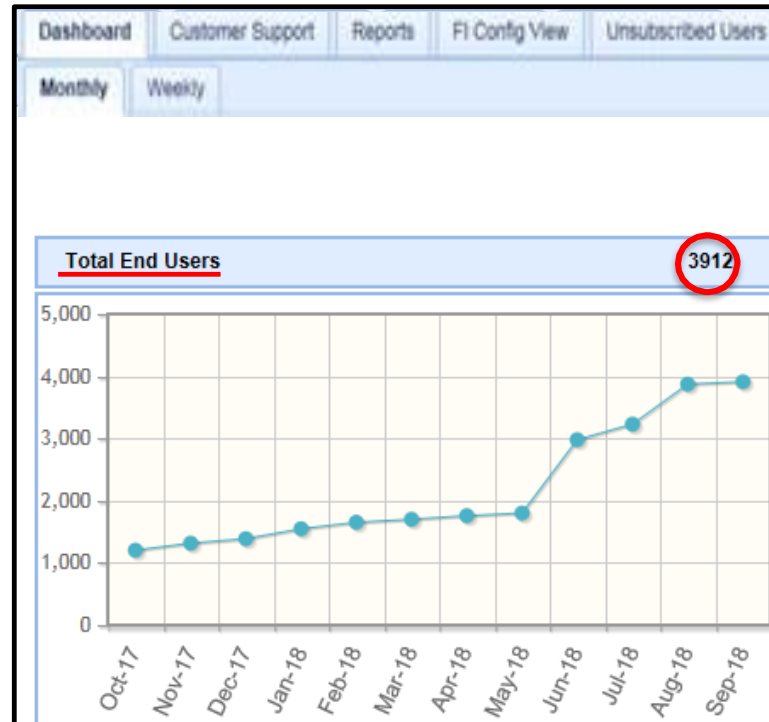
Dashboard Tab

Portlets

- Total End Users portlet
- New End Users portlet
- Active End Users portlet
- Transaction Alerts portlet
- Alerts by Categories portlet
- Transaction Controls portlet
- Controls by Categories portlet

Portlets

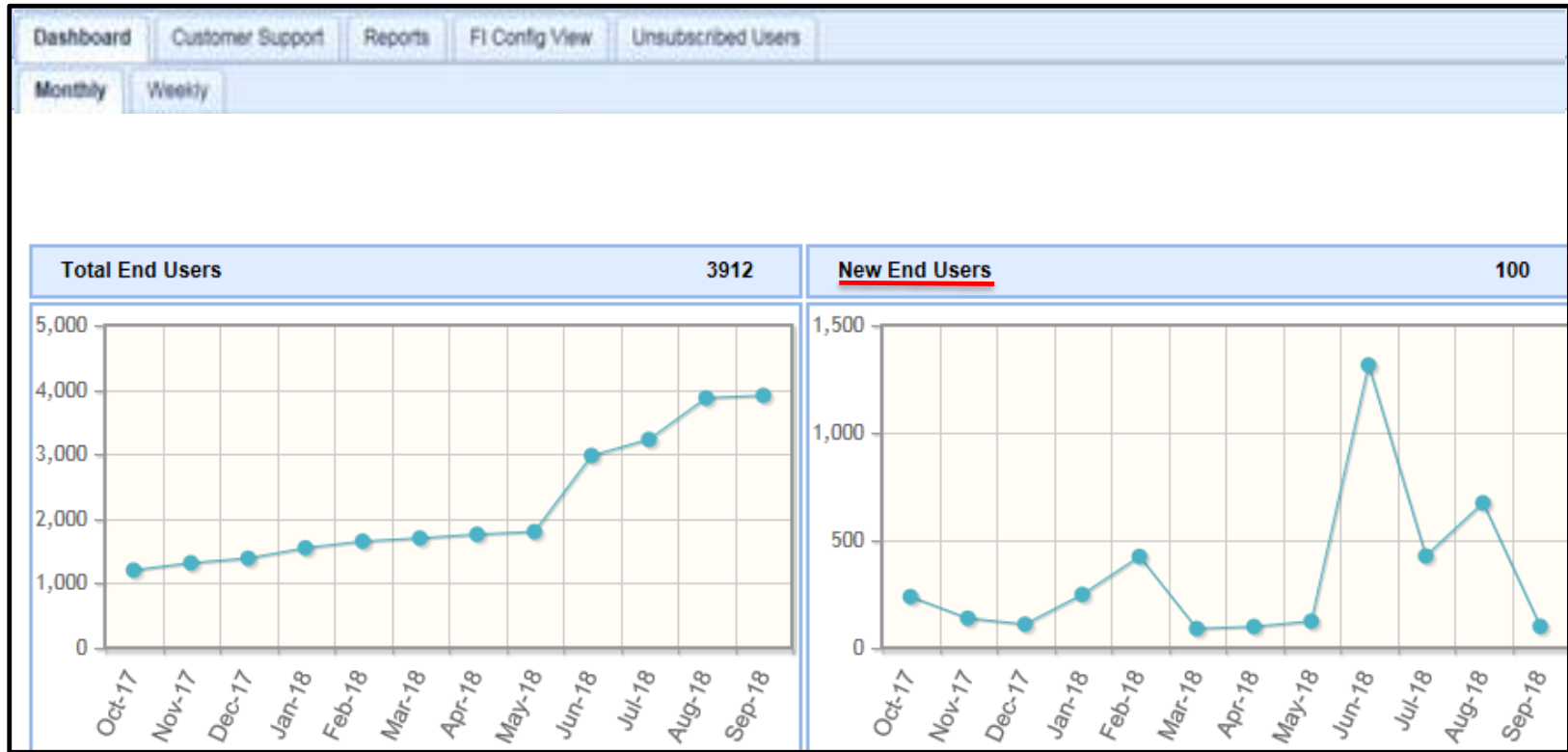
Total End Users Portlet



- Cumulative total number of users who have completed registration in the month or week to date.
- The number is displayed in the upper right corner.
- For each graph, you can view the numbers associated for each month by hovering the mouse over the line or bar for a specific month.

Portlets

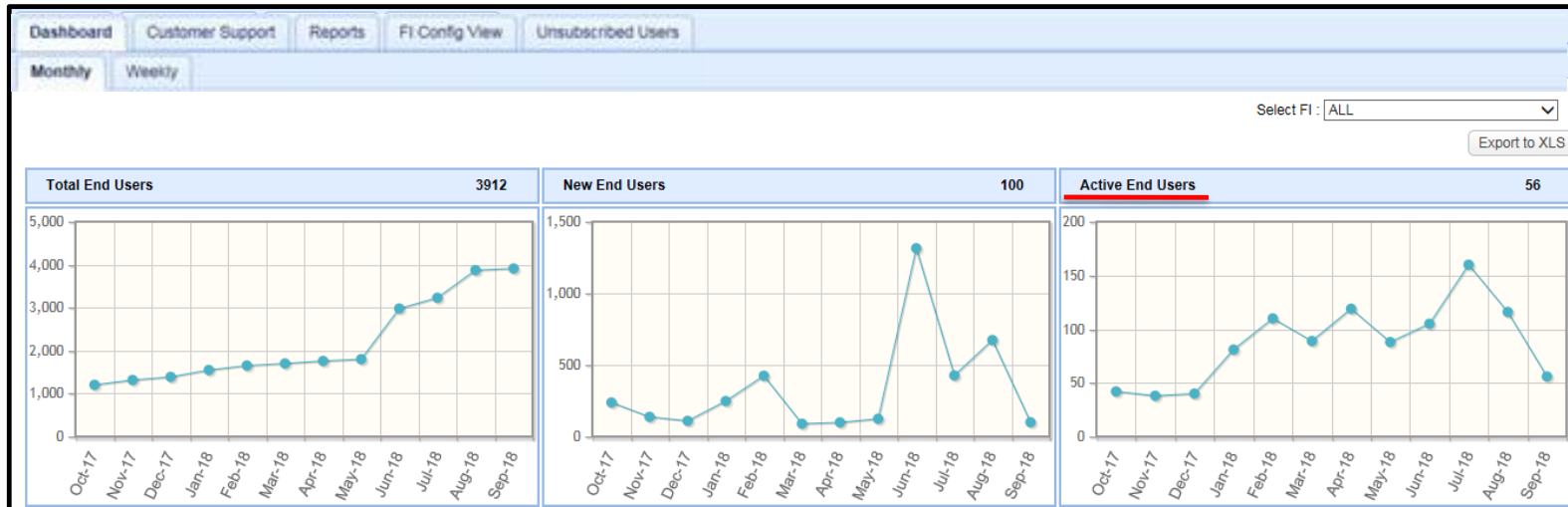
New End Users Portlet



- Total number of new registrations for a specific calendar month or week.
- The number is displayed in the upper right corner.

Portlets

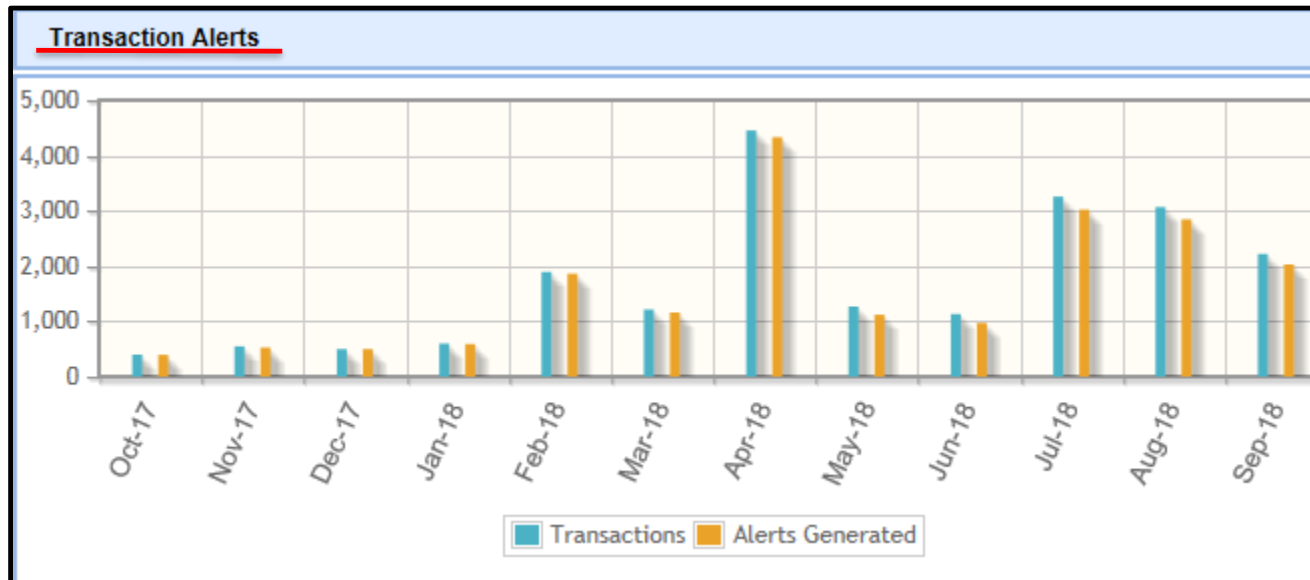
Active End Users Portlet



- The Active End Users portlet shows the number of active users by week or month.
- An active user is one who has completed registration and made a card transaction within a given calendar month or week.
- The number of new active users is displayed in the upper right corner.

