

SecurLOCK™ Equip - mConsole Overview

July 2018

Empowering
the Financial World



SecurLOCK™ Equip – mConsole Overview

Introduction

- Access mConsole
- Dashboard tab
- Customer Support tab
- Reports tab
- Financial Institution (FI) Config View tab

SecurLOCK™ Equip – mConsole Overview

Objectives

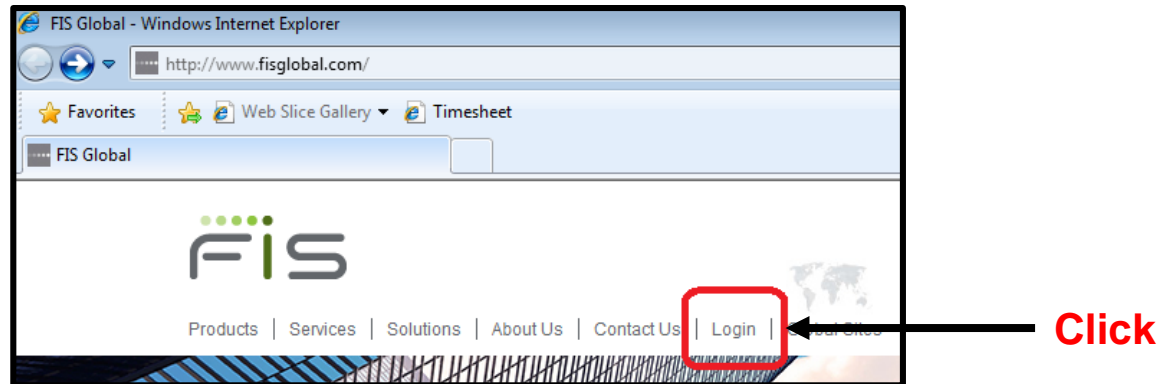
- Describe the basic functions of the mConsole application.
- Understand how to use the mConsole application to provide support for the SecurLOCK™ Equip users and analyze system usage.
- Understand how to navigate between the different application screens.

SecurLOCK™ Equip – mConsole Overview

Access mConsole

Access the mConsole application by using FIS eAccess.

1. Enter this URL: www.fisglobal.com



2. Click Login.

SecurLOCK™ Equip – mConsole Overview

Access mConsole



3. Click Login.

The screenshot shows the FIS eAccess login page. At the top, there is a header with the FIS logo and the text 'FIS eAccess'. Below this is a 'Login' section. The text reads: '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 are two input fields: 'User ID:' and 'Password:'. A red box is drawn around these two fields. To the right of the red box, the text 'A. Enter' is written. Below the input fields is a 'Login' button. An arrow points from the text 'B. Click' to this button. At the bottom of the page, there is a link: 'Did you forget your password?'.

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

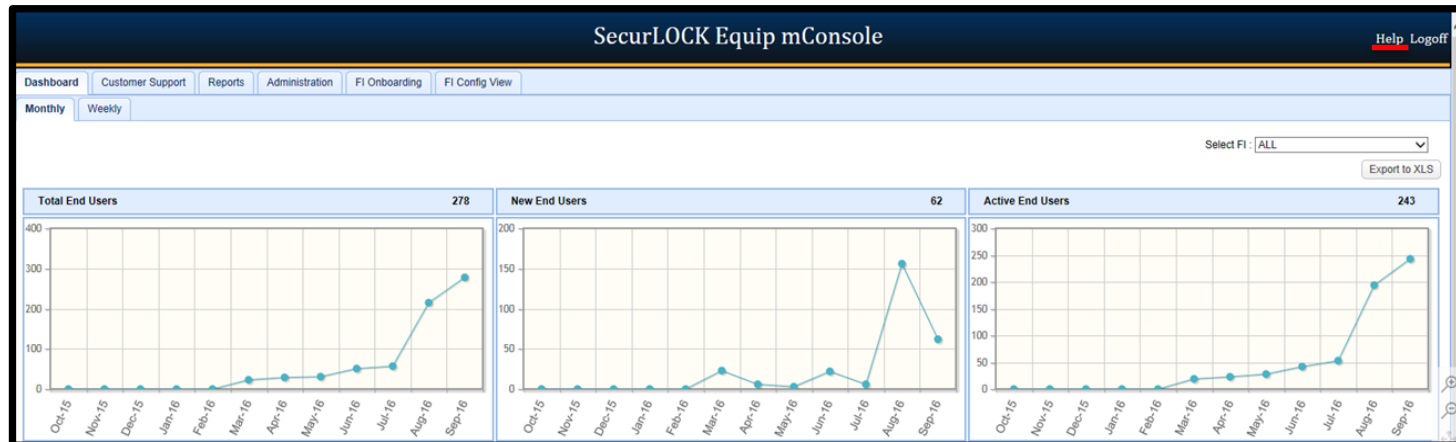
SecurLOCK™ Equip – mConsole Overview

Access mConsole



C. Click

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



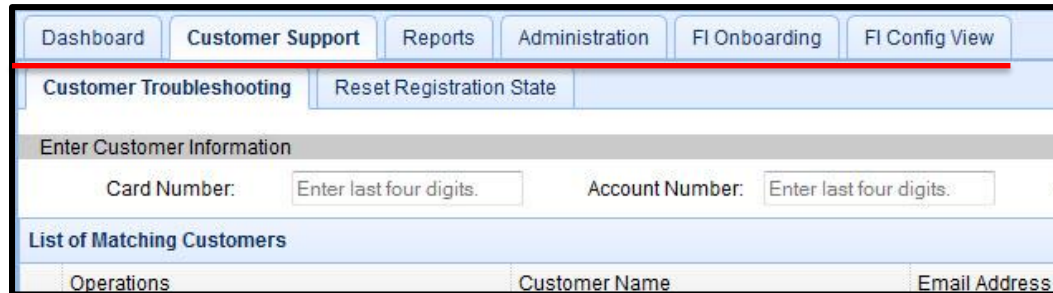
Help

6. The SecurLOCK Equip mConsole app will open in a new browser tab.

*** The "Help" link provides additional, detailed information about each field.**

SecurLOCK™ Equip – mConsole Overview

Access mConsole



The screenshot displays the SecurLOCK mConsole interface. At the top, there is a navigation bar with tabs: Dashboard, Customer Support, Reports, Administration, FI Onboarding, and FI Config View. Below this, a sub-navigation bar includes Customer Troubleshooting and Reset Registration State. The main content area is titled 'Enter Customer Information' and contains two input fields: 'Card Number: Enter last four digits.' and 'Account Number: Enter last four digits.'. Below the input fields is a section titled 'List of Matching Customers' which contains a table with columns: Operations, Customer Name, and Email Address.

- An FI'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 based on the user privileges: Dashboard, Cardholder Support, Reports, FI Config View.
- Information within the application can help track a customer's usage.
- FIS Client/Customer Support can also access this application (see Slide #23).

SecurLOCK™ Equip – mConsole Overview

Access mConsole

Group Name roles:	FI Admin	FI User	FI User - limited
Recommended Access Privileges	FI Tech Support and 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		
Custom Report			
FI Config View			
FI Config View	X		

SecurLOCK™ Equip – mConsole Overview

Access mConsole

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

SecurLOCK™ Equip – mConsole Overview

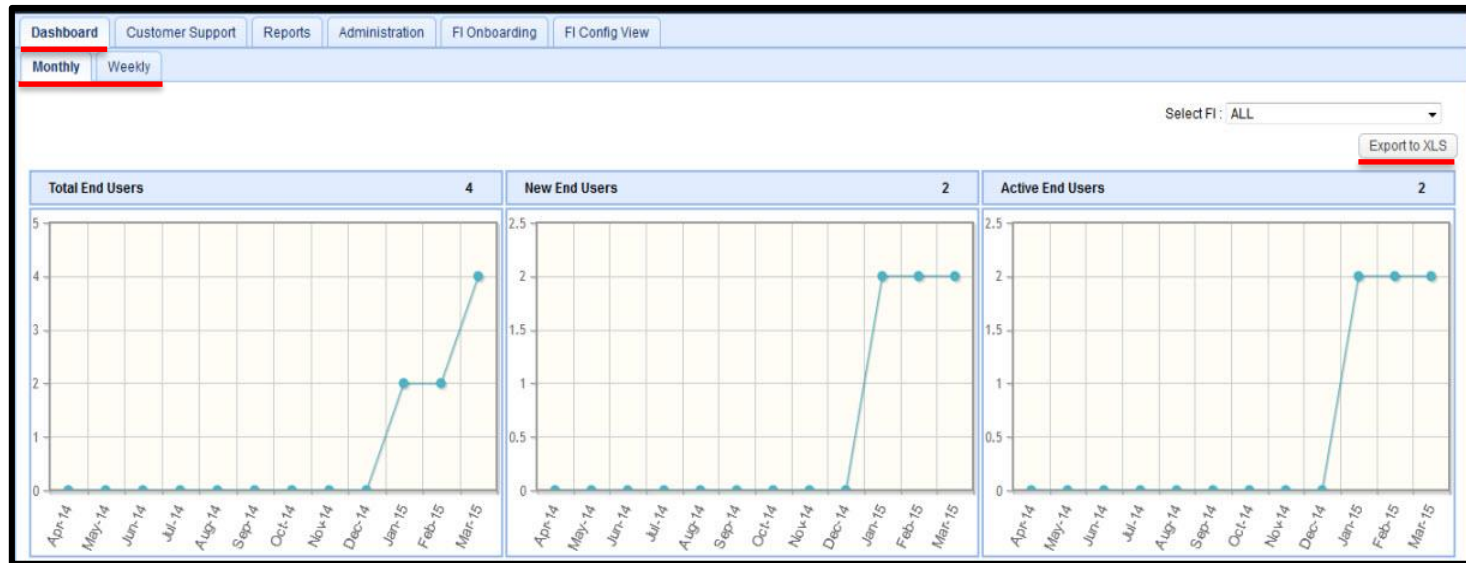
Dashboard Tab

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

Dashboard Tab

General Information

View
options



Export

- The Dashboard information can be viewed on a Monthly or Weekly basis by selecting the appropriate tabs.
- An FI's users can only view information specific to that FI.
- The raw data of the graphs in Dashboard view can be exported to Excel using the "Export to XLS" function.
- An agent bank's users can choose a specific FI or all FI's to view 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

