

# DOVELINK BUSINESS

SERVING CREDIT UNIONS SINCE 2000

**WE MAKE OUTSOURCING EASY!**

## Solutions and Services Overview

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*“Where Commitment Empowers Vision”*

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# What's New or Enhanced for 2025



## Project Concierge Service (PCS)

**Project Concierge Service (PCS)** is one way where we show our partners that we are willing to go the extra mile, going above and beyond their expectations. Considering that DoveLink Business has been around for more than 25 years, our team has learned what are the hurdles that face most of our clients in getting projects submitted and completed.

PCS is available to any partner to help get beyond the hurdles and ultimately minimize their workload. The best part of PCS is that there are no costs to the client, all that is included is completely complimentary. You will want to look over the section for Project Concierge Service to see how your credit union can benefit.

## Sliding Scale Support Hours (SSSH)



**Sliding Scale Support Hours (SSSH)** has become our most innovative, flexible hour-based outsourcing option. Prior to SSSH being introduced in the 4th quarter of 2024 DoveLink Business had always used what was called **Principle Systematic Support**. As our partners evolved into a new focus for their members DoveLink Business chose to offer SSSH to take the hassle out of being concerned about how many hours are available and concerned about increasing costs over time. Sliding Scale provides flexibility and locks in pricing over the long term.

SSSH is perfect for clients where the needs change often depending on how many hours are required to meet the demands of the credit union. SSSH offers the best pricing, flexibility for the client and locking in costs over the long term. For details, please review the Sliding Scale Support Hours section of this booklet.



## Walk Before You Run

**Walk Before You Run (WBYR)** has been a major factor in growth for DoveLink Business through the years. Why not trying us out before making a major contractual commitment. WBYR provides the credit union with a few hours giving their team an opportunity to see if our team is a good fit or not. Fortunately, over the years WBYR has always prevailed in the start of long-term relationships with most of our credit union partners.


With the EOL of Principle Systematic Support at the end of 2024, WBYR changed to adapt to Sliding Scale more effectively. Check the details about WBYR and see if it is a viable option for your credit union partnering with DoveLink Business.



## Project Bundles


**Project Bundles (SSSH)** have always been available for our clients. The difference is in 2025 we have developed policies to ensure that when needed a credit union can see the benefit of Project Bundles over longer term outsourcing options.

Project Bundles provide competitive pricing for clients that want to solely focus on a key project and not a plethora of projects. Project Bundles allow the credit union to focus on a single project and engage with the DoveLink Business team to see it successfully completed.

<p><b>Sliding Monthly Subscriptions</b></p>	
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Back in 2015 DoveLink Business launched a new subscription outsourcing option called **Cornerstone CU Resources (CCUR)**. Now that time has passed, we have learned that for some a subscription makes sense; but the credit union may not require the features and benefits from **CCUR**. Therefore, officially launching in 2025 is our latest subscription option called **Sliding Scale Subscriptions**.

A Sliding Monthly Subscription is ideal for clients that need constant support; but does not require a significant number of hours each month. For example, clients that do not regularly require more than 25-30 hours a month. Check out the section on Sliding Monthly Subscriptions and see if it is the right fit for your credit union.

	<p><b>Updated Cornerstone CU Resources (CCUR)</b></p>
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**DoveLink Business** continues to offer the best subscription-based options for our clients. Cornerstone CU Resources (CCUR) remains the premier option for clients that need consistent support with a high demand for hourly support. As with all our outsourcing options, CCUR continues to evolve as the needs of our clients change.

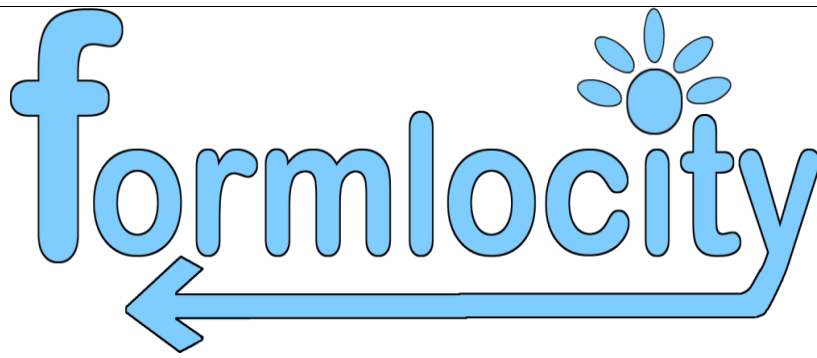
CCUR is typically less than the cost for a single IT employee for the credit union, however, the credit union has access to a full team of professionals, including developers, analysts and support specialists. No concerns about PTO, training, etc. CCUR ensures that the credit union has the support that is required.