Portlets

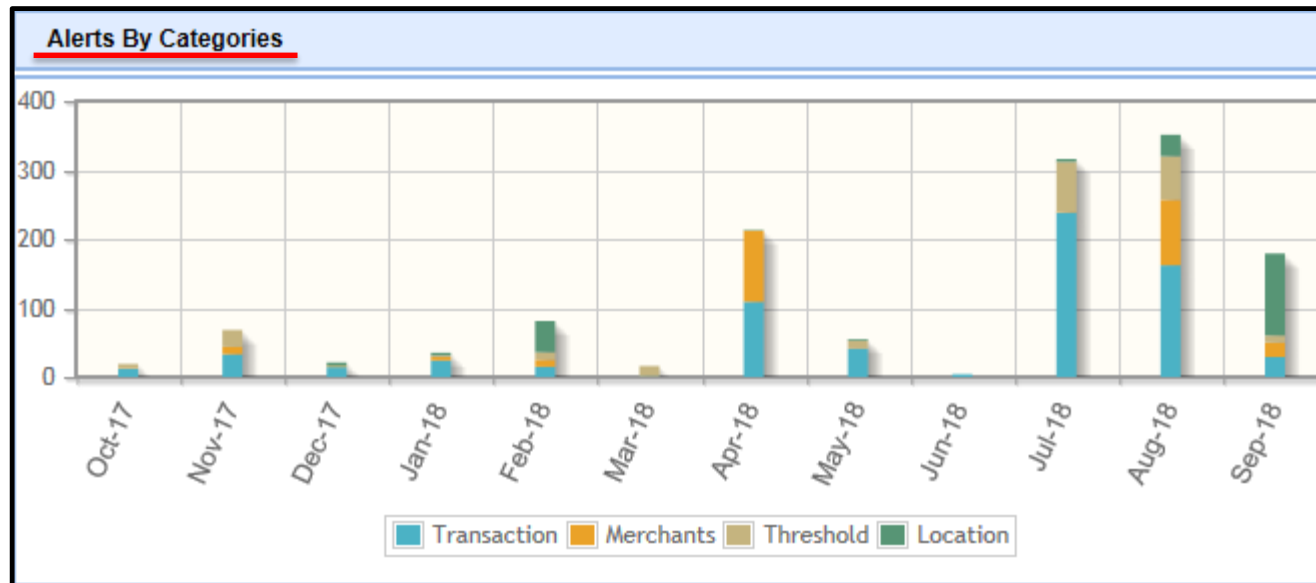
Transaction Alerts Portlet



- The Transaction Alerts portlet shows data regarding transaction alerts by month going through the system.
 - **Transactions** - The first bar shows the total number of transactions processed by the system in the given period.
 - **Alerts** - The second bar shows the total number of transactions for which an alert was generated.

Portlets

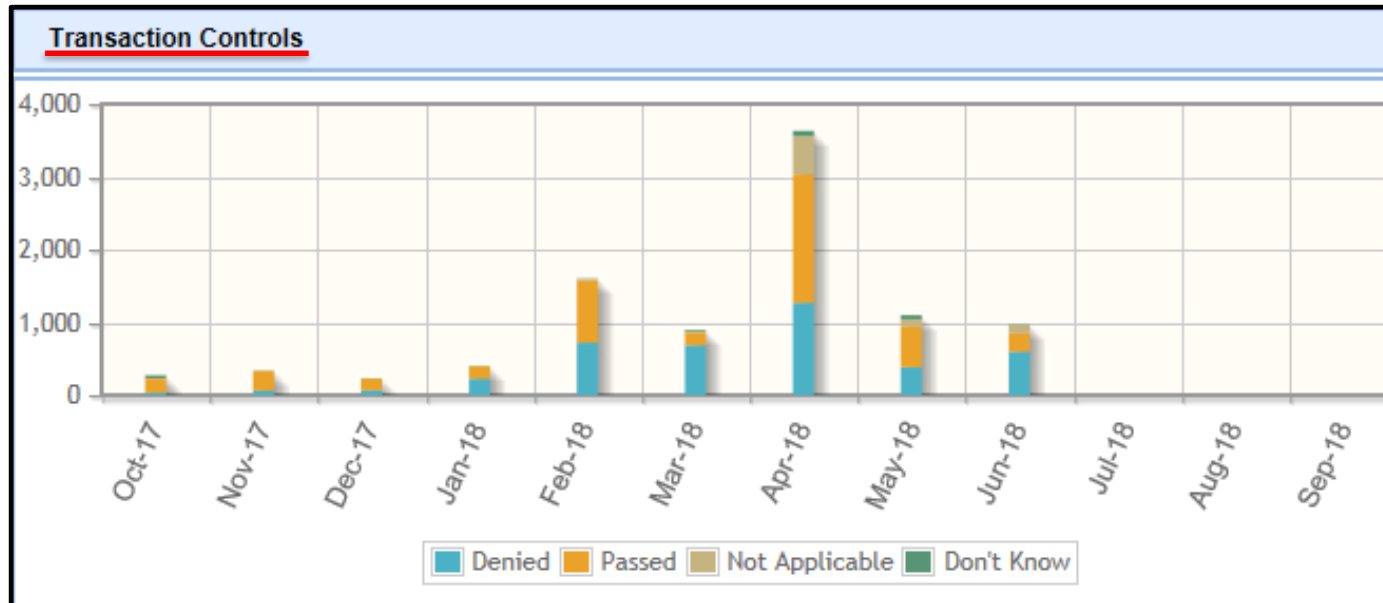
Alerts By Category Portlet



- Number of Transaction alerts generated when a user has selected one or more preferences within an Alert category.
- Alerts are divided into four categories that correspond to Alert preferences set by cardholders: Transaction (type), Merchants (type), Threshold, and Location.
- Put cursor over a color within the column to display the number of alerts by that category.

Portlets

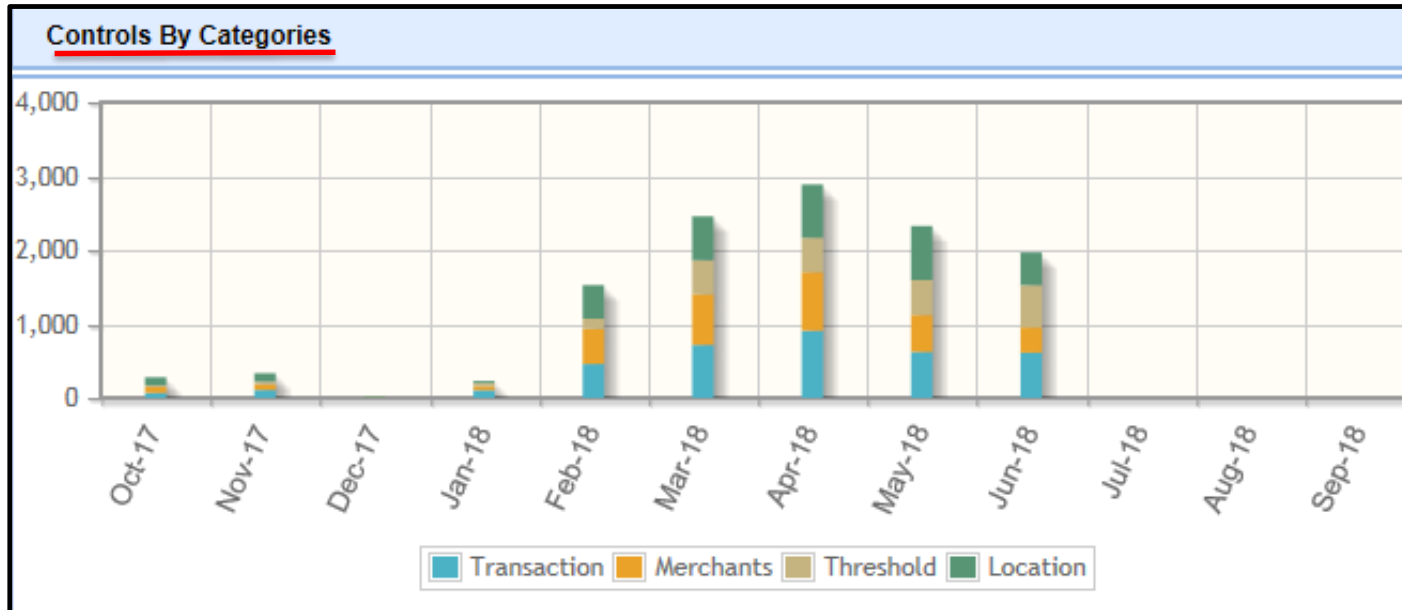
Transaction Controls Portlet



- Number of Transaction controls applied for transactions going through the system.
- The data is separated into four segments: Denied, Passed, Not Applicable, Don't Know.

Portlets

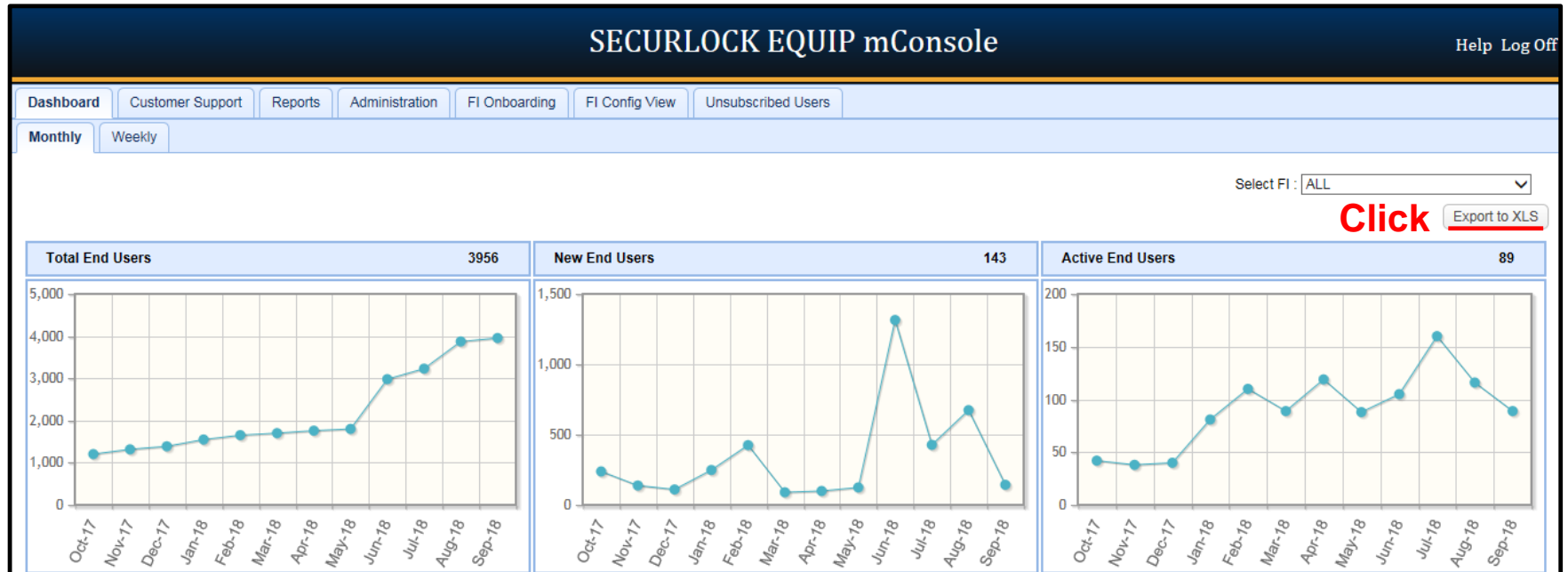
Controls By Categories Portlet



- Number of Transaction controls applied in a given period by category regardless of whether the transaction was approved or denied.
- Controls are divided into four categories, which correspond to policies set by the user within the application: Transaction (Type), Merchants (Type), Threshold, and Location.