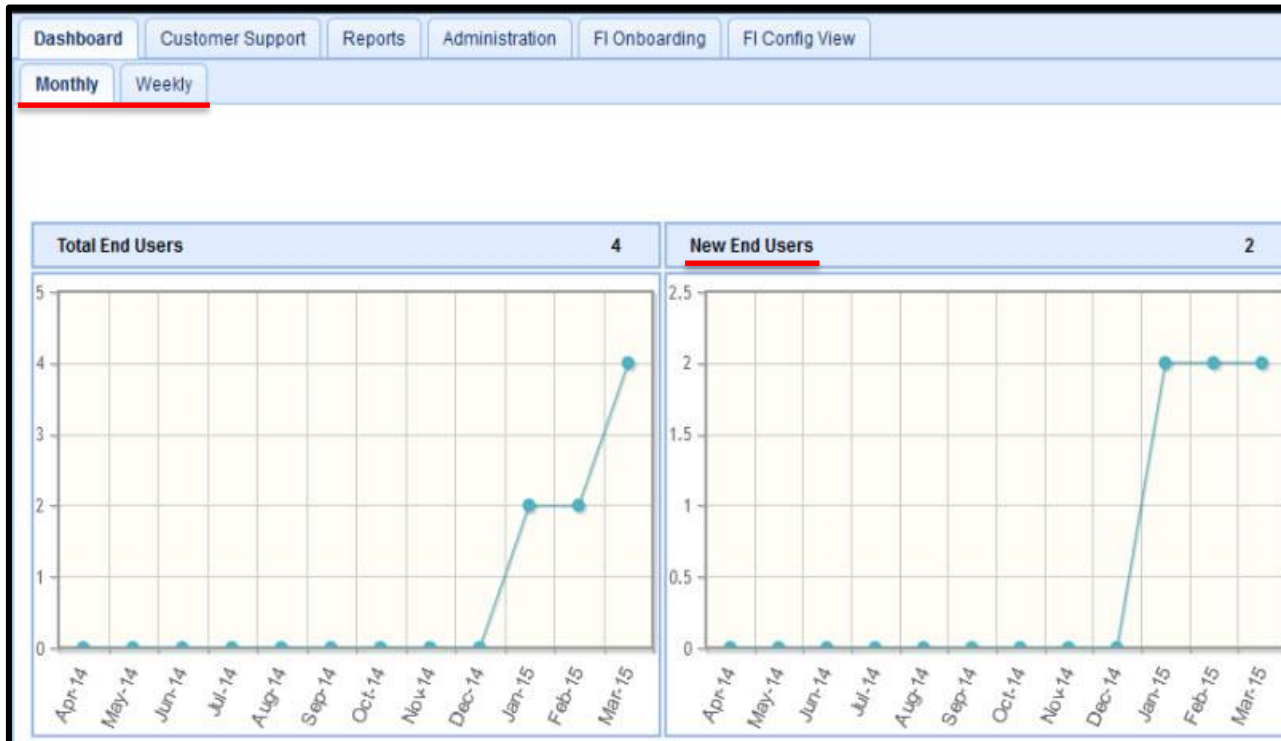
Total End Users Portlet



- The Dashboard screen is the default landing page when users first login. It provides key metrics reports related to registration, transaction alerts and controls.
- Provides current data from the previous day.
- The Total End Users portlet shows the total cumulative number of registered users in the system by month or week.

Portlets

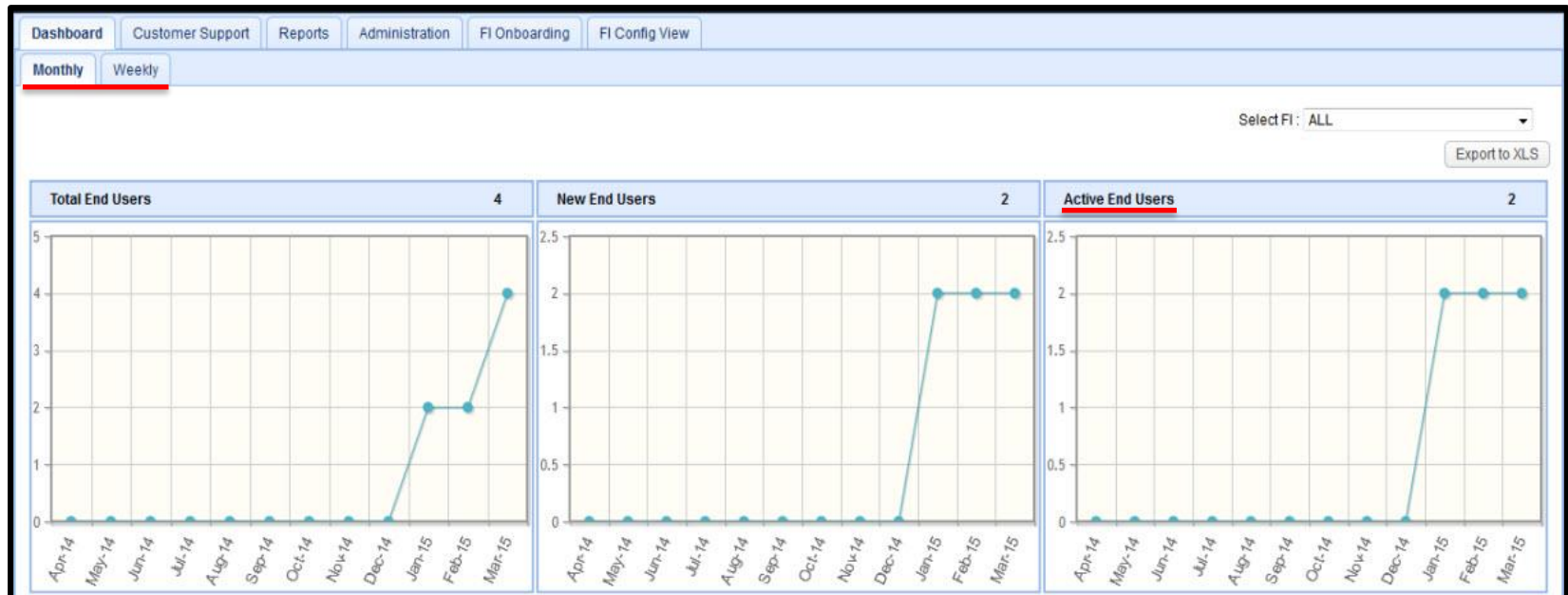
New End Users Portlet



- The New End Users portlet shows the total number of newly registered users that have been added to the system by month or week.

Portlets

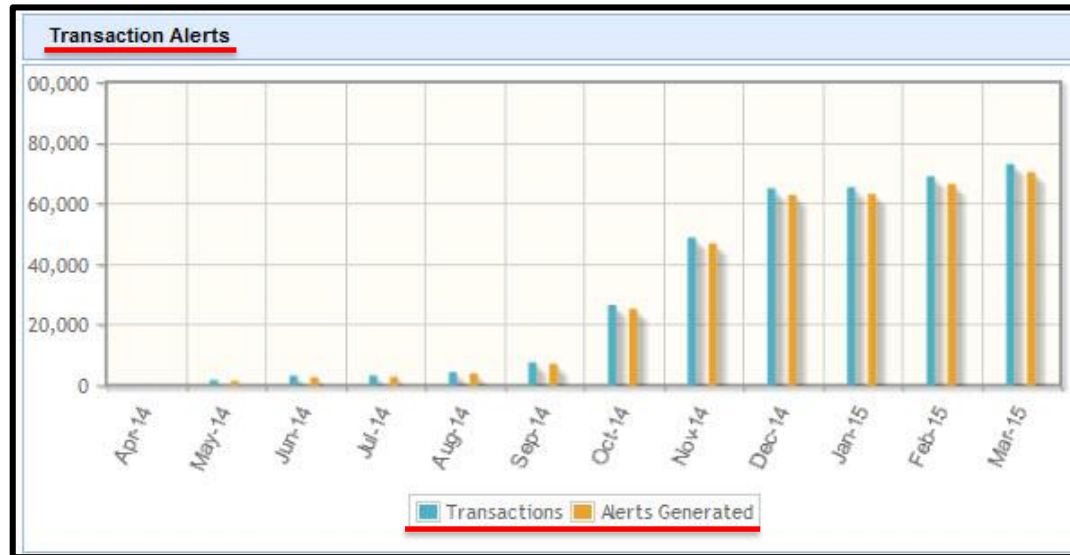
Active End Users Portlet



- The Active End Users portlet shows the number of active users by week or month.
- An active user is one who has made a card transaction or received an alert within a given calendar week or month.