CCUR makes sense for clients that require more than 40 hours a month for consistent support in software development, IT support, back office, needs and a variety of other services and software solutions.

**NEW in 2025** Starting in 2025 partners can select an enhanced version of **CCUR** called **Cornerstone CU Resources with Lead**. To put it simply the credit will have a dedicated DoveLink Business team member that reports directly to the credit union for a set number of hours each week.

Cornerstone CU Resources equals “peace of mind”





## Document/Form Management Solution

Since launching Genesis back in 2018 this middleware platform has been instrumental in rapidly developing sophisticated solutions and integration of numerous third-party vendors. Paired with Genesis, our middleware development platform Formlocity provides the most formidable document/form solution available 2024 Genesis has new security features making it the most secure and robust development platform available.

Here are some of the features in Formlocity that you cannot get in a single system elsewhere:

- Generate large batches of custom notices and letters
  - Supports being directly emailed to the member
  - Protected by password encryption for confidentiality
- Fast and Easy marketing support
  - Allow your marketing team to use their own creativity
  - Allows your team to target specific members groups
  - Reduces costs by allowing material to be distributed automatically.
- Provides a faster simpler approach to on-demand forms
  - Can adapt to any custom on-demand PowerOn
    - Includes EMA, ELA and EAR
  - Requires no new skills for your team
  - Convert traditional Symform and Symform PDF in a fraction of the time
  - Does not have the inherent issues that are being found in PowerFrame
- Supports the distribution of Member Statements

- Offers an online portal for members to access their forms and documents
- **Coming in 2025**, repository for documentation, procedures, policies, etc.
- Benefit from all the features or choose only the ones you want
- Small upfront costs with options to determine the best pricing model for your credit union.

# DoveLink Business Overview

**DoveLink Business** began serving toward the end of 2000, officially launched as **DoveLink Business** in 2001. Initially, **DoveLink Business** provided interim “in-house” contracting for credit unions that were using Episys as their core. This evolved into more requests from other Symitar clients, requiring additional resources. After 18 months working as a single consultant, **DoveLink Business** made the switch in providing support for other credit unions. Around that same time a group of credit unions began with a user group that ultimately became SymEast. As you know, SymEast has grown into one of the largest user groups for credit unions using Episys. The first initial growth for **DoveLink Business** came by participating in one of the first SymEast meetings held on the river front of the St. John’s River in Jacksonville, Florida. **DoveLink Business** now serves more than 80 active clients, having served more than 100 credit union clients in the last 25 years.

Enough about our history, we want to introduce you to the **DoveLink Business** of today. This booklet provides you with an overview of our most popular outsourcing options, Symitar services and custom solutions.

## We Make Outsourcing Easy

**DoveLink Business** offers simple flexible outsourcing options assisting your credit union with an experienced team. The **DoveLink Business** team is ready and able to begin assisting with your ongoing list of projects. Credit Unions that have never worked with us can participate in our unique **Walk Before You Run (WBYS)** program. From WBYS clients can slide directly into our flexible **Sliding Scale Support Hour (SSSH) Bundles**. More about this in the sections highlighting WBYS and SSSH. After 24 years of providing support using our traditional **Principle Systematic Support (PSS)**, DoveLink Business decided that SSSH was far more flexible and feature rich for our clients. Therefore, PSS End of Life became effective on February 28, 2025. Of course, our options are even more flexible for clients that utilize our flat monthly subscription with **Cornerstone CU Resources (CCUR)** or starting in 2025 our newest **Sliding Scale Subscriptions (SSS)**.