Access mConsole

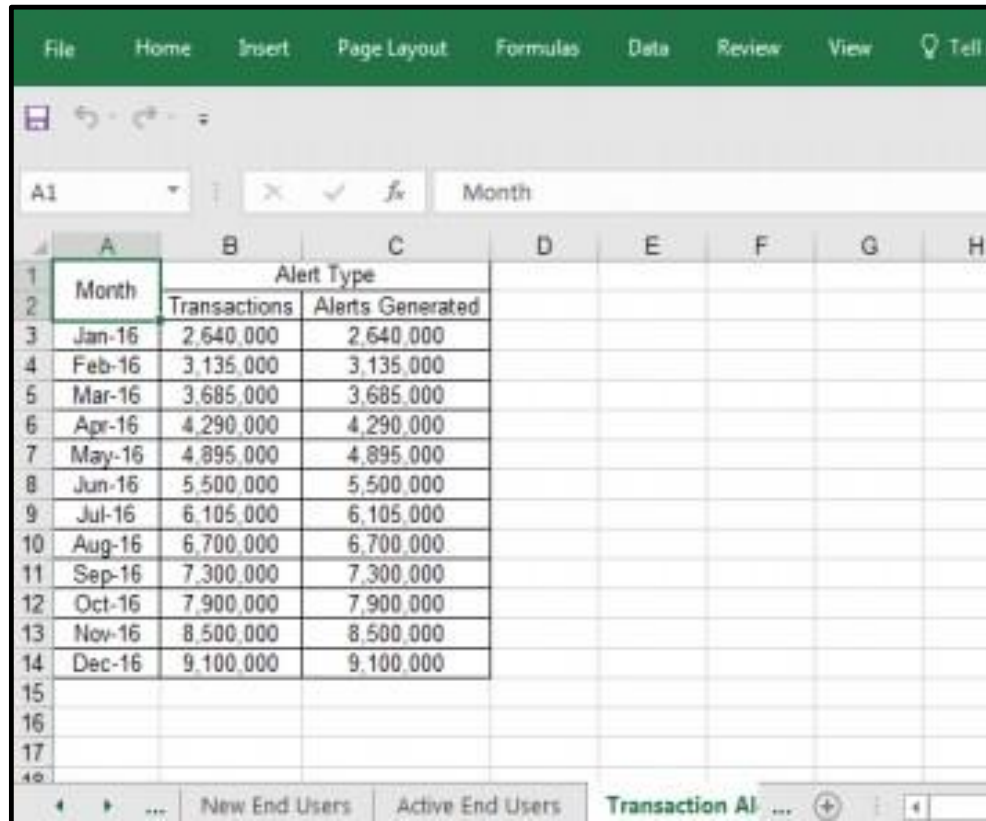
Export Data To a Spreadsheet



- Use the Export to XLS feature to create an Excel file that can be saved and downloaded to your computer.
- The Excel file contains seven worksheets containing the raw data for each of the graphs displayed on the Dashboard screen.
- Click 'Export to XLS' in the upper right corner of the Dashboard screen.

Access mConsole

Export Data To a Spreadsheet



The screenshot shows an Excel spreadsheet with the following data:

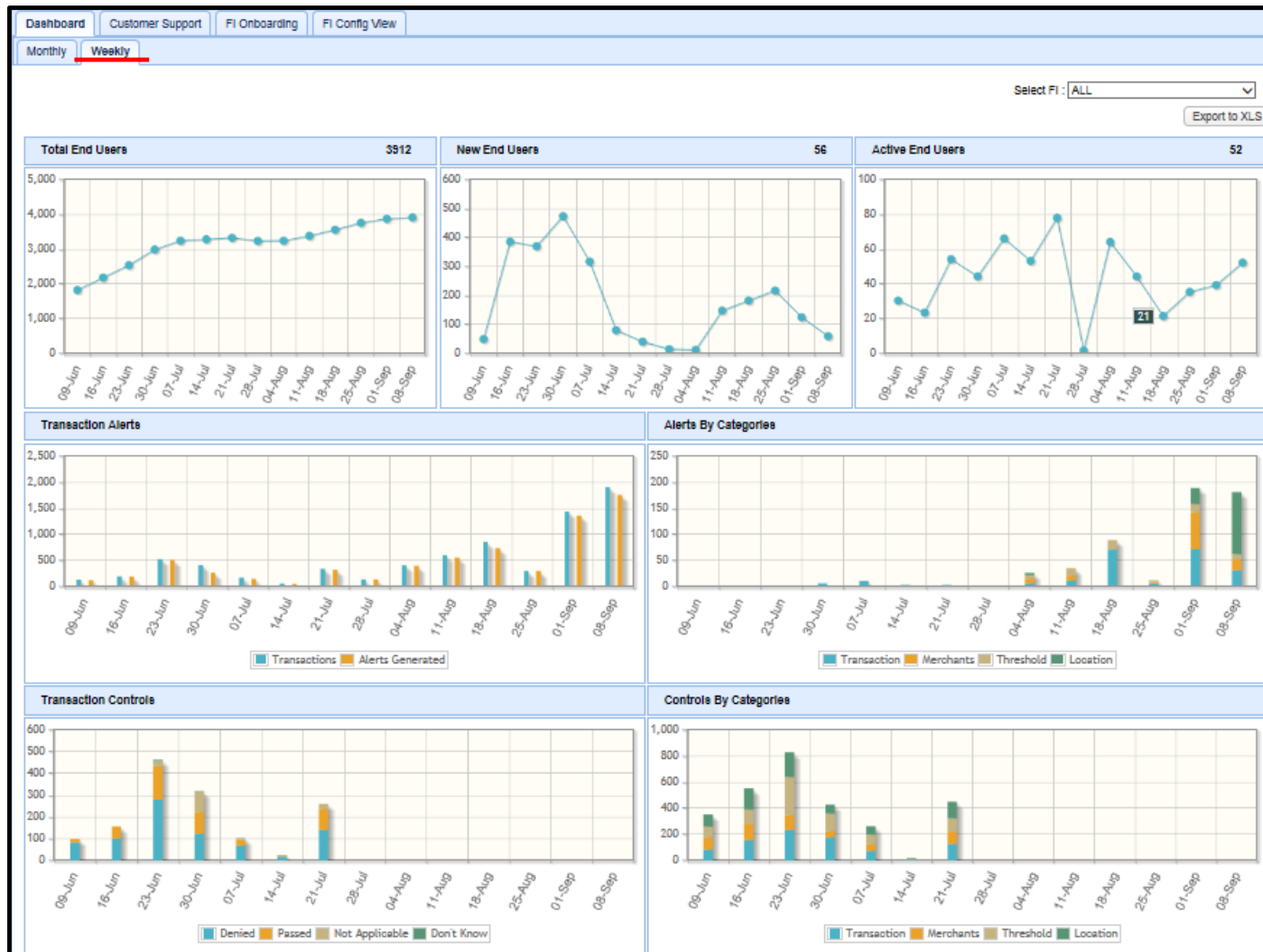
Month	Transactions	Alerts Generated
Jan-16	2,640,000	2,640,000
Feb-16	3,135,000	3,135,000
Mar-16	3,685,000	3,685,000
Apr-16	4,290,000	4,290,000
May-16	4,895,000	4,895,000
Jun-16	5,500,000	5,500,000
Jul-16	6,105,000	6,105,000
Aug-16	6,700,000	6,700,000
Sep-16	7,300,000	7,300,000
Oct-16	7,900,000	7,900,000
Nov-16	8,500,000	8,500,000
Dec-16	9,100,000	9,100,000

The spreadsheet interface includes a ribbon with tabs: File, Home, Insert, Page Layout, Formulas, Data, Review, View, and Tell n. The formula bar shows 'Month'. The status bar at the bottom indicates 'New End Users', 'Active End Users', and 'Transaction Al ...'.

- Find the downloaded XLS file on your computer and click to open it.

Access mConsole

Weekly View



- Portlet activity is reported on a weekly basis as well.

SecurLOCK™ Equip - mConsole Overview

Customer Support Tab

- General Information
- Customer Troubleshooting tab
- Reset Registration State tab
- Register New User
- Customer Details tab
- Activity Viewer tab
- On Behalf Of tab

Customer Support Tab

General Information





- **The Customer Support Tab is designed to enable Customer Support reps to effectively help end users with problems using the app. Specifically, it provides the following functionality:**
 - Search for specific users
 - View a user's details, associated cards, transactions and messages
 - Reset a card that has been locked during the registration process
 - View all actions the user took on the device
 - Change selected settings in the Mobile App on behalf of the user

Customer Support Tab

Customer Troubleshooting Tab - Customer Search

The screenshot shows a web interface with a top navigation bar containing tabs: Dashboard, Customer Support, Reports, FI Config View, and Unsubscribed Users. Below this is a sub-tab labeled 'Customer Troubleshooting'. The main section is titled 'Enter Customer Information' and contains several input fields: 'Card Number' (with placeholder 'Enter last four digits'), 'Account Number' (with placeholder 'Enter last four digits'), 'Customer Name' (with placeholder 'Enter partial/full name'), 'Customer ID' (with placeholder 'Enter full ID'), and 'Subscriber Reference ID' (with placeholder 'Enter Subscriber Ref ID'). To the right of these fields is a 'Select FI:' dropdown menu currently set to 'ALL'. At the bottom right of the form are two icons: a magnifying glass (search) and a red circle with a minus sign (clear).

- To find a registered user, enter information about the user in the Customer Information fields:
 - **Card Number** – Enter the last four digits of the card number (this works independently).
 - Account number linked to the card – not functional.
 - **Customer Name** - Enter the user's full or partial name (first and last) or login name (this works in conjunction with card number).
 - Customer ID – not functional
 - **Subscriber Reference ID** - Enter the Subscriber Reference ID found in the Customer Details section of mConsole (also can be found via Detailed Reports).
 - Select FI - Designed for Processors to allow them to select a specific onboarded FI
- Click the magnifying glass  to submit your search criteria and generate a list of all users matching your search criteria.
- To clear the values previously entered, tap on the Clear icon 

Customer Support Tab

Customer Troubleshooting Tab – Customer Details Display

The image shows two screenshots of the mConsole interface. The left screenshot shows the 'Customer Support' tab with a 'Customer Troubleshooting' sub-tab. A red box highlights the 'Customer Details' link in the 'List of Matching Customers' section, with a red arrow pointing to the right screenshot. The right screenshot shows the 'Customer Details' page, which is divided into three main sections: 'Customer Information from User', 'Customer Information from FI', and 'Primary Device Information'. The 'Customer Information from User' section includes fields for Subscriber ID, Financial Institution, Full Name, Login Name, Email Address, Phone Number, and Status. The 'Customer Information from FI' section includes fields for Customer ID, Customer Name, Email Address Registered with FI, Phone Number, and Phone Type. The 'Primary Device Information' section includes fields for Device Type, OS Version, Application Version, Notification Token, Last Login Name, Current Network, and Current Country. A red box highlights the 'Customer Details' link in the left screenshot, and a red arrow points from it to the 'Customer Details' page in the right screenshot.

Customer Information from User

Subscriber ID	2
Financial Institution	Certified First National
Full Name	Dave Golden
Login Name	demouser1
Email Address	dave@ondotsystems.com
Phone Number	
Status	Active

Customer Information from FI

Customer ID	XXXX XXXX XXXX 0001
Customer Name	Manikandan Periyasamy
Email Address Registered with FI	manikandan@ondotsystems.com
Phone Number	
Phone Type	

Primary Device Information

Device Type	iOS
OS Version	8.1.3
Application Version	3.0.11.ios.11
Notification Token	28bcde418cfad7b4c4859c237e4c...
Last Login Name	demouser1
Current Network	lo0
Current Country	United States

- mConsole users can click on the **Customer Details** link to view detailed user information. The default **Customer Details** page shows the following sections:
 - Customer Information from User: information collected during the registration process or by tracking the user's activities in the Mobile App
 - Customer Information from FI: received from the FI's system of record
 - Primary Device Information: contains data about the user's primary device
 - Accounts (not used), Cards, Transactions, and Account/Card Alerts
- The information displayed here may be useful to a **Customer Support** rep in helping to troubleshoot further with a user.

Customer Support Tab

Customer Troubleshooting Tab – Customer Details Display

- **‘Customer Information from User’** displays the user’s login name.
- The **‘Status’** field shows one of the following values:
 - **Active:** User has completed the Registration process and can log in to the Mobile App.
 - **Disabled:** User has been disabled from logging in to the Mobile App.
 - **Unsubscribed:** User has been unsubscribed from the Mobile App, either by the user’s own action in the Mobile App or by an mConsole user using the On Behalf Of functionality.
- **Notification Policy** indicates whether the user has enabled push notifications for the primary device.
- **Security Token** is the value of the most recent six-digit Registration or Reset Password security token sent to the user’s email address.
- **Number of Logins** shows the number of times the user has logged into the Mobile App.
- **Last Login Time** shows the time at which the user last logged in successfully to the Mobile App.
- **Resident Country** lists the home country of the user’s primary device.