Portlets

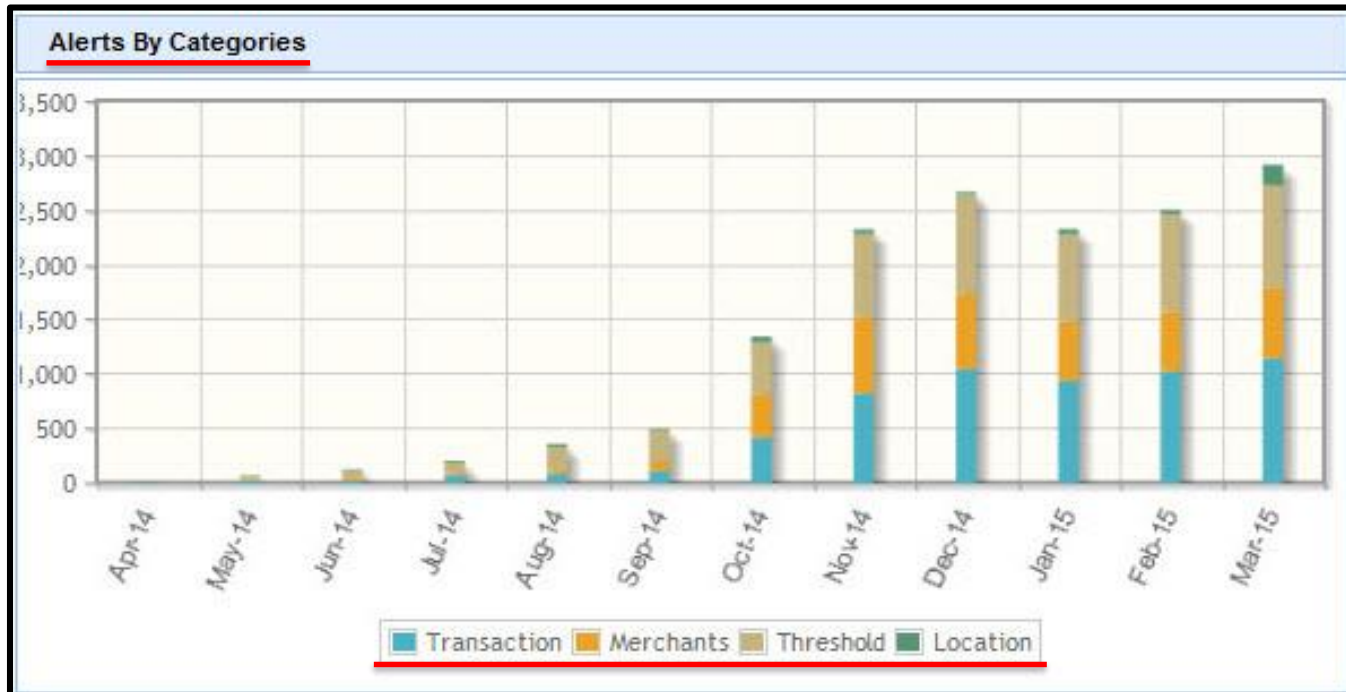
Transaction Alerts Portlet



- **The Transaction Alerts portlet shows data regarding transaction alerts going through the system by month.**
- **This graph consists of two key pieces of data:**
 - **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

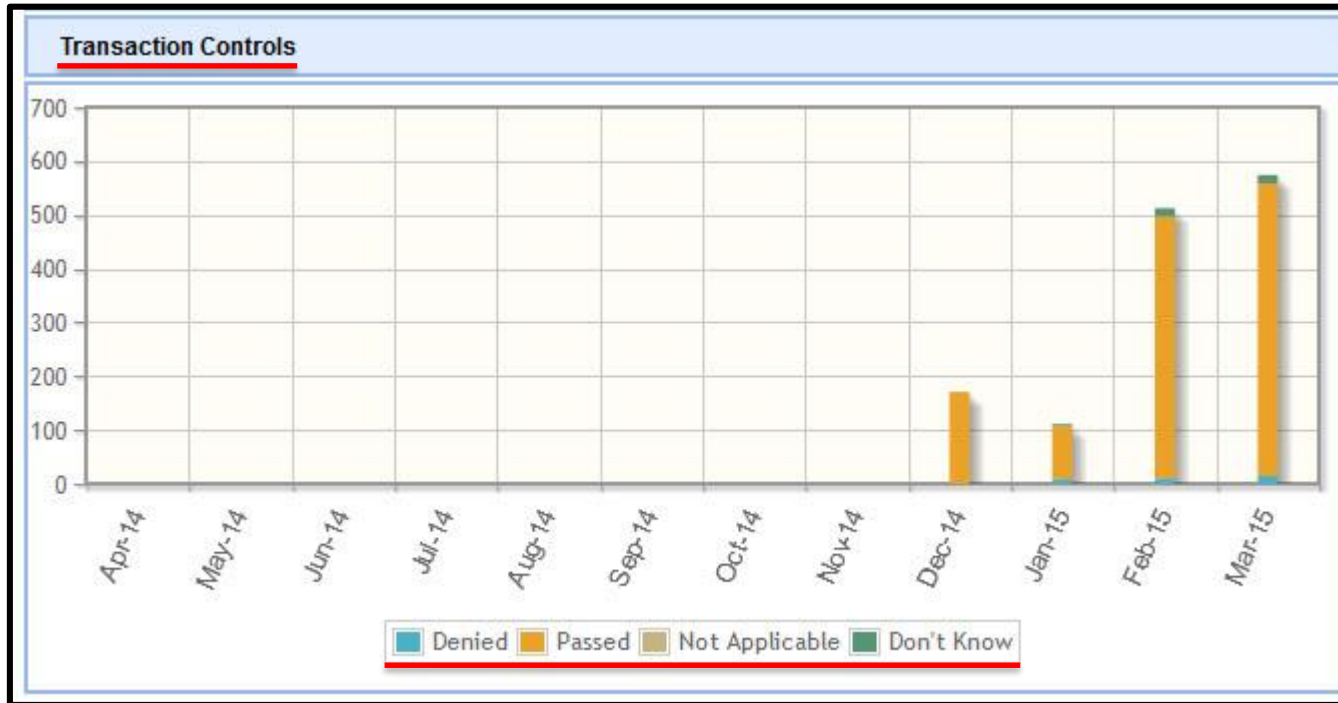
Alerts By Category Portlet



- The Alerts By Categories portlet shows the number of alerts in a given period by category.
- Four categories are shown: 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

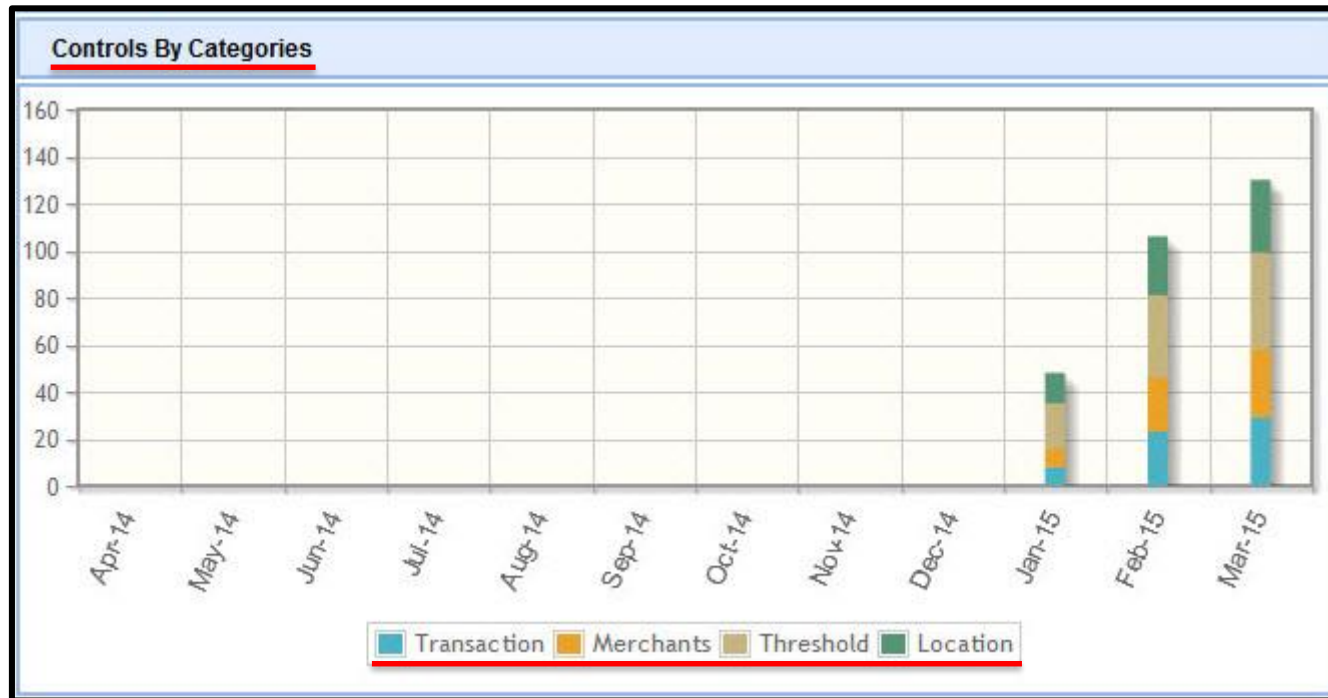
Transaction Controls Portlet



- The Transaction Controls portlet shows data regarding controls going through the system.
- The data is separated into four segments: Denied, Passed, Not Applicable, Don't Know.