## We Provide a Variety of Services with a Symitar Focus

**DoveLink Business** goes beyond developing software solutions, assisting our partners with a variety of tasks that they encounter over time. First, we can assist you with **mergers**. We have completed numerous mergers over the last few years. Most being another credit union merging into Episys from another core. However, we also have experience in merging small banks into the credit union arena. For new partners the concept of a “**2 to 4 Digit Conversion**” is nonexistent; but for credit unions that have been using Episys for a long while, this is a very tedious project that requires a significant number of man hours to complete. DoveLink Business can help you with this too. Another popular service that we do often is **onsite Process Assessments**. Like the JHA SymAdvisor™ process, DoveLink Business sends a team to meet with a credit union, interviewing staff members from various departments with the goals of making daily processes easier, more efficient, faster, and certainly more cost effective. These are only three of the many services that DoveLink Business provides. Other services include **core conversions, core upgrades, form standardization, database verification, training** and of course, **software solutions**. More to come further along in this booklet, so keep on reading.

## We Build Flexible Solutions

**DoveLink Business** provides custom solutions using PowerOn®, Symform®, Symform PDF®, NetTeller® support, SymXChange®, Symconnect®, ARCU®, .NET, JAVA, Python and more.

Whether a simple report, a custom letter, or a complex software development project our team is experienced to exceed your expectations. We are not locked into building solutions based solely on PowerOn or other technologies rooted within the Episys core. We work very hard to think beyond the core.

One such way of going beyond is **Genesis**, our middleware development platform. **Genesis** is where integration is reimaged. **Genesis** is at the origin of progress; it

assists you and your members in experiencing a new reality of robust software solutions. **Genesis** is the foundation for an infinite number of possibilities.

Here is a short list of some of the unique solutions built on the power of **Genesis**:

- **Genesis FPS (OFAC Force)** – supporting batch and on-demand OFAC Screening.
- **Genesis Ignite** – provides the integration of FIS® ChexSystems® within EMA® and EAR® or other custom applications.
- **Genesis Ignite Plus** – gives you the ability to integrate FIS® BizChex®. DoveLink Business is one of very few companies certified to offer this service for our partners.
- **Genesis Login Assist** - online self-service for managing passwords for online and audio access.
- **Genesis JHA Wire Integration** – streamline OFAC screening within the JHA Wire module utilizing the foundation of Genesis.
- **Formlocity** - A solution that brings a creative versatility to stand-alone forms, custom batch letters, notices and marketing campaigns that leave all others behind. Planned for 2022 the implementation of member statements being delivered via encrypted email and options to host statements online.
- **All Aboard**- A unique solution that brings the power of AI making onboarding new members easier and far more effective than ever before. All Aboard utilizes a proprietary AI voice assistant streamlining the process to onboard consumers and business customers.
- **Executive Dashboards** – a PowerOn based solution that allows you to generate important dashboards for C-Level Executives without the hassle of working with a huge day behind data warehouse.

To learn more about our solutions, including those based on PowerOn, keep exploring this booklet, or give us a call. We look forward to hearing from you soon!

# DoveLink Business Outsourcing

Let us skip the small talk and jump into the flexible outsourcing options that DoveLink Business provides.

## Walk Before You Run

At DoveLink Business we understand that it is important to build trust with vendors. This takes time and often comes at a significant cost. Unfortunately, this relationship does not always turn out the way you planned. We understand the risk involved with a new vendor relationship, so we created a way for you to get to know us better with our unique **“Walk Before You Run” (WBYR)** program.

**Here is how it works!** You receive **25** hours for a discounted price off our normal rates. The hours are available for immediate use. The hours can be used for pretty much any IT-related project. Every project is treated with the same level of professionalism and support. Full access to our online ticket portal. Project management with regular status meetings. Use our Project Concierge services. You get the best possible rate and can benefit from our professionals immediately. All covered by a Master Service Agreement.



**Simplify Outsourcing with  
One Simple Step**

## Sliding Scale Support Hours (SSSH)

**Sliding Scale Support Hours (SSSH)** goes beyond traditional bundled hour products. SSSH provides flexibility and gives you control over costs for the long term. DoveLink Business took features from our original Principle Systematic Support bundles and Cornerstone CU Resources to offer our clients bundles of hours that work!

**SSSH** gives the credit union the opportunity to choose from 5 different Tiers and 10 different Commitment levels. Please reference the following chart:

Tier	Commitment Levels	Hours	Hours per Invoice	Threshold
1	1	50	50	15
	2	100	50	15
2	3	200	100	25
	4	300	100	25
3	5	400	150	50
	6	500	150	50
4	7	600	200	75
	8	700	200	75
5	9	800	250	100
	10	1000	250	100

**Tiers** are defined to establish the **number of hours** that are invoiced at a time and a **threshold** that determines when the next invoice is automatically submitted.