Customer Information from User	
Subscriber ID	23499
Subscriber Reference ID	597285cdondot1898sub4588bd142
Financial Institution	024364-545581-101
Full Name	Prasad
Login Name	test0140
Email Address	prasad.kannemadugu@fisglobal.com
Phone Number	
Status	Active
Notification Policy	On
Security Token	
Security Token Expiration Date	
Number of Logins	49
Number of Login Failures	0
Last Login Time	Wed 08-29-2018 09:25:20 CDT
Last Non-Transaction Alert Time	
Resident Country	United States

Customer Support Tab

Customer Troubleshooting Tab – Customer Details Display



The screenshot shows a window titled 'Primary Device Information' with a table of user details. The table has two columns: a label column and a value column. The values include device type (iOS), OS version (11.2.6), application version (3.8.0.ios.337), notification token, last login name (test9033), current network (AirTel), current country (India), unique device number, app name (SECURLOCK EQUIP), and app token (FISSecurLOCKEquip).

Primary Device Information	
Device Type	iOS
OS Version	11.2.6
Application Version	3.8.0.ios.337
Notification Token	71fe2891a9892fba1db211f9c48d33
Last Login Name	test9033
Current Network	AirTel
Current Country	India
Unique Device Number	a10ce211-b0d1-37ee-bc40-6352ac
App Name	SECURLOCK EQUIP
App Token	FISSecurLOCKEquip

- The '**Primary Device Information**' shows the user's device type: iOS or Android.
- **OS Version** indicates the version of the operating system used by the user's primary device.
- **Application Version** shows the version of the Mobile App currently installed on the user's primary device.
- **Last Login Name** lists the login ID most recently used to log in from the primary device.
- **Current Country** provides the country from which the user is using the primary device.

Customer Support Tab

Customer Troubleshooting Tab – Customer Details Display

Primary Device Information	
Device Type	iOS
OS Version	11.3.1
Application Version	1.0.7
Notification Token	c1d6b78eddee2f966539ee9cc547.
Last Login Name	clg0213
Current Network	lo0
Current Country	United States

- Device is Primary

Primary Device Information	
Device Type	iOS
OS Version	11.3.1
Application Version	1.0.0
Notification Token	6b871ecde92015ceae55e28ede2...
Last Login Name	
Current Network	lo0
Current Country	United States

- Images on the **left** are examples from SecurLOCK Equip Custom App
- Images on the **right** are examples from API Integrated Card Controls

Primary Device Information	
Device Type	
OS Version	
Application Version	
Notification Token	
Last Login Name	
Current Network	
Current Country	

- Device is NOT Primary

Primary Device Information	
Device Type	
OS Version	-1
Application Version	
Notification Token	
Last Login Name	
Current Network	NA
Current Country	

Customer Support Tab

Customer Details Tab

- **Cards tab**
- **Transactions tab**
- **Account/Card Alerts tab**
- **Activity Viewer tab**

Customer Support Tab

Customer Details Tab - Cards Tab – Card Information

Customer Troubleshooting
Customer Details x

Customer Details

Customer Information from User

Subscriber ID	28505
Subscriber Reference ID	9789136bondote407sub48beaf7bft
Financial Institution	024364-545581-101
Full Name	venkat
Login Name	3802
Email Address	systems.com
Phone Number	

Accounts
Cards
Transactions
Account/Card Alerts

	Managed	Card Number	Card Type
Credit - 1 Item(s)			
1	✓	XXXX XXXX XXXX 0140	Credit

Double click

Card Details

View

Card Information

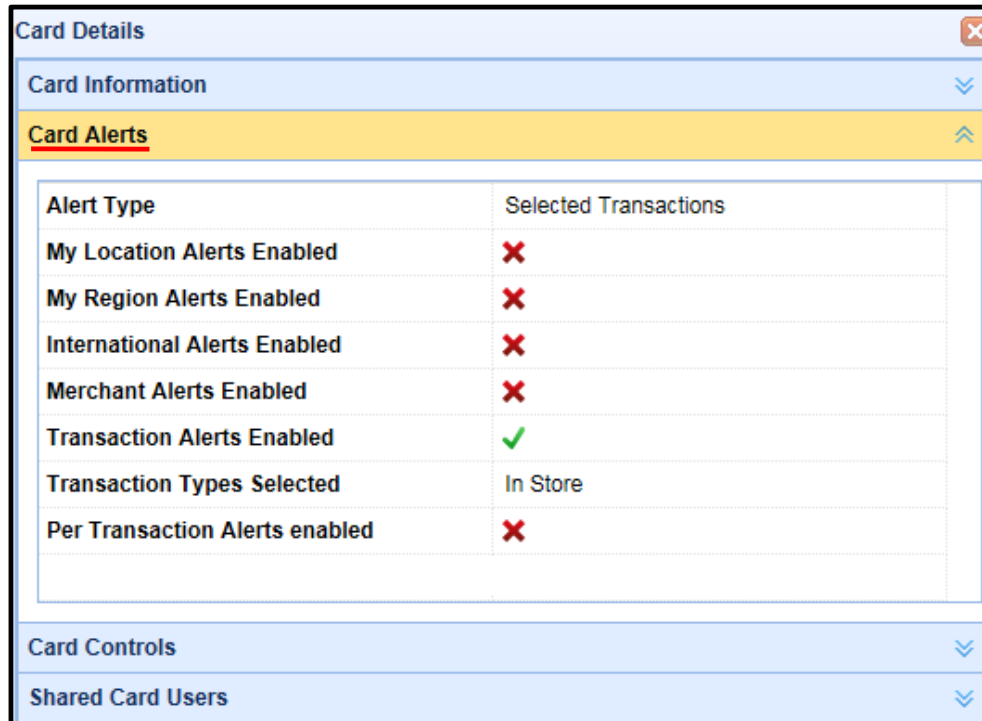
Card Number	XXXX XXXX XXXX 0140
Cardholder Name(s)	ELIO H CROWE
Card Status	Active
Cardholder Primary	✓
Active	✓
Card Enabled	✓
Card Issue Date	
Card Number Unique	✓
Is Primary	
Managed	✓
BIN Number	545581101
Card Type	Credit
Spent This Month	\$0.00
Resident Country	United States
Create Time	Mon 08-06-2018 10:27:41 CDT
Created By	App user
Last Update Time	Wed 09-05-2018 08:05:36 CDT

Card Alerts
Card Controls
Shared Card Users

- The Cards tab on the Customer Details screen displays information about the user's cards, which are organized in groups according to Card Type.
- Double-clicking on a card will bring up the Card Details pop-up, which shows detailed information about the card.
- Time shown in mConsole is in Central Time (CT).

Customer Support Tab

Customer Details Tab - Cards Tab – Card Alerts



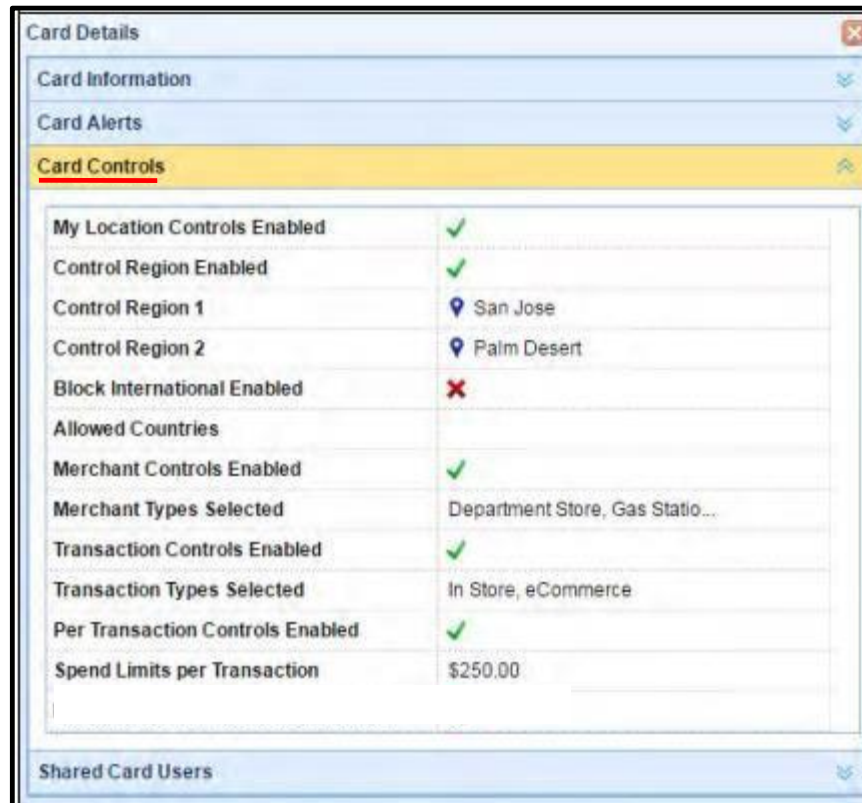
The screenshot shows a 'Card Details' window with a close button in the top right corner. It features four expandable/collapsible panes: 'Card Information', 'Card Alerts' (which is currently expanded and highlighted in yellow), 'Card Controls', and 'Shared Card Users'. Each pane has a corresponding up/down arrow icon. The 'Card Alerts' pane contains a table with two columns: 'Alert Type' and 'Selected Transactions'.

Alert Type	Selected Transactions
My Location Alerts Enabled	✗
My Region Alerts Enabled	✗
International Alerts Enabled	✗
Merchant Alerts Enabled	✗
Transaction Alerts Enabled	✓
Transaction Types Selected	In Store
Per Transaction Alerts enabled	✗

- The Card Details window is organized into four expandable/collapsible accordion panes: Card Information, Card Alerts, Card Controls and Shared Card Users.
- Tapping on the up/down arrow next to each pane will expand it while collapsing the other three panes.
- The Card Alerts pane shown here displays which Alert Preferences the user has set for the card.

Customer Support Tab

Customer Details Tab - Cards Tab – Card Controls



The screenshot shows a 'Card Details' window with a sidebar on the left containing three tabs: 'Card Information', 'Card Alerts', and 'Card Controls'. The 'Card Controls' tab is selected and highlighted in yellow. The main area of the window displays a list of control settings for a card, each with a status indicator (green checkmark for enabled, red X for disabled) and a value or location.

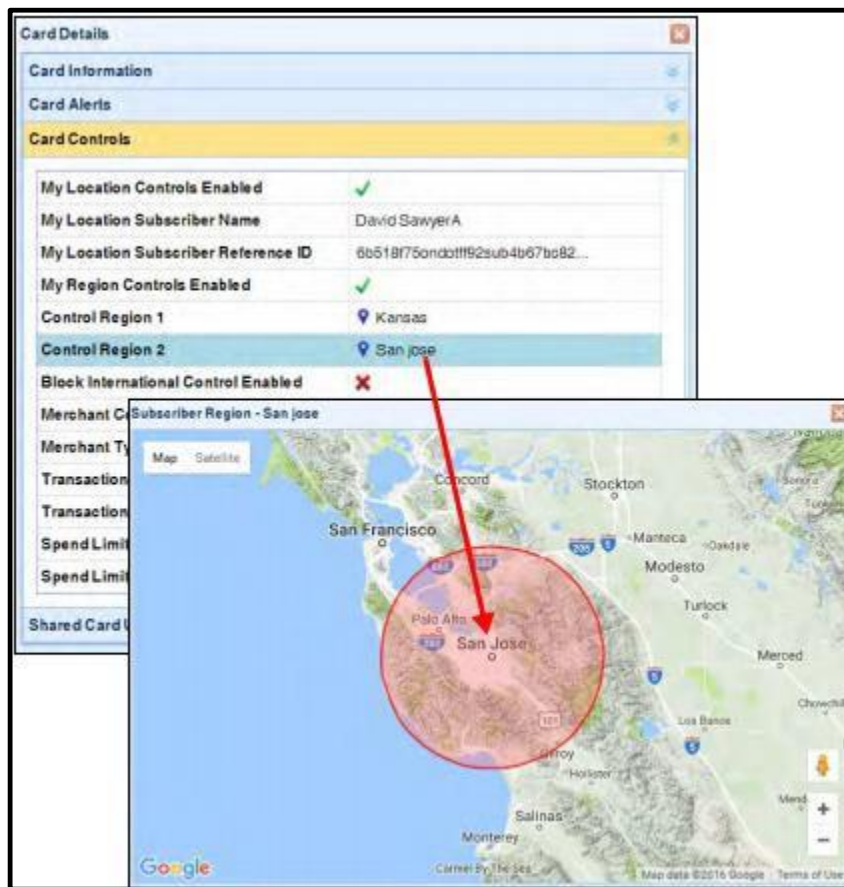
Control Setting	Status	Value/Location
My Location Controls Enabled	✓	
Control Region Enabled	✓	
Control Region 1		San Jose
Control Region 2		Palm Desert
Block International Enabled	✗	
Allowed Countries		
Merchant Controls Enabled	✓	
Merchant Types Selected		Department Store, Gas Statio...
Transaction Controls Enabled	✓	
Transaction Types Selected		In Store, eCommerce
Per Transaction Controls Enabled	✓	
Spend Limits per Transaction		\$250.00

At the bottom of the window, there is a section labeled 'Shared Card Users'.