Portlets

Controls By Categories Portlet



- The Controls By Category portlet shows the number of controls in a given period by category.
- Controls are divided into four categories, which correspond to policies set by the customer within the application: Transaction (Type), Merchants (Type), Location, and Threshold.

Access mConsole

Export Data To a Spreadsheet



Dashboard Customer Support Reports Administration FI Onboarding FI Config View

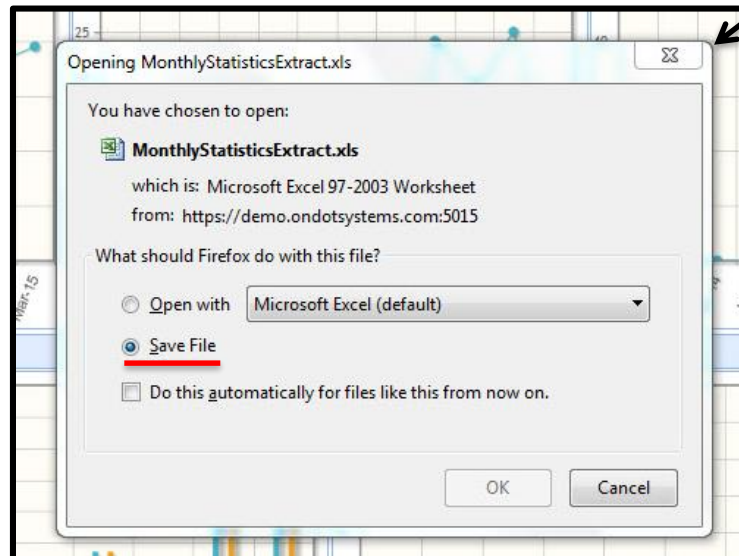
Monthly Weekly

Selected FI: ALL

Export to XLS

Total Customers	14	New Customers	1	Active Customers	1
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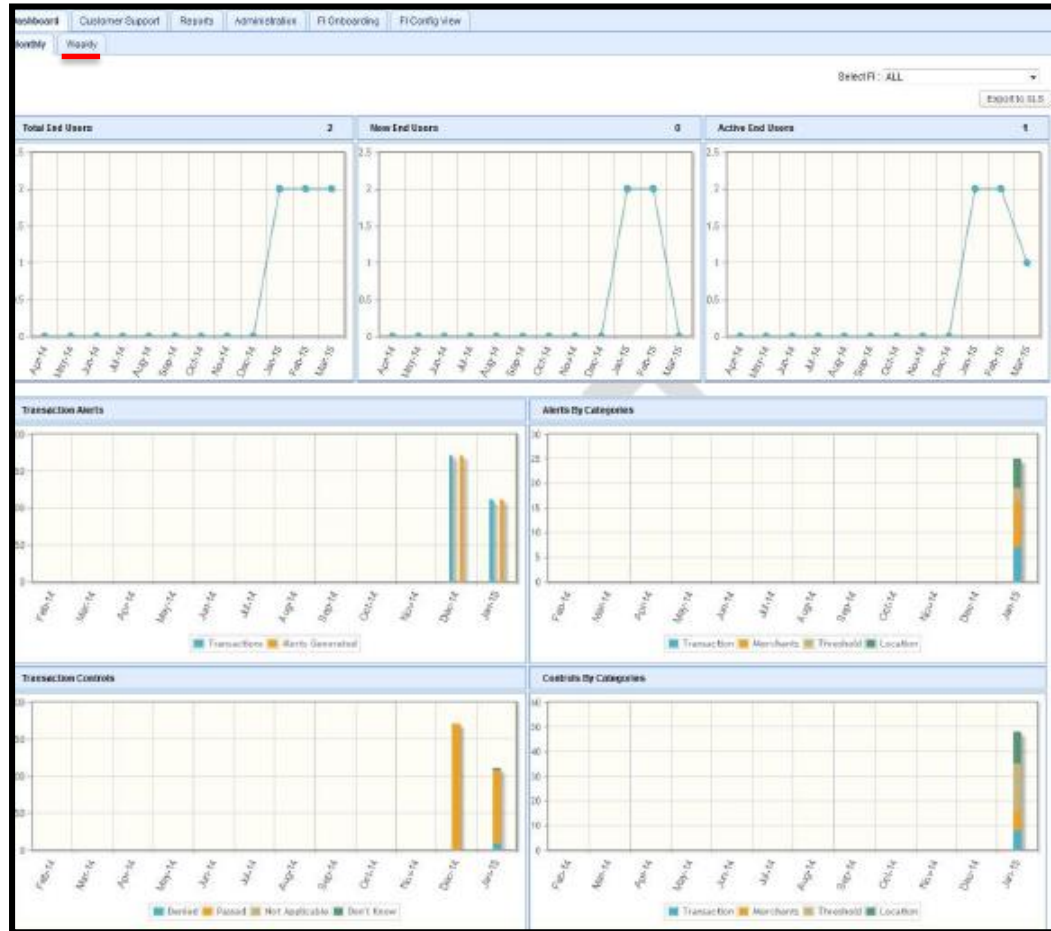
Click



- Information from a portlet can be exported to a spreadsheet.

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**
- **Customer Details tab**
- **Customer Activity tab**
- **On Behalf Of tab**

Customer Support Tab

General Information

The screenshot displays the 'Customer Support' tab in a web application. At the top, there is a navigation bar with tabs: Dashboard, Customer Support (highlighted), Reports, Administration, FI Onboarding, and FI Config View. Below this, there are sub-tabs: Customer Troubleshooting and Reset Registration State. The main section is titled 'Enter Customer Information' and contains search filters: Card Number (with a hint 'Enter last four digits'), Account Number (with a hint 'Enter last four digits'), Customer Name (with a hint 'a'), and Customer ID (with a hint 'Enter full ID'). To the right of these filters are search and reset icons. Below the filters is a section titled 'List of Matching Customers' which contains a table with 5 rows of customer data. Each row has a number, a set of links ('Customer Details | Activity Viewer | On Behalf Of'), and five columns: Customer Name, Email Address, Login Name, and FI Name. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a status message 'Displaying 1 to 4 of 4 items'.

	Operations	Customer Name	Email Address	Login Name	FI Name
1	Customer Details Activity Viewer On Behalf Of	Eswari Periyasamy	manikandan@ondotssystems.com		Certified First National
2	Customer Details Activity Viewer On Behalf Of	Manikandan Periyasamy	manikandan@ondotssystems.com	manikandanp	Certified First National
3	Customer Details Activity Viewer On Behalf Of	Manikandan Periyasamy	manikandan@ondotssystems.com	demouser1	Certified First National
4	Customer Details Activity Viewer On Behalf Of	Jeane Walden	chris@ondotssystems.com	demouser2	Certified First National
5	Customer Details Activity Viewer On Behalf Of	Sheeba Gangam	aurovind@ondotssystems.com	goldend329	Certified First National

- **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 customers.
 - View customer's details and their associated cards, transactions, and messages.
 - View all actions the user took on the device.
 - Assist the user by performing specific user-limited functions, when the user does not have access to the device.

Customer Support Tab

Customer Troubleshooting Tab - Customer Search

Dashboard Customer Support Reports Administration FI Onboarding FI Config View

Customer Troubleshooting Reset Registration State

Enter Customer Information



Card Number: Enter last four digits Account Number: Enter last four digits Customer Name: a Customer ID: Enter full ID

List of Matching Customers

Operations	Customer Name	Email Address	Login Name	FI Name
Customer Details Activity Viewer On Behalf Of	Eswari Periyasamy	manikandan@ondotsystems.com		Certified First National
Customer Details Activity Viewer On Behalf Of	Manikandan Periyasamy	manikandan@ondotsystems.com	manikandanp	Certified First National
Customer Details Activity Viewer On Behalf Of	Manikandan Periyasamy	manikandan@ondotsystems.com	demouser1	Certified First National
Customer Details Activity Viewer On Behalf Of	Jeane Walden	chris@ondotsystems.com	demouser2	Certified First National
Customer Details Activity Viewer On Behalf Of	Sheeba Gangam	aurovind@ondotsystems.com	goldend329	Certified First National

Page 1 of 1

Displaying 1 to 4 of 4 items

- mConsole users can search for customers by using one or several of the following search criteria (no wildcards):
 - Last 4 digits of the card number.
 - Account number linked to the card – not functional.
 - Partial customer name (first or last) or login id.
- To search, type the information in the appropriate box(es), then tap the magnifying glass  icon.
- To clear all search criteria and results, tap on the Clear icon. 
- The Customer ID field should not be used for searching.