**Commitment Levels** set the total number of hours that the credit union desires to purchase over time. For example: Assume that you select Tier 3 / Commitment Level 5, the credit union is committing to a total of 400 hours. The first invoice when the Statement of Work is signed is for 150 of the 400 hours. Once the SSSH bundle is at or below the threshold of 50 hours, the next invoice for 150 hours is submitted. This continues until all the hours are invoiced.

On the last block of hours purchased when the credit union has used the hours where the balance is at or below the threshold, they can choose to slide up the scale to a larger commitment and better hourly rate, slide down the scale, or choose not to renew at all.



The following are some of the characteristics of SSSH:

- The **Tier** defines how many hours are invoiced each time and the threshold that determines when a new invoice is submitted
- **Commitment Levels** are associated directly with the number of hours that the credit union is purchasing. However, the credit union is only invoiced for the number of hours defined by the **Tier**.
- All hours under **Sliding Scale Support Hours** option hours **never expire**.
- The Credit Union purchases bundles as needed based on the tier and commitment level. When a bundle has hours that are equal to or less than the threshold defined by the Tier an invoice is automatically submitted for payment. However, if the bundle is at this point having purchased all the hours committed to by the credit union no invoice is submitted.
- If the Credit union is at a commitment level where the number of hours invoiced specified by the tier is not evenly divisible, the credit union will only be invoiced for the remaining hours needed to satisfy the commitment. However, if the credit union renews, then the total hours specified by the tier will apply.
- The Credit Union can slide up the scale to a higher commitment at a better rate any time while a SSSH bundle is active
- Once a commitment has been satisfied the credit union can slide up or down the scale, remain at the same commitment or not renew the bundle
- **There are no restrictions on when and how hours are used**
- **If the credit union renews the SSSH bundle without allowing it to expire, the rate chart in this Statement of Work never increases.**





## Cornerstone CU Resources

Like **SSSH**, **Cornerstone CU Resources (CCUR)** provides you with flexible options. You choose which features meet the needs of your credit union. Continue being member-centric by involving our professional services with **CCUR**.

For less than the cost of a single IT employee your credit union gains an experienced professional team for a flat monthly subscription used for outsourcing projects to DoveLink Business with **CCUR**.

Salary Statistics <i>(based salary.com)</i>		
	Base Average Salary	
Job Type	National	Credit Union Industry
Software Developer	\$169,800.00	\$166,800.00
IT Business Analyst	\$140,500.00	\$148,500.00
IT Project Manager	\$118,900.00	\$118,900.00

On average, a credit union will save more than \$75,000 a year in costs by subscribing to **CCUR**. Along with the significant savings the credit union gains access to a professional team of developers, analysts and support specialists, and again for less than the monthly cost for a single IT employee including their benefits package.

**CCUR** puts everything under one umbrella including **Programming Services**, **Business Services**, **Support Services**, and “cutting edge” software solutions.

The **Programming Services** part of the subscription includes PowerOn development, Symform support, PowerFrame conversions, ARCU support, SymXChange assistance, Banno interfaces to name a few of JHA/Symitar technologies. Beyond this, a subscription includes custom software development using .NET C#, JAVA, Python, etc.

Within **Business Services**, a subscription includes annual process assessments, merger assistance, platform conversion support, third party integrations, custom training, and back-office support among many others.

The subscription includes **Support Services** including estimates, online project ticketing reports, hosting solutions, a dedicated liaison and **Project Concierge** services. Each support service is designed to make your job easier, allowing you to focus on your members.

By subscribing to **CCUR**, the credit union receives immediate discounts on some of DoveLink Business more popular solutions including **Genesis, Ignite, Ignite Plus,** and **Formlocity**.

Most importantly, **CCUR** provides the credit union with up to **800** hours every **12 months** to do whatever is needed. **CCUR** is ideal for institutions that are looking for consistent support that exceeds 40 hours a month. Like **SSSH** once a credit union locks into their monthly subscription, the rate will never increase with an active subscription. This helps you manage long-term costs.

To see all the features and restrictions please refer to the Subscription Comparison chart found in the appendices of this booklet.