- The Card Controls pane shows which Control Preferences the user has set for the card.

Customer Support Tab

Customer Details Tab - Cards Tab – Card Controls



- The Card Controls pane shows any regions defined by the user, if My Regions is enabled.
- Clicking on a region shows an approximate map of the region defined by the user.

Customer Support Tab

Customer Details Tab - Cards Tab – Shared Card Users



Full Name	Access Level	My Location
Peter Victor	Full Access	Disabled
Andrew James	Full Access	Disabled
Michael Benjamin	Full Access	Disabled
Heidi Lynn	Restricted Access	Disabled
Vicki Mater	Full Access	Disabled

- Tap on the Shared Card Users pane to view all users who have registered or added the same card.
- This pane shows each shared card user's full name and access level (Full or Restricted).
- Indicates whether the user has set up the My Location control.

Customer Support Tab

Customer Details Tab – Transactions Tab

Accounts

Cards

Transactions

Account/Card Alerts

Enter

Transaction From Date:

To Date:

	Transaction Status	Merchant Name	Total Amount	Transaction Date	Posted Date	Card Number	Alert Triggered
≡	Denied - 4 Item(s)						
1	Denied	FIFTH FINANCIAL	\$-7,157.97	02-13-2015		XXXX XXXX XXXX 0001	Status, On/Off
2	Denied	FIFTH FINANCIAL	\$-178.06	02-03-2015		XXXX XXXX XXXX 0001	Status
3	Denied	FIFTH FINANCIAL	\$-7,847.03	02-03-2015		XXXX XXXX XXXX 0001	Status
4	Denied	FIFTH FINANCIAL	\$-7,595.22	02-03-2015		XXXX XXXX XXXX 0001	Status
≡	Posted - 4 Item(s)						
5	Posted	FIFTH FINANCIAL	\$-7,852.78	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
6	Posted	FIFTH FINANCIAL	\$-2,941.59	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
7	Posted	FIFTH FINANCIAL	\$-2,138.51	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert
8	Posted	FIFTH FINANCIAL	\$-9,061.13	02-03-2015	02-03-2015	XXXX XXXX XXXX 0001	Always alert

10

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⏩

Page 1 of 1

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🔄

Displaying 1

- The Transactions pane on the Customer Details screen displays information about the user's card transactions, which are organized in groups based on Transaction Status: Posted, Pending, Denied, Full/Partial Reversal.
- Double-clicking anywhere in the transaction row will cause the Transaction Details window to display. As seen on the next slide, this shows detailed information about the transaction.
- Search for transactions by date using the search boxes at the top of the Transactions pane.

Customer Support Tab

Customer Details Tab – Transactions Tab – Transaction Info

The screenshot shows a window titled "Transaction Details" with a close button in the top right corner. The window is divided into five expandable/collapsible panes. The "Transaction Information" pane is currently expanded and highlighted with a yellow background. It contains a table with transaction details. Below it are four collapsed panes: "Merchant Details", "Alerts and Controls", "Subscriber Details", and "Diagnostic Information". Each pane has a small up/down arrow icon to its right. Red lines and the word "Click" are used to indicate where to click to expand or collapse these panes.

Transaction Information	
Final Decision	000
Description Header	Posted ATM Transfer Transact...
Description	
Transaction Amount	\$-100.00
Surcharge	\$-2.00
Total Amount	\$-102.00
Transaction Status	Posted
Transaction Type	ATM
Transaction Sub Type	Transfer
Transaction Date	03-01-2015
Transaction Time	23:48:17 GMT-08:00
Posted Date	03-01-2015
Posted Time	23:48:17 GMT-08:00
Reversal Amount	N/A
Notification Status	SENT-FAIL
Notification Read	✓
Transaction Tag	
Transaction Memo	

Merchant Details

Alerts and Controls

Subscriber Details

Diagnostic Information

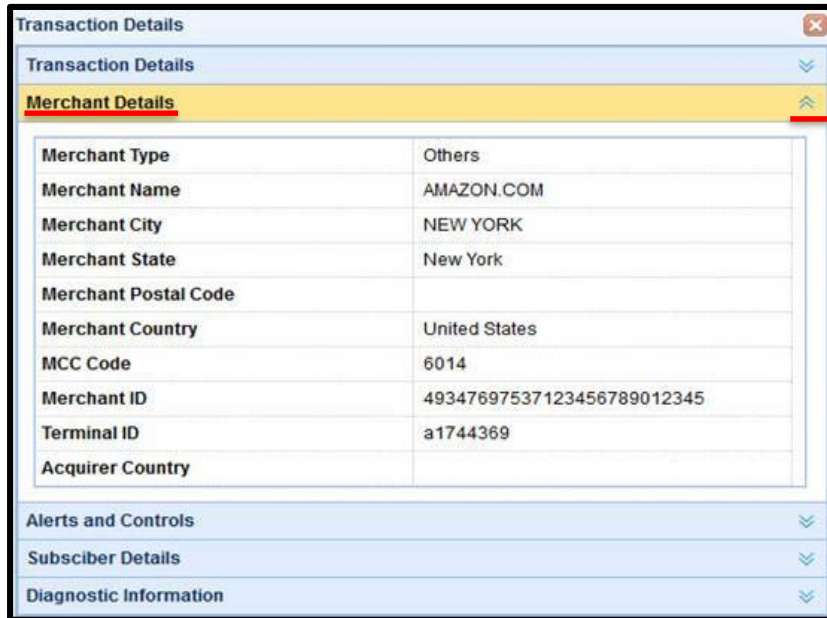
Click

Click

- The Transaction Details window is organized into five expandable/collapsible accordion panes: Transaction Information, Merchant Details, Alerts and Controls, Subscriber Details, and Diagnostic Information.
- Tapping on the up/down arrow next to each pane will expand it while collapsing the others.
- The Transaction Information pane includes the Transaction Status, Transaction Type/Sub-Type, Date and Time and shows if a Notification was sent and/or read by the user.

Customer Support Tab

Customer Details Tab – Transactions Tab – Merchant Details



The screenshot shows a window titled "Transaction Details" with a close button in the top right corner. The window contains several expandable sections. The "Merchant Details" section is currently expanded and highlighted with a yellow background. It contains a table with the following data:

Merchant Type	Others
Merchant Name	AMAZON.COM
Merchant City	NEW YORK
Merchant State	New York
Merchant Postal Code	
Merchant Country	United States
MCC Code	6014
Merchant ID	49347697537123456789012345
Terminal ID	a1744369
Acquirer Country	

Below the Merchant Details section are three more expandable sections: "Alerts and Controls", "Subscriber Details", and "Diagnostic Information".

Click

- Clicking on the Merchant Details arrow will display this pane and collapse the other panes.
- The Merchant Type field shows the merchant type categorization for the merchant, based on the MCC code sent in the transaction message.

Customer Support Tab

Customer Details Tab – Transactions Tab – Alerts and Controls

- **Controls Applied to Transaction** shows all the control policies set by the user to evaluate the transaction.
- **Control Recommendation** shows the authorization recommendation for the transaction.
- **Recommendation Reason** shows all the control policies applied to the transaction.
- **Reason for Transaction Exception** shows One-time Override if a transaction has been approved as a result of a One-time Override.
- **Transaction Alert Generated** appears if an alert was generated for the transaction. This field indicates which alert policies, set by the user, triggered the alert.

Transaction Details

Transaction Information

Merchant Details

Alerts and Controls

Controls Applied to Transaction	Status, Card On/Off, Merchant Types, International	
Control Recommendation	Rejected	
Recommendation Reason	Status	Not_Invoked
	Card On/Off	Rejected
	My Location	Not_Invoked
	Transaction Types	Not_Applicable
	Merchant Types	Not_Invoked
	My Regions	Not_Invoked
	Spend Limits - Per Transaction	Not_Applicable
	International	Not_Invoked
	ofw card state	Not_Applicable
	Spend Limits - Per Month	Not_Invoked
Warning Alert	Not_Invoked	
Transaction Alert Generated	Status, Card On/Off	
User Reported Transaction is Fraudulent	No	
Valid	true	

Subscriber Details

Diagnostic Information

Customer Support Tab

Customer Details Tab – Transactions Tab – Subscriber Details

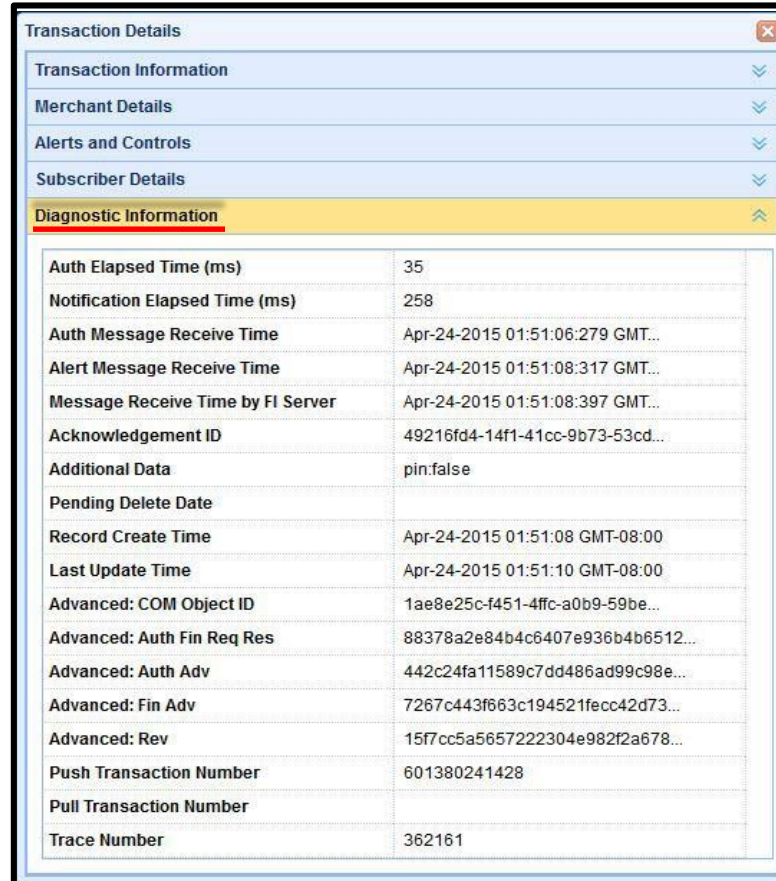
The screenshot shows a window titled "Transaction Details" for user "Charles A Mouse". The window has a sidebar with several tabs: "Transaction Information", "Merchant Details", "Alerts and Controls", "Subscriber Details" (which is highlighted in yellow), and "Diagnostic Information". The "Subscriber Details" tab contains a table with the following information:

Subscriber ID	13909
Card Number	XXXX XXXX XXXX 2779
Customer Name	
Account Number	
Secondary Account Number	
Subscriber Country	
Subscriber Latitude	29.98078
Subscriber Longitude	-90.16454
Subscriber Location Accuracy	13000.0

- This pane contains various information about the user associated with the transaction, including the card number, name, and location.
- If the user has set either My Location control or My Location alert preference, the user's location information will be shown in the Subscriber Latitude, Subscriber Longitude, and Subscriber Location Accuracy fields.