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 the 'Customer Troubleshooting' sub-tab selected. 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 customer information. The default **Customer Details** page shows the following sections:
 - Customer Information entered by the customer through the app
 - Customer Information retrieved from the FI's system of record
 - Information on the customer's primary device
 - Customer's Cards, Transactions, and Account/Card Alerts

Customer Support Tab

Customer Troubleshooting Tab – Customer Details Display

Customer Details

Customer Information from User		Customer Information from FI		Primary Device Information	
Subscriber ID	2	Customer ID	XXXX XXXX XXXX 0001	Device Type	iOS
Financial Institution	Certified First National	Customer Name	Manikandan Periyasamy	OS Version	8.1.3
Full Name	Dave Golden	Email Address Registered with FI	manikandan@ondotssystems.com	Application Version	3.0.11.iOS.11
Login Name	demouser1	Phone Number		Notification Token	28bcde418cfad7b4c4859c237e4c...
Email Address	dave@ondotssystems.com	Phone Type		Last Login Name	demouser1
Phone Number				Current Network	lo0
Status	Active			Current Country	United States

Show Activity Viewer

Accounts Cards Transactions Account/Card Alerts

- The information displayed at the top of the Customer Details tab may be useful to a Customer Support rep in helping resolve a customer's issues.
- The Accounts sub-tab at the bottom of the Customer Details page is not used.

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	6b871ecde92015ceaae55e28ede2...
Last Login Name	
Current Network	lo0
Current Country	United States

- Images on the left are examples from SecurLOCK Equip stand-alone product
- 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

The screenshot shows the mConsole interface with the 'Customer Support' tab selected. Under 'Customer Details', the 'Cards' sub-tab is active. A table lists cards with columns for 'Active', 'Managed', 'Card Number', and 'Card Type'. The first card is highlighted with a red box and the text 'Double click' in red. An arrow points from this card to a 'Card Details' pop-up window.

Customer Information from User

Subscriber ID	9
Financial Institution	Ondot Systems
Full Name	Trinh Do
Login Name	trinh3
Email Address	trinh@ondotsystems.com
Phone Number	
Status	Active

Accounts **Cards** **Transactions** **Account/Card Alerts**

	Active	Managed	Card Number	Card T
Debit - 2 Item(s)				
1	✓	✓	XXXX XXXX XXXX 0023	Debit
2	✓	✓	XXXX XXXX XXXX 0024	Debit

Card Details

Card Information

Card Number	XXXX XXXX XXXX 0912
Cardholder Name(s)	ROGER STANLY
Card Status	Active
Cardholder Primary	✓
Active	✓
Card Enabled	✓
Card Issue Date	01-12-2015
Card Expiration Date	12-2018
Card Number Unique	✓
Is Primary	✓
Managed	✓
BIN Number	467271
Card Type	Debit
Spent This Month	\$0.00
Home Country	United States
Create Time	Tue Dec-15-2015 13:58:45 CST
Last Update Time	Fri Jan-29-2016 01:36:04 CST

Card Alerts
Card Controls
Shared Card Users

- To view Card information, the user clicks on the Cards sub-tab.
- 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 (CST).

Customer Support Tab

Customer Details Tab - Cards Tab – Card Alerts

The screenshot shows a 'Card Details' pop-up window with a close button in the top right. It features four expandable/collapsible sections: 'Card Information', 'Card Alerts' (highlighted in yellow), 'Card Controls', and 'Shared Card Users'. The 'Card Alerts' section contains a table with alert preferences.

Alert Type	Preferred Transactions
My Location Alerts Enabled	✓
My Region Alerts Enabled	✓
Alert Region 1	📍 Green Bay
Alert Region 2	📍 London
International Alerts Enabled	✗
Merchant Alerts Enabled	✓
Merchant Types Selected	Department Stores, Gas Stati...
Transaction Alerts Enabled	✓
Transaction Types Selected	In Store, Online, Mail/Phone...
Spend Limit Alerts Enabled	✓
Spend Limit per Transaction	\$200.00

- The Card Details pop-up screen 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 closing 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 'Card Information', 'Card Alerts', and 'Card Controls'. The 'Card Controls' section is highlighted in yellow. The main area displays a list of controls with their status and values. Two items are highlighted with red boxes: 'My Location Subscriber Name' with the value 'Charles A Mouse' and 'Transaction Types Selected' with the value 'In Store, Online, Mail/Phone Order, Auto Pay, ATM, Others'.

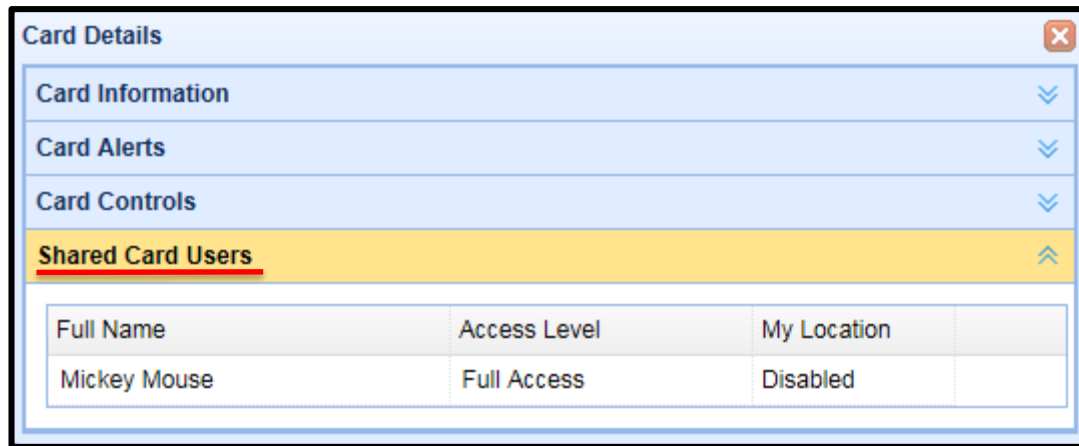
Control	Status/Value
My Location Controls Enabled	✓
My Location Subscriber Name	Charles A Mouse
My Location Subscriber Reference ID	148befa4ondot01e3sub47d790cd...
My Region Controls Enabled	✓
Control Region 1	Green Bay
Control Region 2	Menominee / Marinette
Block International Control Enabled	✗
Merchant Controls Enabled	✗
Transaction Controls Enabled	✓
Transaction Types Selected	In Store, Online, Mail/Phone Order, Auto Pay, ATM, Others
Spend Limit Controls Enabled	
Spend Limit per Transaction	\$10.00

Shared Card Users

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

Customer Support Tab

Customer Details Tab - Cards Tab – Shared Card Users



The screenshot shows a 'Card Details' window with a close button in the top right corner. The window contains four expandable sections: 'Card Information', 'Card Alerts', 'Card Controls', and 'Shared Card Users'. The 'Shared Card Users' section is currently expanded, revealing a table with the following data:

Full Name	Access Level	My Location
Mickey Mouse	Full Access	Disabled

- The Card Controls pane shows if other users are subscribed to the same card. In this case another user, Mickey Mouse, has also registered this card.

Customer Support Tab

Customer Details Tab – Transactions Tab

A. Click

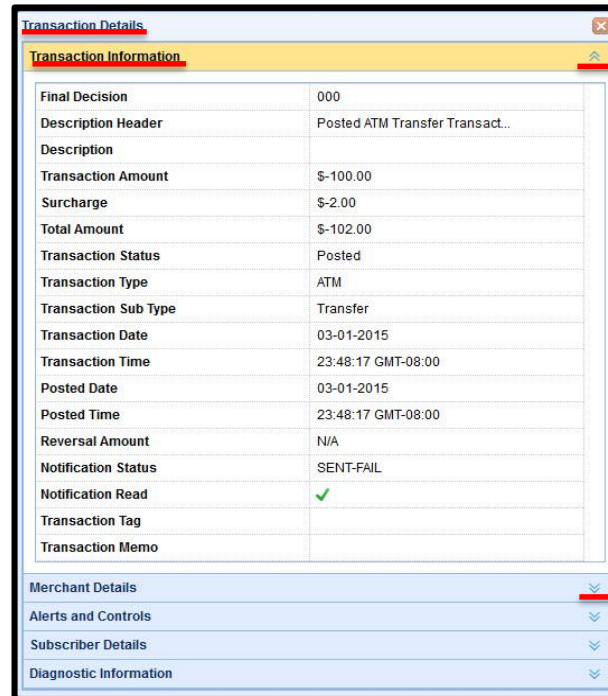
Accounts		Cards	Transactions	Account/Card Alerts					
					Transaction From Date:		<input type="text"/>	To Date:	<input type="text"/>
	Transaction Status	Merchant Name	Total Amount	Transaction Date	Posted Date	Card Number	Alert Triggered		
= Denied - 4 Item(s)									
1	Denied	FIFTH FINANCIAL	\$-7,157.97	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 Page 1 of 1 Displaying 1									

B. Double click

- Clicking on the Transactions sub-tab in the bottom section of the Customer Details page will display a list of recent transactions made on the cards.
- Double-clicking on a transaction brings up the Transaction Details pop-up screen, which shows detailed information about the transaction.
- Each group is represented by an expandable/collapsible pane, so that it only shows the transactions with the specific transaction status.