**CCUR** offers several different variations that may apply to a credit union wanting to subscribe. The following is a brief discussion of each of the alternatives:



**First Term Premium CCUR** We are confident that **CCUR** is the absolute best outsourcing option available. There we offer **First Term Premium CCUR** provides your credit union with all the benefits of **Premium CCUR** at a discounted rate off the normal subscription. The credit union must be a first-time subscriber for **CCUR**.

**How First Term Works!** A credit union subscribes to **CCUR** using an initial 12-month term. Each month during the first term the subscription is discounted significantly. At the end of the term, if the credit union does not agree that **CCUR** is invaluable, they simply cancel the subscription without any penalties. However, we are confident that your credit union will agree that even at the standard subscription price it is well worth the investment. Some restrictions do apply for **First Term**.

### **Premium CCUR Step-Up**

Taking **CCUR** a step further, DoveLink Business understands that every institution has an extraordinary workload focusing on its members. While DoveLink Business works hard using our **Project Coordinator Liaison Team (PCLT)** and **Project Concierge** services to assist in every way possible, it comes down to a simple matter of “more time is needed for evaluation.” In these cases, DoveLink Business now overs a **Step-Up of First Term CCUR**, giving the credit union another 12 months to truly build on the advantages of a **CCUR** subscription. Upon selecting Step-Up if the credit union wants to continue with CCUR they must accept the regular subscription.

### **Premium CCUR with Lead**

**Now starting in 2025**, DoveLink Business is providing an even more advanced option strengthening your ability to manage your projects with **Premium CCUR with Lead**. This CCUR option assigns a lead person that reports directly to the credit union for a specific number of hours each week. The lead then can choose

to delegate projects from the credit union to other DoveLink Business team members to ensure the most efficient turnaround time on all projects.

The bottom line with **Cornerstone CU Resources** is that DoveLink Business wants our clients to have “peace of mind” that their needs are met in the most effective way.

GO FROM THIS  
CHAOS  
➔



TO SATISFACTION  
and  
CONTENTMENT  
➔





For some partners they simply do not require all that **Cornerstone CU Resources** offers. Therefore, starting in 2025, DoveLink Business offers a new unique subscription called **Sliding Monthly Subscriptions**. Now a credit union can have consistent support while managing the costs and not bust their budgets.

With **Sliding Monthly Subscriptions** a credit union establishes a base subscription rate that covers up to the first 25 hours of support. If you take an average, you will still see that the hourly rates are still far superior over bundled hour options. There is not a set number of hours that credit union has for a 12-month term. In contrast, the credit union uses hours as they need them. That is, if their needs increase exceeding the base subscription for 25 hours, the monthly subscription slides up. Of course, it goes the opposite way too, meaning that if the credit union returns to needing 25 hours or less the monthly subscription slides down automatically.

The base subscription is based on the asset size of the credit union. Therefore, it varies from one FI to another. Beyond the base subscription the monthly cost can slide up or down. The following chart shows the categories of hours that can change the cost for the monthly subscription:

Hours
1 - 25 HOURS
26 - 50 HOURS
51 - 75 HOURS
76 - 100 HOURS
101 - 125 HOURS
126 - 150 HOURS
150 - 175 HOURS
> 176 HOURS

The first category of hours (1-25) is included in the base subscription. Beyond 25 hours the next monthly subscription will reflect the cost of the excess hours

included with the base. For example, assume that the credit union has a based subscription of \$2500 per month and will need use 55 hours. The next month after the hours are used the subscription rate will go up to \$5,150.00. This rate includes the 25 hours from the base subscription, 25 hours in the next category and 5 hours from the 3<sup>rd</sup> category. While this one month is significantly higher than the base subscription the average hourly rate is only \$93.64. In short, as your need increases the average hourly rate decreases still making it a good choice over traditional set hours with bundle options.

Sliding Monthly Subscription is a viable choice for credit unions needing consistent support typically for 25 hours or less with the occasional upswing in projects requiring more hours.

## Dedicated Project Contract Support



**Dedicated Project Contract Support (DPCS)** provides your team with a dedicated developer / business analyst for a set number of hours and days for the duration of your project (***DPCS is outside the scope of CCUR and is not included as a feature of CCUR***). Over the last year many of our partners have needed temporary staff augmentation where they could depend on having a dedicated resource. DoveLink Business will enter into an agreement with the credit union to provide this type of support.