Customer Support Tab

Customer Details Tab – Transactions Tab – Diagnostic Information



The screenshot shows a 'Transaction Details' window with a sidebar on the left containing the following tabs: Transaction Information, Merchant Details, Alerts and Controls, Subscriber Details, and Diagnostic Information. The 'Diagnostic Information' tab is selected and highlighted in yellow. The main area displays a table of diagnostic data.

Auth Elapsed Time (ms)	35
Notification Elapsed Time (ms)	258
Auth Message Receive Time	Apr-24-2015 01:51:06:279 GMT...
Alert Message Receive Time	Apr-24-2015 01:51:08:317 GMT...
Message Receive Time by FI Server	Apr-24-2015 01:51:08:397 GMT...
Acknowledgement ID	49216fd4-14f1-41cc-9b73-53cd...
Additional Data	pin:false
Pending Delete Date	
Record Create Time	Apr-24-2015 01:51:08 GMT-08:00
Last Update Time	Apr-24-2015 01:51:10 GMT-08:00
Advanced: COM Object ID	1ae8e25c-f451-4ffc-a0b9-59be...
Advanced: Auth Fin Req Res	88378a2e84b4c6407e936b4b6512...
Advanced: Auth Adv	442c24fa11589c7dd486ad99c98e...
Advanced: Fin Adv	7267c443f663c194521fecc42d73...
Advanced: Rev	15f7cc5a5657222304e982f2a678...
Push Transaction Number	601380241428
Pull Transaction Number	
Trace Number	362161

- Click 'Diagnostic Information' to access the diagnostic data used to troubleshoot the transaction.
- The information shown in this pane is used for advanced troubleshooting of issues.

Customer Support Tab

Customer Details Tab – Account/Card Alerts Tab

Accounts Cards Transactions <u>Account/Card Alerts</u>			
	Active	Alert Type	Account Number Card Number
1	✓	<u>Card alert or auth policy change alert</u> Double click	XXXX XXXX XXXX 0140
2	✓	Card information alert	XXXX XXXX XXXX 1538
3	✓	Card alert or auth policy change alert	XXXX XXXX XXXX 1538

View

Alert Details	
Alert Type	Card alert or auth policy change al...
Account Number	
Card Number	XXXX XXXX XXXX 0140
Alert Description	Card ending in 0140 has been succes...
Pending Delete Time	Sat 09-15-2018 05:06:51 CDT
Record Create Time	Mon 08-06-2018 10:28:22 CDT
Last Update Time	Fri 09-07-2018 05:06:51 CDT

- From the Customer Support tab, click the Customer Details tab.
- The Account/Card Alerts sub-tab shows all card status or account status alerts the user has received.
- Click anywhere in the Alert row to display the Alert Details window, which shows detailed information about the alert (e.g., a status change in the card from 'Active' to 'Inactive').
- Pending Delete Time indicates when the alert will be rolled off of the system, after a period of 8 days.

Customer Support Tab

Activity Viewer Tab

Dashboard Customer Support Reports FI Config View Unsubscribed Users

Customer Troubleshooting Reset Registration State

Enter Customer Information

Card Number: Enter last four digits. Account Number: Enter last four digits.

List of Matching Customers

	Operations	Customer Name	Email Address
1	Customer Details Activity Viewer On Behalf Of	Alan Hammelman	

10 Page 1 of 1

Dashboard Customer Support Reports FI Config View Unsubscribed Users

Customer Troubleshooting Reset Registration State Customer Details x Activity Viewer x

Activity Details

Date From: To:

	User Flow	Sub Flow Detail	Status Flag	Reason Code	Additional Information	Create Time
1	Settings	manage account_card success	success		Cards Data Obtained	09-09-2014 15:39:57 GMT+05:30
2	Settings	manage account_card success	success		Accounts Data Obtained	09-09-2014 15:39:57 GMT+05:30
3	Settings	manage account_card request				09-09-2014 15:39:57 GMT+05:30

- Users can reach the Activity Viewer screen by clicking on the Activity Viewer link next to a customer on the Customer Troubleshooting screen.
- There is no exporting capability for Activity Viewer.

Customer Support Tab

Activity Viewer Tab

User Flow	Sub Flow Detail	Status Flag	Additional Information	Reason Code	Create Time
1	Card Settings	Card On/Off	Success	Username: mmartin is turning OFF Debit Card number: XXXX XXXX	10-03-2016 15:42:39 PDT
2	Authentication	Logging In	Success	Touch Login for Subscriber ID : 23499	10-03-2016 15:42:33 PDT
3	Authentication	Logging In	Success	Username: mmartin, Subscriber ID: 12	09-20-2016 14:51:13 PDT
4	Location Settings	Changing location control	Success	Username: mmartin is disabling My Region for Debit Card number X:	09-14-2016 16:03:56 PDT
5	Location Settings	Changing location control	Success	Username: mmartin is enabling My Region for Debit Card number X:	09-14-2016 16:03:49 PDT
6	Location Settings	Changing location control	Success	Username: mmartin is disabling My Region for Debit Card number X:	09-14-2016 16:03:38 PDT
7	Location Settings	Changing location control	Success	Username: mmartin is enabling My Region for Debit Card number X:	09-14-2016 15:59:03 PDT
8	Authentication	Logging In	Success	Username: mmartin, Subscriber ID: 12	09-14-2016 15:58:45 PDT
9	Authentication	Logging In	Failure	Username: mmartin, Number of failures : 1	09-14-2016 15:58:24 PDT
10	On behalf of	Enable all alerts	Success	All alerts being enabled by administrator: Gova	09-08-2016 16:19:31 PDT

- The Activity Viewer sub-tab displays actions the user has taken on the Mobile App and actions taken by the system due to the user's activities.
- The Activity Viewer also shows On Behalf Of action taken by mConsole users on the end user's behalf.
- This page provides information that is meant to be used by Customer Support Representatives as the first level troubleshooting tool.
- Activity is hard deleted on a rolling 90-day period.

Customer Support Tab

Activity Viewer Tab

Activity Viewer Details	
Virtual Host ID	1
Component ID	1
Component Type	fiserver
User Flow	Authentication
Sub Flow Detail	Logging In
Operator ID	162
Operator Type	Subscriber
Resource ID	162
Resource Type	Subscriber
Status Flag	Success
Reason Code	
Additional Information	Username: augangam, Subscriber ID: 162
Create Time	Wed Oct 19 14:49:01 PDT 2016

- Select a specific event in the Activity Viewer to open the Activity Viewer Details window and view additional information about the event.
- Click anywhere in the event row to display the Activity Viewer Details window.

Customer Support Tab

On Behalf Of Tab

The screenshot displays the 'Customer Support' interface. At the top, there are tabs: Dashboard, Customer Support, Reports, FI Config View, and Unsubscribed Users. Below these, there's a 'Customer Troubleshooting' section with a 'Reset Registration State' button. The 'Enter Customer Information' section contains fields for Card Number, Account Number, Customer Name, and Customer ID. Below this is a 'List of Matching Customers' table with columns: Operations, Customer Name, Email Address, and Login Name. A red arrow points from the 'On Behalf Of' link in the first row of the table to the 'On Behalf Of' sub-tab in the 'Customer Support' section. The 'On Behalf Of' sub-tab is active, showing a search bar and several sections: Login Account Information (with fields for Login Name and buttons for Disable Account, Enable Account, and Unsubscribe), Customer Information (with a field for Contact Email Address and buttons for Update and Cancel), Card Operations (with a dropdown for Select Card and buttons for Card On, Card Off, All Alerts, and No Controls), and Diagnostics (with a button for Test Push Notification).

Operations	Customer Name	Email Address	Login Name
1 Customer Details Activity Viewer On Behalf Of	Melanie		
2 Customer Details Activity Viewer On Behalf Of	Melanie		
3 Customer Details Activity Viewer On Behalf Of	Paul Go		
4 Customer Details Activity Viewer On Behalf Of	Melanie		
5 Customer Details Activity Viewer On Behalf Of	Varun A		

- Click on the On Behalf Of link on the Customer Search screen or navigate to the Customer Support tab and then the On Behalf Of sub-tab.
- On Behalf Of functionality allows an mConsole user to take action on behalf of the cardholder.
- A user will receive a notification when an mConsole user takes action on their behalf.

Customer Support Tab

On Behalf Of Tab

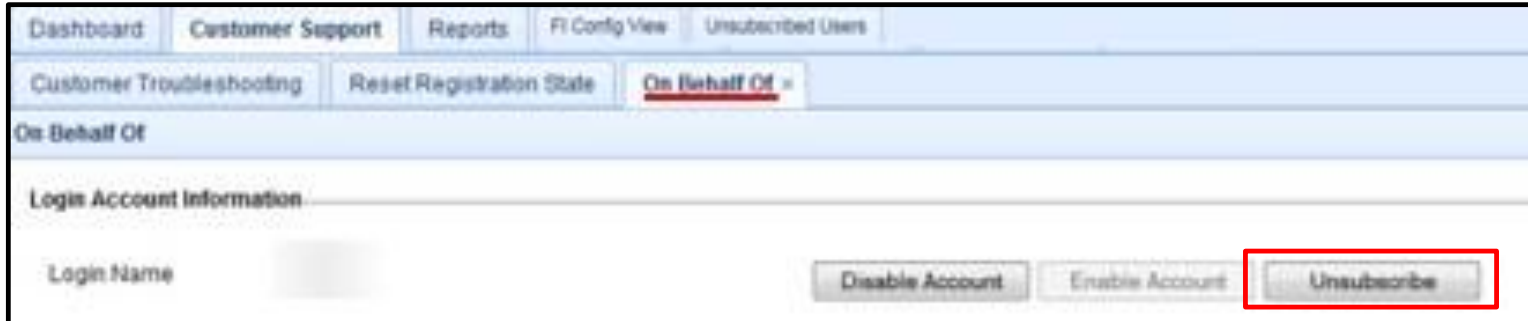
The screenshot shows a web application interface with a top navigation bar containing links: Dashboard, Customer Support, Reports, FI Config View, and Unsubscribed Users. Below this is a sub-navigation bar with links: Customer Troubleshooting, Reset Registration State, and On Behalf Of (which is highlighted with a red underline and a close icon). The main content area is titled 'On Behalf Of' and contains several sections:

- Login Account Information:** Includes a 'Login Name' input field and three buttons: 'Disable Account', 'Enable Account', and 'Unsubscribe'.
- Customer Information:** Includes a 'Contact Email Address' input field and two buttons: 'Update' and 'Cancel'.
- Card Operations:** Includes a 'Select Card' dropdown menu (showing 'Select a card') and four buttons: 'Card On', 'Card Off', 'All Alerts', and 'No Controls'.
- Diagnostics:** Includes a 'Test Push Notification' button.

- **Use the On Behalf Of feature to take these actions on behalf of a user:**
 - Enable and disable a user's Mobile App login credentials
 - Unsubscribe a user from the Mobile App
 - Update a user's contact email address in the Mobile App
 - Turn a card on or off
 - Enable or disable ALL transaction controls and/or alerts
 - Send a test push notification to a user's primary device

Customer Support Tab

On Behalf Of Tab



The screenshot shows the FIS mConsole interface. At the top, there are tabs: Dashboard, Customer Support, Reports, FI Config View, and Unsubscribed Users. Below these, there are sub-tabs: Customer Troubleshooting, Reset Registration State, and On Behalf Of (which is selected and underlined). The 'On Behalf Of' section contains a 'Login Account Information' form with a 'Login Name' field. To the right of the form are three buttons: 'Disable Account', 'Enable Account', and 'Unsubscribe'. The 'Unsubscribe' button is highlighted with a red rectangular box. To the right of the screenshot, the word 'Click' is written in red.