Customer Support Tab

Customer Details Tab – Transactions Tab – Transaction Information



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	

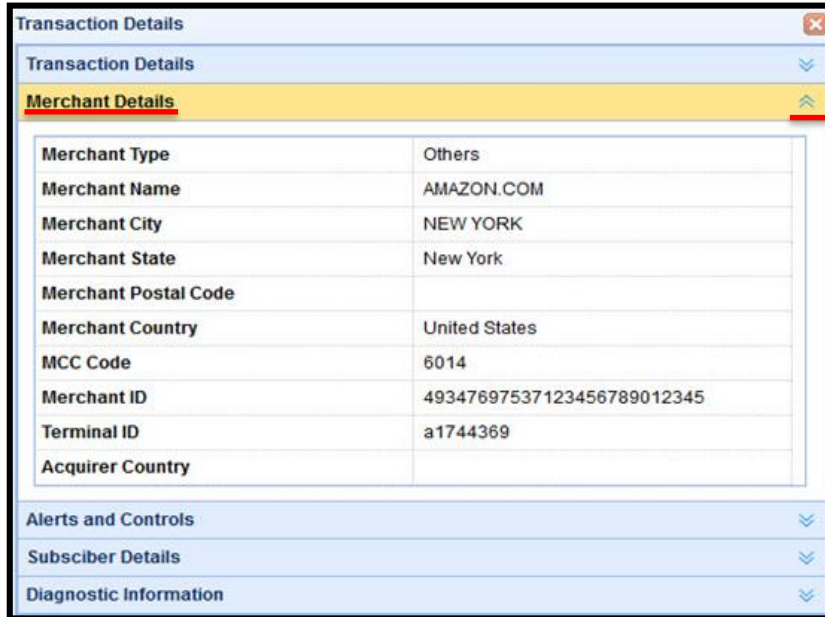
Click

Click

- Clicking on a transaction will cause the Transaction Details pop-up to display.
- The Transaction Details pop-up 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 closing others.

Customer Support Tab

Customer Details Tab – Transactions Tab – Merchant Details



The screenshot shows a software interface titled "Transaction Details" with a close button in the top right corner. Below the title bar, there are several expandable sections: "Transaction Details", "Merchant Details", "Alerts and Controls", "Subscriber Details", and "Diagnostic Information". The "Merchant Details" section is currently expanded, showing a table of merchant information. To the right of the "Merchant Details" section header, there is a red arrow pointing to it with the word "Click" in red text.

Merchant Details	
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	

Click

- Clicking on the Merchant Details arrow will display this pane and close 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

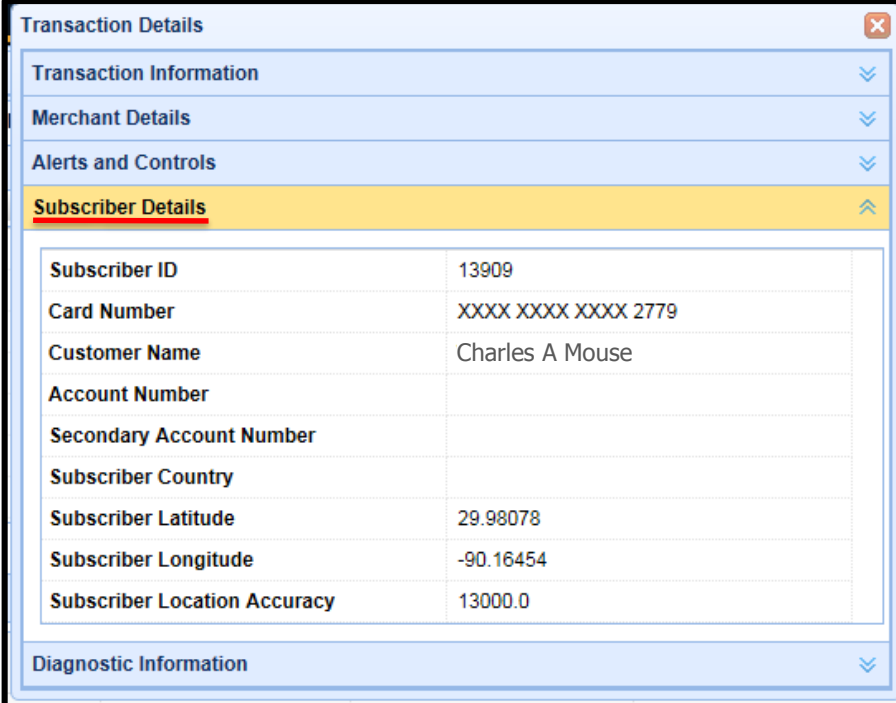
Customer Details Tab – Transactions Tab – Alerts and Controls

- **Controls Applied to Transaction** shows all the control policies set by the user to evaluate the transaction.
- **Control Recommendation** shows the recommendation for the transaction.
- **Recommendation Reason** shows all the control policies applied to the transaction. One of the below recommendations will show:
 - Not Invoked
 - Not Provisioned
 - Not Applicable
 - Rejected
 - Don't Know
 - Approved
- **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.

Alerts and Controls		
<u>Controls Applied to Transaction</u>	Status	
	Card On/Off	
	My Location	
	Transaction Types	
	Merchant Types	
	My Regions	
	Spend Limits	
	ofw card state	
	Monthly Threshold	
	Weekly Threshold	
	Warning Alert	
	<u>Control Recommendation</u>	Approved
Status		Not_Invoked
Card On/Off		Approved
My Location		Approved
Transaction Types		Not_Invoked
Merchant Types		Not_Invoked
My Regions		Not_Invoked
Spend Limits		Approved
Block International		Not_Applicable
ofw card state		Approved
Monthly Threshold		Not_Invoked
Weekly Threshold		Not_Invoked
<u>Recommendation Reason</u>	Warning Alert	Not_Invoked
	Transaction Alert Generated	
	Always alert	
	Valid	✓

Customer Support Tab

Customer Details Tab – Transactions Tab – Subscriber Details



The screenshot shows a software interface titled "Transaction Details" with a close button in the top right corner. On the left side, there is a vertical list of expandable sections: "Transaction Information", "Merchant Details", "Alerts and Controls", "Subscriber Details", and "Diagnostic Information". The "Subscriber Details" section is currently expanded, highlighted in yellow, and shows a table of subscriber information. The table has two columns: a label column and a value column. The values include a subscriber ID, a masked card number, a customer name, and various location-related fields with numerical data.

Subscriber Details	
Subscriber ID	13909
Card Number	XXXX XXXX XXXX 2779
Customer Name	Charles A Mouse
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 subscriber including their 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

Transaction Details	
Transaction Information	⌵
Merchant Details	⌵
Alerts and Controls	⌵
Subscriber Details	⌵
Diagnostic Information	⌴
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

- The information shown in this pane is used for advanced troubleshooting of issues.

Customer Support Tab

Customer Details Tab – Account/Card Alerts Tab

The screenshot illustrates the navigation path within the Customer Support interface. At the top, the 'Customer Support' tab is selected. Below it, the 'Customer Details' sub-tab is highlighted. An arrow points from this sub-tab to the 'Account/Card Alerts' sub-tab in the main interface. The 'Account/Card Alerts' sub-tab displays a table of alerts. The second row, which is highlighted in yellow, is labeled 'Card state generated alert'. A red line and the text 'Double click' indicate that clicking on this row opens a detailed view. This detailed view, titled 'Alert Details', shows the following information:

Alert Details	
Active	
Alert Type	Card state generated ale...
Account Number	
Card Number	XXXX XXXX XXXX 1682
Alert Description	Status of Card Number XX...
<u>Pending Delete Time</u>	Wed Sep-17-2014 14:26:14...
Record Create Time	Tue Sep-09-2014 14:26:14...
Last Update Time	Tue Sep-09-2014 14:28:00...

- 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 customer has received.
- Double-clicking on an alert brings up the Alert Details pop-up, 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

User Flow	Sub Flow Detail	Status Flag	Additional Information	Reason Code	Create Time
1 Authentication	Login	Success	Login name: demouser1		02-23-2015 13:38:36 GMT-08:00
2 Location Settings	Selected location control type	Success	Turn "My Region" policy on		02-22-2015 11:38:36 GMT-08:00
3 Authentication	Login	Success	Login name: demouser1		02-22-2015 11:30:40 GMT-08:00
4 Authentication	Login	Success	Login name: demouser1		02-22-2015 06:04:39 GMT-08:00
5 User Registration	User registration state	Success	User registration state "Create Your Login Account-6" with...		02-21-2015 15:24:21 GMT-08:00
6 User Registration	User registration state	Failure	User registration state "Create Your Login Account-6" with...		02-21-2015 15:23:53 GMT-08:00
7 User Registration	User registration state	Success	User registration state "Accept Privacy Policy-16" with pa...		02-21-2015 15:21:29 GMT-08:00
8 User Registration	User registration state	Success	User registration state "Accept Terms and Conditions-15" w...		02-21-2015 15:21:27 GMT-08:00
9 User Registration	User registration state	Success	User registration state "Enter Your Social Security Number...		02-21-2015 15:21:24 GMT-08:00
10 User Registration	User registration state	Success	User registration state "Enter Your Card Information-2" wi...		02-21-2015 15:21:15 GMT-08:00

- The Activity Viewer sub-tab displays actions the user has taken on the mobile application 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 record.
- This page provides information that is meant to be used by Customer Support Representatives as the first level troubleshooting tool.
- Activity is hard deleted every 90 days.

Customer Support Tab

Activity Viewer Tab

Dashboard Customer Support Reports Administration FI Onboarding FI Config View

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 Administration FI Onboarding

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

- A user can also access this page by clicking on the "Activity Viewer" link associated with a cardholder on the Customer Search page, or by clicking "Show Activity Viewer" on the Customer Details page.
- There is no exporting capability for Activity Viewer. The information is purged after 90 days.

