



# MobiBranch Feature Sheet

## Empower your employees

### INTEGRATED VIRTUAL BRANCH

Give your employees the tools they need to support clients outside of the branch. Remove location constraints and transform the traditional to digital.

You'll create a better banking experience for your clients and make your workforce mobile.



## Streamline Processes

Create efficient workflows and streamline processes for increased accuracy and productivity.

MobiBranch is an all-in-one financial services application that can digitally transform your branch and enhance banking processes.

## Take the Branch to Go

Enjoy the convenience of setting up your mobile branch anywhere and delivering quality service directly to your clients. Create a positive, memorable experience for your clients by providing world class in-person assistance with their institution needs. Your clients will remember your bank as the one that is always there for them—whenever they need it and wherever they are.

## Keep Your Data Secure

Security is always at the forefront. MobiBranch is constantly updated with the latest security protocols to ensure your clients feel safe and at ease with out of the branch banking. Messages are encrypted end-to-end and information is never cached on the device. Confidential data is stored at the institution's private server.

## Bank Smarter

MobiBranch revolutionizes the traditional way of banking and opens new doors to opportunities and business growth. Some key benefits of MobiBranch include:

- Increase brand awareness
- Make your employees as mobile as your clients are
- Lighten the paper load and go digital
- Multiple device access for flexibility
- Promote teamwork and collaboration

# Extended Features

## Services

- Account Applications
- Service forms
- Digital version control
- Paperless tracking
- Supervisory controls
- Route applications to other staff
- Approve/reject applications

## Helpdesk

- Manage client help desk queries
- Share files securely
- Manage helpdesk topics
- Control helpdesk access
- Set helpdesk hours Route client chat to other online personnel
- Chat transcripts

## Teller Dashboard

- Internal transfers
- Account profile
- Account history
- Customer alerts
- Cheque deposits
- Cash deposits
- Bill payments
- P2P payments
- Scheduled payments
- Topups for clients
- Topups for walk-ins
- Receipt storage
- Digital signatures
- Multi-signature transactions
- Pending transactions
- Contactless transactions

## TopUp

- Cash topups

## Queue

- Manage lineups virtually
- Queue visit details
- Assign clients
- View other branch queues
- Set queue visitor topics
- Push notifications for customers
- Real time queue tracking for customers to view their spot in line

## Connect

- Private, secure, encrypted
- Chat one on one
- Chat in groups
- Create groups/departments for meetings, postings, news, etc.
- Share files
- Secure mode for sensitive information that deletes automatically
- Concierge mode to search for employees with specific skills
- Front desk tool to find specific employees

## Prospects

- Sign up prospective clients
- Reminders and ticklers
- Prospect profile
- Route prospects
- Prospect updates
- Prospect activity tracking
- Export prospect files

## Administration

- Employee Maintenance
- Employee permissions/user roles
- Password settings
- Activity Log
- Employee Timesheets
- Employee Expenses

## Locations

- GPS location
- Branch locations
- Staff geolocation
- Activity checks
- Location disabler
- Directions through Google Maps

## Productivity

- Loan calculator
- Savings calculator
- Mortgage calculator
- Simple calculator
- Helpful links
- Create and submit expenses
- Create and submit timesheets
- Personal notes

## Security

- End-to-end encryption
- No caching on the device
- Account masking
- Session timeouts
- All information stored on in-house servers for future data mining by the institution
- All activity by employees tracked in activity log



Contact us today for more information.

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