Click

- Unsubscribe the user from the mobile app: the unsubscribed user will not be able to login to the app again with that profile; the card/user is not deleted from mConsole and can be found via a search in the Unsubscribed Users tab.
- If the user changes his/her mind and wants to use the app again later, the user will have to re-register (standalone user).
- Standalone users have to re-register; for integrated users, there is a workaround and a ticket to FIS Support has to be opened.
- A FI must unsubscribe a user from SecurLOCK™ Equip when closing the cardholder entry in the card processing system. There is no link between the two systems.
- **No user should ever be unsubscribed unless it is recommended by FIS or if the purpose is to remove the user because s/he no longer want to use the SecurLOCK Equip application.**
- **Under no circumstances should an integrated user be unsubscribed.**

Customer Support Tab

On Behalf Of Tab

Login Account Information **Click**

Login Name

- Click 'Disable Account' to disable the user's Mobile App login and prevent the user from logging in.
- Click 'Enable Account' to enable the user to log in to the Mobile App if the login is currently disabled.

Customer Information **Enter** **Click**

Contact Email Address

- Enter the Contact Email Address and click 'Update' to change the cardholder's contact email address.

Customer Support Tab

On Behalf Of Tab



The screenshot shows a 'Card Operations' window. On the left, there is a 'Select Card' label followed by a dropdown menu currently displaying 'Select a card'. This area is enclosed in a red rectangular box. To the right of this, there are four buttons arranged in a 2x2 grid: 'Card On', 'Card Off', 'All Alerts', and 'No Controls'. This button group is also enclosed in a red rectangular box.

Click

Select

- Select a card for On Behalf Of action from the list of all managed cards in the user's Mobile App.
- Turn a card on or off for the user by clicking on 'Card On' or 'Card Off'.
- Click 'All Alerts' to enable the user to receive alerts for all transactions made on the selected card.
- Click 'No Controls' to turn off all control settings for the selected card.

Customer Support Tab

On Behalf Of Tab

The screenshot shows the 'On Behalf Of' tab in the Customer Support section. The interface includes sections for Login Account Information, Customer Information, Card Operations, and Diagnostics. A red box labeled 'A. Click' highlights the 'Test Push Notification' button in the Diagnostics section. A red box labeled 'B. Enter' highlights the 'Test Message' input field in the 'Test Push Notifications' dialog box. A red box labeled 'C. Click' highlights the 'Test' button in the same dialog box. A red box labeled 'D. Click' highlights the 'Ok' button in the 'Info' dialog box that displays the message 'Notification sent successfully'.

- Send a test Push Notification to the user's primary device
- Click 'Test Push Notification' on the On Behalf Of screen
- Enter a message in the Test Push Notifications dialogue
- Click 'Test' and a notification window confirms that the test message was sent successfully.

Customer Support Tab

Reset Registration State Tab

The screenshot shows a web application interface with a top navigation bar containing tabs: Dashboard, Customer Support, Reports, FI Config View, and Unsubscribed. Below this is a sub-navigation bar with tabs: Customer Troubleshooting, Reset Registration State, and Register New User. The 'Reset Registration State' tab is selected. The main content area contains a text box labeled 'Enter card number:' with a red border. Below the text box are two buttons: 'Reset' and 'Clear'. A red arrow points to the 'Enter' key on the keyboard, and a red arrow points to the 'Reset' button. The text 'Click' is written in red above the 'Reset' button.

Dashboard Customer Support Reports FI Config View Unsubscribed Enter

Customer Troubleshooting Reset Registration State Click Register New User

During the User Registration process or while adding additional cards in the mobile application, the card may get locked from the registration process. To unlock the card from the registration process, enter the cardholder's complete card number (PAN) below. Once

Enter card number:

Reset Clear

- If a user enters incorrect authentication information three times during second factor authentication, they will be locked out of the registration process and will need to be reset by the financial institution to continue with registration.
- The financial institution can use the Reset Registration State tab to reset a card that has been locked out during registration.
- Navigate to the Customer Support tab and then to the Reset Registration State sub-tab.
- Enter card number and then click 'Reset'.

SecurLOCK™ Equip – mConsole Overview

Reports Tab

- Introduction
- View Generated Report tab
- View Scheduled report tab
- Create Report tab

Reports Tab

Introduction



- Use the Reports feature to view a range of reports related to your financial institution and configure parameters to generate custom reports.
- The Reports feature contains three components:
 - **View Generated Report:** View or export a generated report in CSV format:
 - One-time immediate report
 - One-time scheduled report for which the scheduled execution date has previously occurred
 - Recurring report for which at least the first possible execution date has passed
 - **View Scheduled Report:** View a pending report:
 - One-time report with a date later than today
 - Sequence of reports in which the next report is scheduled for later than today
 - **Create Report:** Create one-time or recurring Summary and Detailed reports.
 - **Summary Report:** User selects the report fields from the drop-down menu.
 - **Detailed Report:** User selects a report type from the drop-down menu.

Reports Tab

View Generated Report Tab

Dashboard
Customer Support
Reports
FI Config View
Unsubscribed Users

View Generated Report
View Scheduled Report
Create Report

Select FI : ALL

Select Generated Report

☒ Show All
☐ Search

List of Generated Reports

Action	Report Name	Report Date	Fis	Report Format	Report Type	Report Frequency	Report Period
1 Details Show Report	saa	09/10/2018		Per-FI	Summary	One-time	Aug 2018
2 Details Show Report	saa	09/10/2018		Per-FI	Summary	One-time	Aug 2018
3 Details Show Report	saa	09/10/2018		Per-FI	Summary	One-time	Aug 2018
4 Details Show Report	saa	09/10/2018	1P-516071-000	Per-FI	Summary	One-time	Aug 2018
5 Details Show Report	saa	09/10/2018	024364-545581-101	Per-FI	Summary	One-time	Aug 2018
6 Details Show Report	saa	09/10/2018	95-405323-196	Per-FI	Summary	One-time	Aug 2018
7 Details Show Report	saa	09/10/2018		Per-FI	Summary	One-time	Aug 2018
8 Details Show Report	saa	09/10/2018	386456-463820-100	Per-FI	Summary	One-time	Aug 2018
9 Details Show Report	saa	09/10/2018		Per-FI	Summary	One-time	Aug 2018
10 Details Show Report	saa	09/10/2018	032169-412125-180	Per-FI	Summary	One-time	Aug 2018

- Use the View Generated Report screen to view and manage existing reports.

Reports Tab

View Generated Report Tab

View Generated Report | View Scheduled Report | Create Report

Select FI : ALL

Select Generated Report

☒ Show All
☐ Search

Report Details

Report Name:	saa
Report Period:	Aug 2018
Report Generated On :	9/10/2018
Report Format:	CSV
Destination Email Address:	sathiy . ran@fisglobal.com,sath . 93@gmail.com
Report Type:	Summary
FIs:	ALL
Selected Fields:	Number of Subscribers Number of Transaction Updates

List of Generated Reports

Action	Report Name	Report Period	Report Generated On	Report Format	Destination Email Address	Report Type	FIs	Selected Fields	Report Frequency	Report Period
1 Details Show Report										
2 Details Show Report										
3 Details Show Report										
4 Details Show Report										
5 Details Show Report	saa	09/10/2018	024364-545581-101	Per-FI	Summary	One-time	Aug 2018			
6 Details Show Report	saa	09/10/2018	95-405323-196	Per-FI	Summary	One-time	Aug 2018			

Click

- When you click 'Details' on the View Generated Report screen, the Report Details window opens.
- The Report Details window summarizes information about the data contained in each selected report (details vary for recurring and one-time reports).

Reports Tab

View Generated Report Tab

View Generated Report | View

Select Generated Report

☒ Show All
☐ Search

List of Generated Reports

Action
1 Details Show Report
2 Details Show Report
3 Details Show Report
4 Details Show Report
5 Details Show Report

Summary Report View Export to XLS

Selected Report Details

Name of the Report : saa
Report Date: 09/10/2018 Report Type: Summary Report Frequency: One-time Report Period: Aug 2018
Selected FIs : 024364-545581-101

Number of Subscribers in Aug-2018: 3,873

Minimum Number of Subscribers in Last month: 3,873
Maximum Number of Subscribers in Last month: 3,873
Average Number of Subscribers in Last month: 3,873

Increase per month

Minimum Increase per month: 0
Maximum Increase per month: 0
Average Increase per month: 0

Period	Number of Subscribers
Aug-18	3,873

Number of Transaction Updates in Aug-2018: 3,065

Minimum Number of Transaction Updates in Last month: 3,065
Maximum Number of Transaction Updates in Last month: 3,065
Average Number of Transaction Updates in Last month: 3,065

Increase per month

Minimum Increase per month: 0
Maximum Increase per month: 0
Average Increase per month: 0

Period	Number of Transaction Updates
Aug-18	3,065

Action

1 [Details](#) | [Download Report](#)

- Users can click 'Show Report', next to the name of a Summary Report in the list of Generated Reports to display report details at the bottom of the screen. If the report is a Detailed Report, users can click 'Download Report' to download the report directly to their desktop.
- When a report is generated, it is emailed to the email address(es) provided when the report was created.
- Previously created Summary Reports can also be exported to an Excel worksheet via mConsole by using the 'Export to XLS' function on the top-right of the screen.

Reports Tab

View Scheduled Report Tab

Dashboard Customer Support **Reports** FI Config View Unsubscribed Users





View Generated Report View Scheduled Report Create Report

Select FI: ALL

Select Scheduled Report

☒ Show All
☐ Search

List of Scheduled Reports

Action	Report Name	FIs	Report Type	Report Frequency	Report Generated On
1  	Subscriber Report	ALL	Aggregate	One-time	Oct 2016
2  	Alerts Data	ALL	Aggregate	One-time	Oct 2016

10 Page 1 of 1

- The View Scheduled Report screen lists all scheduled reports and allows you to manage the details of each report.

Reports Tab

View Scheduled Report Tab – View Details

Dashboard Customer Support Reports FI Config View Unsubscribed Users

View Generated Report View Scheduled Report Create Report

Select Scheduled Report

Show All Search

List of Scheduled Reports

Action	Report Name	FIs	Report Type	Report Frequency	Report Generated On
1	Subscriber Report	ALL	Aggregate	One-time	Oct 2016
2	Alerts Data	ALL	Aggregate	One-time	Oct 2016

10 Page 1 of 1

Selected Report Details

Active:

Report Name: Alerts Data

Report Period: Last three months

Report Generated On : 10/12/2016

Report Format: CSV

Destination Email Address: vicki.wolfe@ondotystems.com

Report Type: Aggregate

FIs: ALL

Selected Fields:

- Number of Alerts
- Number of Merchant Type Alerts
- Number of Transaction Type Alerts
- Number of Subscriber Location Alerts
- Number of Spend Limits Per Month - Alerts
- Number of Spend Limits Per Transaction - Alerts
- Number of 1-way Fraud Alerts
- Number of 2-way Fraud Alerts
- Number of Responses to Fraud Alerts

Double click

View

- Select a report in the List of Scheduled Reports to display the report details.
- By default, this tab displays all scheduled reports sorted by date and time. Use key words to search for specific scheduled reports.
- A green check indicates that the report is enabled; a red X indicates that it is disabled. Click the icon to toggle between enabling and disabling the report.
Note: Scheduled Reports must be manually enabled after creation.
- To delete the selected report, click the

Reports Tab

Create Report Tab

Dashboard Customer Support **Reports** FI Config View Unsubscribed Users

View Generated Report View Scheduled Report **Create Report**

Select FI : ALL Save Clear

Enter Report Title and Description

Name of the Report: Enter Name of the Report

Description of the Report: Enter Description of the Report

Reporting Details

One Time Recurring

Generate Report On: 8/9/2018

Month(s) of Data in Report: Last Month

Select Report Type

Summary Reports Detailed Reports

Select the Fields to be Included in the Report

Summary Report Fields

Number of Subscribers
Number of New Subscribers
Max Number of Active Subscribers
Number of Transaction Updates
Number of Alerts
Number of Notifications
Number of Merchant Type Alerts
Number of Transaction Type Alerts
Number of Subscriber Location Alerts
Number of Spend Limits Per Transaction - Alerts

Select Format and Delivery

☐ Create a Separate Report per Financial Institution

Delivery Email Addresses: Enter email addresses here. Separate email addresses by ","

- The Create Report tab includes two sub-tabs that allow mConsole users to choose between Summary Reports and Detailed Reports.
- Use the Create Report screen to create One Time or Recurring Summary and Detailed reports.