Customer Support Tab

On Behalf Of Tab

The screenshot displays the 'On Behalf Of' sub-tab within the 'Customer Support' section of the mConsole. The interface is organized into several sections:

- Navigation Bar:** Includes tabs for Dashboard, Customer Support (active), Reports, Administration, FI Onboarding, and FI Config View. Below this, there are sub-tabs for Customer Troubleshooting, Reset Registration State, and On Behalf Of (active).
- On Behalf Of Header:** A light blue bar with the text 'On Behalf Of' and a refresh icon.
- Login Account Information:** Shows the 'Login Name' as 'demouser1'. To the right are three buttons: 'Disable Account', 'Enable Account', and 'Unsubscribe'.
- Customer Information:** Displays the 'Contact Email Address' as 'dave@ondotssystems.com'. To the right are 'Update' and 'Cancel' buttons.
- Card Operations:** Features a 'Select Card' dropdown menu currently showing 'XXXX XXXX XXXX 0005'. To the right are four buttons: 'Card On', 'Card Off', 'All Alerts', and 'No Controls'.
- Diagnostics:** Contains a single button labeled 'Test Push Notification'.

- 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.
- The On Behalf Of functionality allows an mConsole user to take action on behalf of the cardholder.
- A cardholder will receive a notification when a mConsole user takes action on their behalf.

Customer Support Tab

On Behalf Of Tab

Options

The screenshot displays the 'On Behalf Of' interface within the mConsole. The top navigation bar includes tabs for Dashboard, Customer Support (highlighted), Reports, Administration, FI Onboarding, and FI Config View. Below this, a sub-navigation bar shows Customer Troubleshooting, Reset Registration State, and On Behalf Of (highlighted). The main content area is titled 'On Behalf Of' and contains several sections:

- Login Account Information:** Displays the Login Name 'trinh3' and buttons for 'Disable Account', 'Enable Account', and 'Unsubscribe'.
- Customer Information:** Displays the Contact Email Address 'trinh@ondotsystems.com' and buttons for 'Update' and 'Cancel'.
- Card Operations:** Features a 'Select Card' dropdown menu and buttons for 'Card On', 'Card Off', 'All Alerts', and 'No Controls'.
- Diagnostics:** Includes a 'Test Push Notification' button.

The actions that an mConsole user can take on behalf of the cardholder are:

- Enable and disable an existing registered user's account. A user in a "Disabled" status will not be able to login to the mobile app.
- Update a user's email address that was created in the system. This email address is used by the app to send a forgotten password token to the cardholder.
- Turn "Card On" or "Card Off" for the user. When a card is turned off, all transactions made on the card will be declined.
- Enable all of the alerts ("All Alerts") associated with the card, all transactions will be approved based on the app settings.
- Selecting "No Controls" disables all controls the cardholder had previously set.
- Send a test push notification to the user's phone.

Customer Support Tab

On Behalf Of Tab

The screenshot shows the 'On Behalf Of' tab in the 'Customer Support' section. The interface includes a navigation bar with tabs: Dashboard, Customer Support, Reports, Administration, FI Onboarding, and FI Config View. Below this, there are sub-tabs: Customer Troubleshooting, Reset Registration State, and On Behalf Of (selected). The 'On Behalf Of' section has a title bar with a refresh icon. It contains three main sections: 'Login Account Information' with a 'Login Name' field showing 'trinh3' and buttons for 'Disable Account', 'Enable Account', and 'Unsubscribe' (highlighted with a red underline); 'Customer Information' with a 'Contact Email Address' field showing 'trinh@ondotsystems.com' and buttons for 'Update' and 'Cancel'; and 'Card Operations' which is currently empty.

- Unsubscribe the user from using the mobile app: the unsubscribed user will not be able to login to the app again; the card/user is not deleted from mConsole.
- If the user changes his/her mind and wants to use the app again later, the user will have to re-register.
- A FI must unsubscribe a cardholder from SecurLOCK™ Equip when closing the cardholder entry in the card processing system. There is no link between the two systems.
- **No cardholder should ever be unsubscribed unless it is recommended by FIS, or if the purpose is to remove the cardholder because s/he no longer want to use the SecurLOCK Equip application.**

Customer Support Tab

Reset Registration State Tab

Dashboard Customer Support Reports Administration FI Onboarding FI Config View

Customer Troubleshooting **Reset Registration State** Customer Details x

During the customer registration process or while adding additional cards for management through the mobile application - the card may get locked from registration process. To unlock the card from registration process, enter the customer's complete PAN number below. Once the card is unlocked from registration process, the customer can resume the registration or add card process.

Enter card number: ← **A. Enter**

B. Click →

- If a user enters incorrect authentication information three times consecutively, then the user will be locked out of the registration process for a period of 30 minutes.
- The financial institution can use the "Reset Registration State" tab to reset a card that has been locked out during registration.
- In order to do so, navigate to the "Customer Support" tab and then click on the "Reset Registration State" sub-tab.
- Enter card number and then click "Reset".

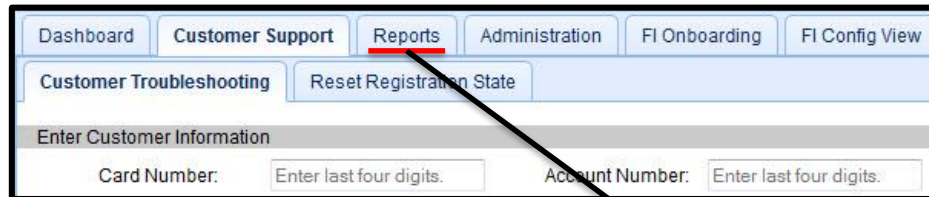
SecurLOCK™ Equip – mConsole Overview

Reports Tab

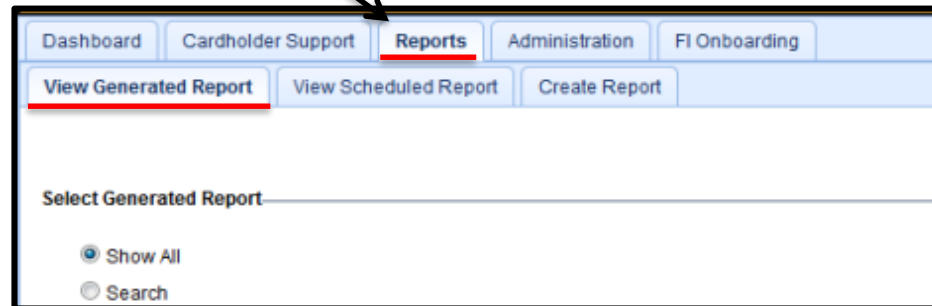
- View Generated Report tab
- View Scheduled Report tab
- Create Report tab

Reports Tab

View Generated Report Tab



This screenshot shows the top navigation bar of the application. The 'Reports' tab is highlighted with a red underline. Below the navigation bar, there are sections for 'Customer Troubleshooting' (with a 'Reset Registration State' button) and 'Enter Customer Information' (with input fields for 'Card Number' and 'Account Number', each with a placeholder 'Enter last four digits.').



This screenshot shows the 'View Generated Report' sub-tab, which is highlighted with a red underline. The navigation bar now includes 'Cardholder Support' and 'Reports' (highlighted). Below the navigation bar, there are buttons for 'View Generated Report', 'View Scheduled Report', and 'Create Report'. The main content area has a section titled 'Select Generated Report' followed by a text input field. Below this, there are two radio buttons: 'Show All' (which is selected) and 'Search'.

- When clicking on the Reports tab, the user is taken to the "View Generated Report" sub-tab. This screen shows the one-time reports that have been generated for the processor or FI.

Reports Tab

View Generated Report Tab

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

View Generated Report View Scheduled Report Create Report Custom Report

Select FI : ALL

Select Generated Report

☒ Show All
☐ Search

List of Generated Reports

Action	Report Name	Report Date	Fis	Report Type	Report Frequency	Report Period
1 Details Show Report	Subscribers for Carson Bank	05/08/2017	Carson Bank	Per-FI	One-time	Apr 2017
2 Details Show Report	SecurLOCK Equip - Last 3 Mon...	05/07/2017	Pioneer Bank	Per-FI	Recurring	Feb 2017 - Apr 2017
3 Details Show Report	new subscribers	05/07/2017	TriStar Bank	Per-FI	Recurring	Apr 2017
4 Details Show Report	Test Rpt 2 05052017	05/05/2017	Pinnacle Bank	Per-FI	One-time	Apr 2017
5 Details Show Report	Test 05052017	05/05/2017	Pinnacle Bank	Per-FI	One-time	Apr 2017
6 Details Show Report	USER LIST	05/05/2017	Winnsboro State Bank and Tru...	Per-FI	One-time	Apr 2017
7 Details Show Report	April Test	05/05/2017	Douglas National Bank	Per-FI	One-time	Apr 2017
8 Details Show Report	TEST REPORT	05/05/2017	Winnsboro State Bank and Tru...	Per-FI	One-time	Apr 2017
9 Details Show Report	Test Report JC	05/05/2017	Citizens National Bank - Texas	Per-FI	One-time	Apr 2017
10 Details Show Report	Test Repoer 05042017	05/05/2017	Pinnacle Bank	Per-FI	One-time	Apr 2017

10 Page 1 of 56 Displaying 1 to 10 of 556 items

The reports shown in this list include:

- One-time immediate reports.
- Scheduled reports for which the scheduled execution date has occurred.
- Recurring reports with at least the first possible execution date passed. Use this option for repeating reports.