**DPCS** is typically a remote contract position, however, **DPCS** support is available onsite by request. Onsite is contingent to location, how often the contractor is needed, availability of resources and the length of the project. Any onsite work requires that the credit union will incur the responsibility of covering all travel-related expenses. In the latter case, where travel is required, a good faith estimate is provided in advance of the travel.





A typical DPCS contractor will dedicate a set number of hours every day for the duration of the project. For remote DPCS support the contractor will work for a maximum of 4 hours a day or a total of 20 hours a week. Any contractor participating in a project for where onsite work is required will be dedicated to the credit union's needs while onsite.

### **“Per Incident” Support**

Credit unions that require a small project estimated at 10 hours or less may choose the “Per Incident” option. Per incident rates are established on January 1<sup>st</sup> of each year (please contact sales for the current rate). The minimum number of hours for a per incident ticket is 2 hours. Beyond 10 hours one of the other bundle options become a more viable option even with smaller short-term needs.



# DoveLink Business Services

## Merger Support

Since the banking crisis of 2008 mergers have become a common way to establish market share and provide exceptional services for members. Over the last few years our team has assisted in numerous mergers combining two credit unions into a single entity. We have successfully completed small mergers with a few hundred members with a hand full of shares and much larger, more complex, mergers. The larger mergers included thousands of members, savings shares, share drafts, certificates of deposit, IRA shares, various member types, payroll and of course a variety of loans and cards. On average our team completes 3-5 mergers each calendar year.

We have a well-established project plan and a package of .NET programs and PowerOns that give us the strategic edge in making sure that the merger is completed on time and accurately.

## 2 to 4 Digit Conversions

Imagine being an institution that has been on Episys for a long time. Even though Episys easily supports 4-digit types many credit unions still find themselves shackled to the old 2-digit scheme. Moving from 2 to 4-digit types is doable; but requires a significant amount of coordination and manpower. DoveLink Business brings this skill to the table and can assist you in getting to the 4-digit scheme allowing your credit union to continue to grow without the unwanted issues that come with running out of share and loan types.



## Onsite Process Assessments

The DoveLink Business team has over 20 years of experience servicing credit unions of varying sizes and complexities. This has given our team the unique

perspective of being able to see how tasks are completed by these institutions. With our Process Assessment we send a team to your credit union to interview your team and to see firsthand how your staff do their tasks. Within a short period after the visit, we will provide an Executive Summary and detailed report providing for you what we believe to be “Best Business Practices.”

This includes options on how to move from where you are today to processes that yield more efficiency, allowing you to focus on what is most important, your members.

Our team comes to the credit union and interviews staff members from the Tellers on the front line to the C-Level Executives. Our approach is different from what many have experienced with a JHA SymAdvisor®. We provide a unique perspective by understanding how many of our partners are successfully completing daily tasks. The goal is to recommend “Best Business Practices” that can transform manual or inefficient tasks into streamlined processes. Interviewing all levels of staff members is important, allowing us to uncover even a small task that over time results in longer unnecessary hours.



## Database Verification Service

You are probably already aware that bad data can make its way into your database. Bad emails, addresses, missing phone numbers, and the like. However, did you realize that critical data like Social Security Numbers, correctly spelled names and birthdates are just a few data points that we have found to be incorrect or missing. In fact, we have found that as many as 12% of the accounts in your database could be subject to bad or missing data.

The adage "Garbage In is Garbage Out," holds true to this inaccurate, incomplete, or invalid data. Did you realize that this type of erroneous data could affect the credit score for your members? Think about it! A member has multiple accounts

where their name is entered incorrect at various FIs. All of this is reported to the credit bureaus resulting in aliases being identified for the consumer.

Our team comes in and analyzes your data the old fashion way by examining data records against documentation. There is no software that can correct these types of errors. Our team of analysts take the output from the analysis and manually examines documents within optical to determine what needs to be corrected. Ultimately your member benefits from these efforts to correct this critical data within your database.

DoveLink Business' **Database Verification Service** is a way to enhance the integrity of your database. We assist you in determining which critical data needs to be changed and then make those changes for you. Most of the errors we find are human error and most likely exist within every credit union's database. No one can evade the human factor causing inadvertent errors.