Reports Tab

Creating a Detailed Report

Enter

Enter Report Title and Description

Name of the Report:

Description of the Report:

Reporting Details

One Time | Recurring

Generate Report On:

Month(s) of Data in Report:

Select Report Type

Summary Reports | Detailed Reports

Report Type:

- Active User Report - Current Month
- Active User Report - Last Month [With Transactions]
- InActive User Report [Last Month]
- Incomplete Registration Report

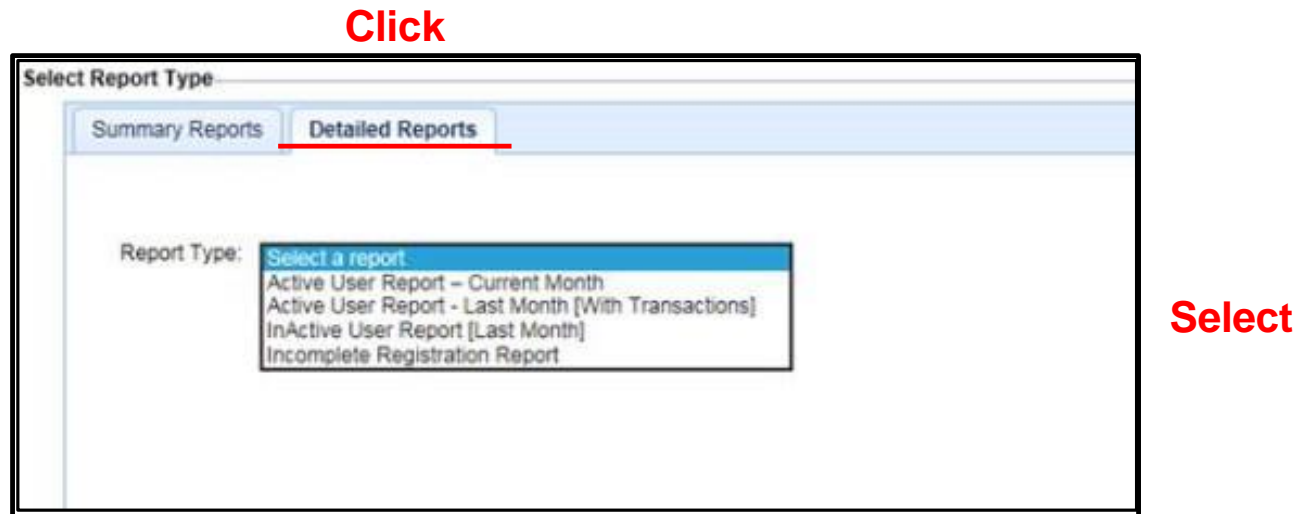
Enter

Select

- Enter a Report Name and a description for the report.
- Under Reporting Details, select the report frequency, One Time or Recurring, and enter the required information.
 - One Time: Choose date to generate the report on and Months of Data to include in the report.
 - Recurring: Choose report Starting and Ending date, day of the month to generate report on, Months of Data to include in the report.

Reports Tab

Creating a Detailed Report





- Under **Select Report Type**, click **'Detailed Reports'**.
- **Select a Report Type** from the drop-down list of available pre-set reports.



Reports Tab

Creating a Detailed Report

Reporting Details


One Time **Recurring**

Generate Report On: 9/10/2018  

Month(s) of Data in Report: Last Month  

Select Format and Delivery

☐ Create a Separate Report per Financial Institution

Delivery Email Addresses: 

Select

Enter

- Under **Select Format and Delivery**, select the Report format.
- Enter the email addresses to which the report should be sent. Multiple email addresses can be entered separated by commas.
- Click 'Save' at the top-right of the screen.

Reports Tab

Creating a Summary Report

Enter

Dashboard Customer Support **Reports** Administration FI Onboarding FI Config View Unsubscribed Users

View Generated Report View Scheduled Report **Create Report**

Select FI : ALL Save Clear

Enter Report Title and Description

Name of the Report: Enter Name of the Report

Description of the Report: Enter Description of the Report

Reporting Details

One Time Recurring

Generate Report On: 8/9/2018

Month(s) of Data in Report: Last Month

Select Report Type

Summary Reports Detailed Reports

Select the Fields to be Included in the Report

Summary Report Fields

Number of Subscribers
Number of New Subscribers
Max Number of Active Subscribers
Number of Transaction Updates
Number of Alerts
Number of Notifications
Number of Merchant Type Alerts
Number of Transaction Type Alerts
Number of Subscriber Location Alerts
Number of Spend Limits per Month - Alerts
Number of Spend Limits Per Transaction - Alerts

Select Format and Delivery

☐ Create a Separate Report per Financial Institution

Delivery Email Addresses: Enter email addresses here. Separate email addresses by ", "

Select

- Enter a Report Name and a description for the report.
- Under Select Report Type, click 'Summary Reports'.
- In the 'Select the Fields to be Included in the Report' pane, select the fields you want to include in the report. To select multiple fields at once, press and hold CTRL while you select the fields.

Reports Tab

Creating a Summary Report

Select

The screenshot shows the 'Create Report' form in the Reports Tab. The form is divided into several sections: 'Enter Report Title and Description', 'Reporting Details', 'Select Report Type', and 'Select Format and Delivery'. The 'Reporting Details' section is highlighted with a red box and contains a red arrow pointing to the 'One Time' tab. The 'Select Report Type' section is also highlighted with a red box and contains a red arrow pointing to the 'Summary Reports' tab. The 'Select Format and Delivery' section is highlighted with a red box and contains a red arrow pointing to the 'Create a Separate Report per Financial Institution' checkbox. The 'Select Report Type' section shows a list of fields to be included in the report, with a red arrow pointing to the 'Number of Subscribers' field. The 'Select Format and Delivery' section shows a list of fields to be included in the report, with a red arrow pointing to the 'Number of Subscribers' field.

- Click the right arrow to move the selected fields into the Summary Report Fields pane.
- Under Reporting Details, select the report frequency, One Time or Recurring, and enter the required information.
 - One Time: Choose date to generate the report on and Months of Data to include in the report.
 - Recurring: Choose report Starting and Ending date, day of the month to generate report on, Months of Data to include in the report

Reports Tab

Creating a Summary Report

View Generated Report View Scheduled Report **Create Report**

Select FI: ALL Save Clear

Enter Report Title and Description

Name of the Report:

Description of the Report:

Reporting Details

One Time **Recurring**

Generate Report On:

Month(s) of Data in Report:

Select Report Type

Summary Reports **Detailed Reports**

Select the Fields to be Included in the Report

- Number of Subscribers
- Number of New Subscribers
- Max Number of Active Subscribers
- Number of Transaction Updates
- Number of Alerts
- Number of Notifications
- Number of Merchant Type Alerts
- Number of Transaction Type Alerts
- Number of Subscriber Location Alerts
- Number of Spend Limits per Month - Alerts
- Number of Spend Limits Per Transaction - Alerts

Summary Report Fields

Select Format and Delivery

☒ Aggregate All Financial Institutions **Select**

☐ Show Each Financial Institution Separately

☐ Create a Separate Report per Financial Institution

Delivery Email Addresses: **Enter**

- Under **Select Format and Delivery**, select the Report format and enter the email addresses to which the report should be sent.
- Click **'Save'** at the top right of the screen.

SecurLOCK™ Equip – mConsole Overview

Financial Institution Config View

Dashboard
Customer Support
Reports
FI Config View
Unsubscribed Users

FI Details

Name	Value
1 Active	Yes
2 FI Token	1101
3 Alias 1	Alias_1
4 Alias 2	Alias_2
5 FI Name	101
6 Contact Email Address	@fsglobal.com
7 Billing Email Address	@fsglobal.com

Branding Info

Name	Value	Actual Image Size
1 FI Logo	View Image	1240x300 px Image
2 Card FI Logo	View Image	740x200 px Image
3 Card Image Front - default	View Image	800x506 px Image
4 Terms And Conditions	View HTML	N/A
5 Privacy Policy	View HTML	N/A

Issuer System Details

Issuer System ID	FI Token	Issuer System Name	Issuer System Token	Issuer System To	Issuer System To Switch	Description	Issuer Backend System	Supported BIN
1 72		024364-545581-101		Alias_2	FISC		Credit	

BIN Details

BIN ID	Issuer System Token	BIN Number	BIN Length	Currency Code	Card Type	Default Card State	Unique Card Numbers	Default Primary
1 69			9	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary
2 164			6	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary
3 2315			6	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary

Assigned Apps

App Display Name	App Token	Registration Flow	Authentication Party	Update FI Data to AppFactory
1		Single Step Registration	Local Authentication	false
2 MConsole OBO App	MConsoleOBOApp	Single Step Registration	Local Authentication	false
3 SECURLOCK EQUIP	FISSecurLOCKEquip	Multi Step Registration	Local Authentication	false

- The FI Config View is a view-only screen that provides an overview of the configuration parameters that have been set up for the financial institution.
- Only FI Admins can view information on this screen.

SecurLOCK™ Equip – mConsole Overview

Financial Institution Config View

- The FI Config View screen is divided into five sections:
 - FI Details
 - Branding Info
 - Issuer System Details
 - BIN Details
 - Assigned Apps

FI Details		
Name	Value	
1 Active	Yes	
2 FI Token	1101	
3 Alias 1	Alias_1	
4 Alias 2	Alias_2	
5 FI Name	-101	
6 Contact Email Address	@fisglobal.com	
7 Billing Email Address	@fisglobal.com	
8 <		

Branding Info		
Name	Value	Actual Image Size
1 FI Logo	View Image	1240x300 px image
2 Card FI Logo	View Image	740x200 px image
3 Card Image Front - default	View Image	800x506 px image
4 Terms And Conditions	View HTML	N/A
5 Privacy Policy	View HTML	N/A

Issuer System Details									
Issuer System ID	FI Token	Issuer System Name	Issuer System Token	Issuer System To	Issuer System To	Switch	Description	Issuer Backend System	Supported BIN
1 72	1101	024364-545581-101	1101		Alias_2	FISC		Credit	

BIN Details									
BIN ID	Issuer System Token	BIN Number	BIN Length	Currency Code	Card Type	Default Card State	Unique Card Numbers	Default Primary	
1 69	1101		9	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary	
2 164	1101		6	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary	
3 2315	1101		6	US Dollars Numeric	Credit - C-7	Active - C-2	unique	primary	

Assigned Apps					
App Display Name	App Token	Registration Flow	Authentication Party	Update FI Data to AppFactory	
1		Single Step Registration	Local Authentication	false	
2 MConsole OBO App	MConsoleOBOApp	Single Step Registration	Local Authentication	false	
3 SECURLOCK EQUIP	FISSecurLOCKEquip	Multi Step Registration	Local Authentication	false	

SecurLOCK™ Equip – mConsole Overview

Unsubscribed Users

Dashboard Customer Support Reports FI Config View **Unsubscribed Users** Enter

FI Name Start Date End Date Click

Search Results

FI Name	BIN	Card Number	Subscriber Name	Customer Name	Email	Phone Number	Subscriber Ref ID	Account Number	Enrolled Date
	533232001	XXXX XXXX XXXX 1148		BGRUAT TESTSIX			XPRESS_D7D2EE62-C94B-4DC4-8		15-Mar-201
	533232001	XXXX XXXX XXXX 1130		SIT TESTFIVE	@fisglobal.com		john1		13-Aug-20

Click Export to XLS

- Use the Unsubscribed Users tab to find users who have unsubscribed from the Mobile App.
- Unsubscribed Users will no longer appear on the Customer Troubleshooting tab.
- Unsubscribed Users search results can be downloaded via an 'Export to XLS' button on the Unsubscribed Users screen.
- 31 days is the max date range when searching for unsubscribed users, but their records will never be deleted from the database.

SecurLOCK™ Equip – mConsole Overview Review

- [Access mConsole - pg. 4](#)
- [Dashboard tab - pg. 11](#)
- [Customer Support tab - pg. 25](#)
- [Reports tab - pg. 54](#)
- [Financial Institution \(FI\) Config View tab - pg. 68](#)
- [Unsubscribed Users - pg. 70](#)

Empowering
the Financial World



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