Reports Tab

View Generated Report Tab

Dashboard | Cardholder Support | **Reports**

View Generated Report | View Scheduled Report

Select Generated Report _____

☒ Show All
☐ Search

List of Generated Reports

Action	Report Name
1	<u>last monthseparate report fi</u> Click
2	<u>last monthseparate report fi</u>

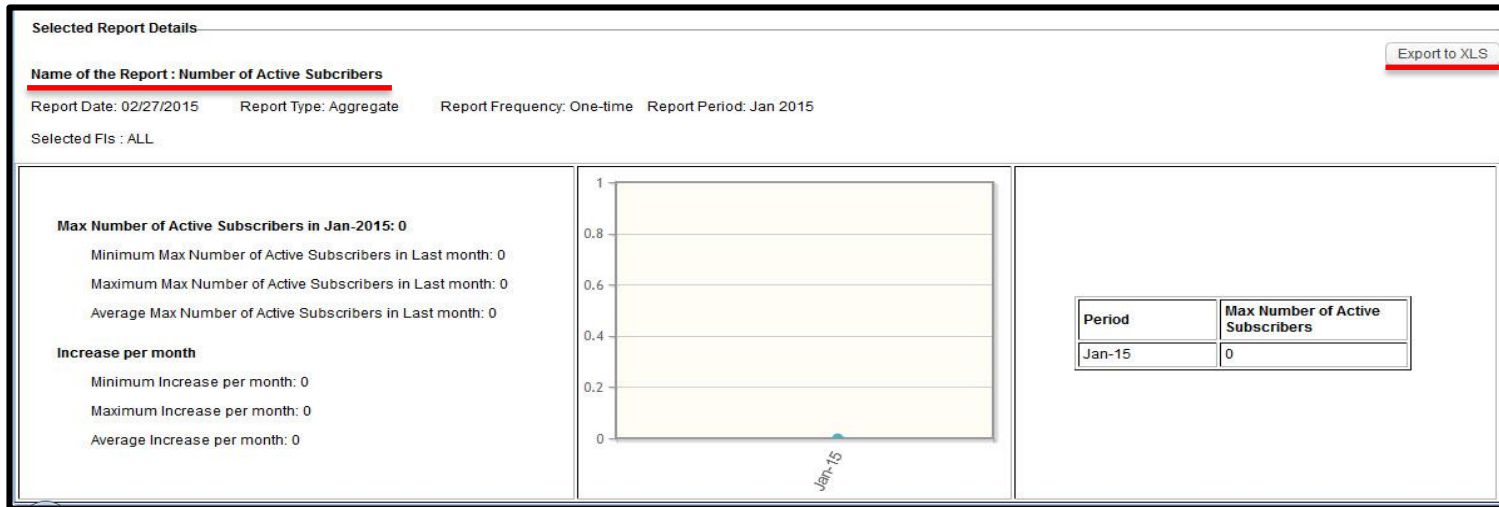
Report Details [X]

Report Name:	Subscribers ABC FI
Report Period:	Last month
Report Generated On :	5/8/2017
Report Format:	CSV
Destination Email Address:	roberta.payne@ABCFI.COM
Report Type:	Per-FI
FIs:	ABC FI
Selected Fields:	Number of New Subscribers Max Number of Active Subscribers

- When clicking on a Report Name, a screen is displayed which summarizes the information entered during the report creation process.
- The screen also expands to show the report data.

Reports Tab

View Generated Report Tab



Click

- The report will display at the bottom of the screen.
- The mConsole user also has the capability to export reports to Excel.

Reports Tab

View Scheduled Report Tab – View Details

Dashboard | Cardholder Support | **Reports** | Administration | FI Onboarding


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 Period
1 	recurring per fi	ALL	Per-FI	Recurring	Oct 2014 - Sep 2015

10 | Page 1 of 1 | Displaying 1 to 1 of 1 items

Selected Report Details

Active:		Selected Fields:	Number of Subscribers
Report Name:	recurring per fi		Number of New Subscribers
Report Period:	Last month		Max Number of Active Subscribers
Start Month:	Oct 2014		Number of Transaction Updates
End Month:	Sep 2015		Number of Alerts Invoked
Date of Report Generation in Month:	9th of the month		Number of Notifications
Report Format:	CSV		Number of Merchant Type Alerts Invoked
Destination Email Address:	bharani@ondotssystems.com		Number of Transaction Type Alerts Invoked
Report Type:	Per-FI		Number of Subscriber Location Alerts Invoked
FI:	ALL		Number of Threshold Alerts Invoked
Last Available Report:			Number of Auth Failed
Next Scheduled Run Date:	10/08/2014		Number of Auth Passed
			Number of Auth Dont Know
			Number of Auth Not Applicable
			Number of Auth Transaction Type
			Number of Auth Merchant Type
			Number of Auth Threshold
			Number of Auth Locations

- The "View Scheduled Report" tab shows all scheduled reports that have been created.
- On this screen, a user can see the report details, activate/deactivate specific reports, and delete reports that are no longer needed.

Reports Tab

Create Report Tab (One Time Report Data)

The screenshot shows the 'Create Report' tab in the mConsole interface. The top navigation bar includes 'Dashboard', 'Cardholder Support', 'Reports' (selected), 'Administration', and 'FI Onboarding'. Below this, there are tabs for 'View Generated Report', 'View Scheduled Report', and 'Create Report' (highlighted with a red underline). A 'Select FI' dropdown menu is set to 'ALL', with 'Create Report' and 'Clear' buttons next to it. The main form is divided into several sections: 'Enter Report Title and Description' with fields for 'Name of the Report' and 'Description of the Report'; 'Reporting Details' with a 'Month(s) of Data in Report' dropdown set to 'Last Month', radio buttons for 'One Time' (selected) and 'Recurring', and a 'Report Generated On' date field set to '9/9/2014'; 'Select Format and Delivery' with radio buttons for 'Aggregate all Financial Institutions' (selected), 'Show each Financial Institution separately', and 'Create a separate report per Financial Institution'; and a 'Delivery Email Addresses' field with a placeholder 'Enter email addresses here. Separate email addresses by **'. On the right side, there is a 'Select Data Fields' section with a list of fields for generating a report, including 'Number of Subscribers', 'Number of New Subscribers', 'Max Number of Active Subscribers', 'Number of Transaction Updates', 'Number of Alerts Invoked', 'Number of Notifications', 'Number of Merchant Type Alerts Invoked', 'Number of Transaction Type Alerts Invoked', 'Number of Subscriber Location Alerts Invoked', 'Number of Threshold Alerts Invoked', and 'Number of Auth Failed'. Navigation buttons '>', '<', '<<', and '>>' are provided for the list.

- The "Create Report" tab provides mConsole users the ability to create a single or recurring report.
- The user can specify:
 - The name and time-frame of the report.
 - The data fields to be included in the report.
 - When the report is to be run.
 - The email address(es) that the report is to be sent to.

Reports Tab

Create Report Tab (One Time Report Data)

Click

Dashboard Cardholder Support Reports Administration FI Onboarding

View Generated Report View Scheduled Report Create Report

Select FI: ALL

Create Report 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

Month(s) of Data in Report: Last Month

One Time Recurring

Report Generated On: 9/9/2014

Select Format and Delivery

Aggregate all Financial Institutions Show each Financial Institution separately Create a separate report per Financial Institution

Delivery Email Addresses: Enter email addresses here. Separate email addresses by **

Select Data Fields

Select the fields for generating report

Number of Subscribers
Number of New Subscribers
Max Number of Active Subscribers
Number of Transaction Updates
Number of Alerts Invoked
Number of Notifications
Number of Merchant Type Alerts Invoked
Number of Transaction Type Alerts Invoked
Number of Subscriber Location Alerts Invoked
Number of Threshold Alerts Invoked
Number of Auth Failed

- After selecting the parameters and clicking “Create Report”, a report will be generated as a “.csv” file and sent to the email address(es) you specify.
- There is no export data functionality.
- Once a recurring report is created, it cannot be generated or viewed from the View Scheduled Reports tab
- Reports remain on the system until they are deleted.

SecurLOCK™ Equip – mConsole Overview

Financial Institution Config View

Dashboard Customer Support Reports **FI Config View**

Select FI : Certified First National

FI Details

Name	Value
1 Active	Yes
2 FI Token	ICICI
3 Alias 1	
4 Alias 2	
5 FI Name	Certified First National
6 Mobile Apps	onidot
7 Contact Email Address	support@certified.com
8 Billing Email Address	support@certified.com

Branding Info

Name	Value
1 FI Logo	View Image
2 Card FI Logo	View Image
3 Card Image Front - default	View Image
4 Terms And Conditions	View Html
5 Privacy Policy	View Html

Issuer System Details

Issuer System ID	FI Token	Issuer System Name	Issuer System Token	Alias1(Logo)	Alias2(Client ID)	Description	Platform	Supported BIN
1 2	ICICI	MANI_2	MANI	Logo	10000000	DEFAULT_IS_DESC	ONDOT_CONNECT	1111

BIN Details

BIN ID	Issuer System Token	BIN Number	BIN Length	Currency Code	Card Type	Default Card State	Unique Card Numbers	Default Primary	Maximum ATM Limit	Maximum POS Limit
1 2	MANI	1111	4	US Dollars Numeric	Debit - debit	Active - 1	unique	primary	\$1,000.00	\$1,000.00

- The FI Config View screen allows a financial institution's mConsole FI Admin users to view the configuration parameters that have been set up through the FI Onboarding tab.
- Only FI Admins can view information on this screen.

SecurLOCK™ Equip – mConsole Overview Review

- Access mConsole.
- Dashboard tab.
- Customer Support tab.
- Reports tab.
- Financial Institution Config View tab.

Empowering
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