## Onsite Custom Training

DoveLink Business has provided customized training for more than a dozen years. Some of the topics in training include PowerOn, Symform, Symform PDF, Symconnect, SymXChange and OpCon. Our courses include “Fast Track to PowerOn”, “Exploring SymForms,” “Practical Understanding of OpCon,” and “Managing Episys from the Back Office.” Clients can see the benefit of having training on-site at their office (we feel this is the most effective).

Once we know what we are training, we will take a project from your “to-do” list incorporating it into the training. Instead of having generic exercises, attendees are developing for a real project or task. Why not complete something from your list while completing the training? We think this is a very good idea!

Another unique thing about our training is that we make it fun. Before we build the curriculum and itinerary, we learn about who all will be attending. What they like to do, hobbies, special interests, etc. Next, we incorporate activities around these concepts to reinforce the training, making it more fun for attendees. For example, on one training course we learned that most everyone loved to play cards. We developed a card game called “Symform Blackjack”. It was an instant hit! And yes, over the years this untraditional method has proven to be very effective in attendees retaining more from the training.

If you have specific training that you need and do not see it listed here, please ask. Our team has a very diverse skill set and many years of experience to offer. If feasible we can work to build a curriculum specifically to meet your needs.





## V-Training (Virtual Training)

**DoveLink Business** now provides virtual training services with the introduction of **V-Training**. On-site training is still the most effective method for training. However, often scheduling travel is simply not practical. Now with **V-Training** your credit union still benefits with customized training where participants can be geographically



dispersed. Courses include the same courses as onsite training. Here is a short list: Fast Track to PowerOn Development, Effective Knowledgebase Documents, Managing Processes with OpCon, Streamlining GOODNIGHT, Understanding the Power of Genesis, and Take Control with Formlocity.

## Custom Video Training

Lastly, you can choose to have us produce video training that can be loaded on your intranet. We recommend this as subsequent ongoing training after the initial session is complete.



## Other Available Services

**DoveLink Business** offers other services that our partners have depended on our experienced team to assist or manage them. The following list is some of the services that we have provided for other partners:

**Core Conversions** – We have been on the ground for new JHA clients coming onboard with Episys serving as a liaison for the credit union assisting in whatever capacity is needed. We have also worked with those partners that have chosen to move to a different core, leaving Episys behind.

**Core Upgrades** – Often our partners need assistance in upgrading from a different version of key components within Episys. We are able and ready to assist in ensuring that the upgrade process is managed and effectively implemented.

**Form Standardization** – Our team can assist you in bringing all your forms to a consistent standard. This is important for the purpose of representing your institution as well as those that ultimately become a programmed electronic form.



# Symitar Support Overview

## PowerOn Development

Of course, we all know that PowerOn is a scripting language used for Episys. DoveLink Business has seasoned and skilled professionals that have worked with PowerOn for over 21 years. Whether you need a simple report or complex project involving multiple PowerOns our team can exceed your expectations.

## EMA/EAR/ELA Customization

Symitar introduced their Enhanced Member Application (EMA), Enhanced Account Revision (EAR) solution and the Enhanced Loan Application (ELA) to improve the workflow for staff members performing tasks within each of these critical areas. If you are familiar with these sets of PowerOn specfiles you will understand that they are very complex and often fall short of what you need from them today.

## ARCU Support

DoveLink Business can assist you in building enhanced reports using ARCU, a database warehouse for reporting. Our team is experienced with SQL Server and SQ Server Reporting Services.

## Symform / Symform PDF Development

DoveLink Business supports development for traditional Symform or Symform PDF a form-creation software solution created by Symitar. Our team has assisted clients in standardizing forms, building them in Word or Adobe Acrobat (depending on which type of form you need), and customizing the PowerOn code within the core.

***Be sure to read more about Formlocity, a solution that simplifies electronic forms, notices, marketing, and letters.***



## Banno Support

Banno, Symitar's online banking platform, provides clients flexibility and some customization by utilizing an Application Program Interface (API). If Banno is your online banking solution DoveLink Business can assist you in adapting the online to specific goals for the credit union

## PowerFrame Support

In keeping with the trends and technologies the DoveLink Business team is ready to assist you as you move forward with PowerFrame. As with most new technologies released, the learning curve can, at times, be overwhelming. PowerFrame and microapps are no exception. The skills needed to be successful are not readily available for most credit union clients. As a result, conversion to the new platform can be time-consuming and costly. Our team is forging ahead with PowerFrame for our partners that have committed to this platform.

If your credit union has 10 or more forms that need to be converted to PowerFrame ask us about our alternative pricing method using a "per-form" approach over traditional hours.

**If you desire a more robust, faster and easier form management solution you may want to check out the section on Formlocity.**



# PowerOn Packaged Solutions

## Traditional PowerOn Packages

Over the course of 25+ years DoveLink Business has developed thousands of PowerOns for clients. Many become complete packages providing you with in-house PowerOn based solutions.

Here is a list of the most popular packages:

**Skip-A-Pay** – This package contains multiple programs managing skipped payment promotions for your credit union. The package includes a batch program to qualify members, custom batch reports, an on-demand user interface (UI) and an optional online UI. Performs any file maintenance automatically and supports institution specific parameters.

**Holiday / Vacation Loans** – This package gives you the ability to manage loan promotions throughout the year. The package includes a batch program to qualify members, custom batch reports, an on-demand user interface (UI) and an optional online UI. Performs any file maintenance automatically and supports institution specific parameters.

**Courtesy Pay** – This package is a set of 21 PowerOn specfiles that automate the process of managing overdraft tolerance within Episys while generating significant non-interest fee income. The specfiles use a configuration file that contains parameters that allow the credit union to adjust the solution without modifying the code. Additionally, DoveLink Business will include within the package hours that can be used to customize the entire solution to meet specific needs of the credit union. Clients using this package generate as much as \$50,000 (or more) in non-interest fee income.

The package provides reports, collection letters (generated at specified intervals 10, 21, 31 days, etc.), custom notices, activation letters and on-demand programs to perform additional FM for member preferences.

## PowerOn Catalog

Another PowerOn based solution that gives you the ability to effectively manage your custom PowerOn library. The specfiles used with the **PowerOn Catalog** can be used to determine which programs are being used and by whom. The PowerOn Catalog can help you understand how active reports are being utilized, as well as identify algorithms being used within programs, and thus, assist you in not “re-inventing the wheel”. It will also enable you to monitor programs and access data in “real-time”.

Aside from the purposes of why the **PowerOn Catalog** was first developed it has become a useful tool in preparing for major conversions, like switching from 2-digit to 4-digit types, converting to other platforms, etc.



## Job File Catalog (JFC)

Same concept, different tool! Our new **Job File Catalog** analyzes the hundreds of job files that every credit union has on the core. With **JFC** you gain a better knowledge of each job file, their relationships with each other, what PowerOns or

internal core programs they execute. Bring order to all your specfiles and job files for your credit union by using PowerOn Catalog and Job File Catalog.

## **Industry Required Solutions**

Over the course of providing ongoing support for credit unions we often build a solution that meets needs through the industry. Once our team has done this, DoveLink Business can offer your credit union a streamline approach for implementing the same technology. Here are several examples:

### **Upstart Scripting**

DoveLink Business has already built scripts that can be adapted to creating and fund loans from Upstart. There are two possible scenarios with Upstart, 1) doing a batch process that only requires PowerOn to manage the records and transaction in the core or 2) implement a Genesis based solution utilizing an Upstart API and directly creating and funding loans in the core in “real-time.”

### **AutoLink Scripting**

Like Upstart DoveLink Business has already built scripts that can be adapted for any credit union desiring to update car loans using Autolink within the Symitar core.

### **TCVS API Integration**

Software engineers with DoveLink Business have already created solutions that implement the TCVS API for verification of checks with the SSA. The credit union can choose to have a fully automated solution being executed from a PowerOn or a method using a web app manually.

Many credit unions have had issues with CORS and their web servers. The solution built by DoveLink Business does not have this issue.

## AVS/SSI Automation

DoveLink Business has successfully completed the AVS automation for several credit unions and can therefore assist your institution with turning this around quickly

## Q2 SDK Development

DoveLink Business professionals are also skilled when working with other third-party vendors. Many credit unions using Symitar also use the Q2 online banking platform. If you are one of those FIs and want to provide customization to the online bank via the Q2 SDK, we have trained developers ready and able to assist you with this effort.



# Custom Solution Development

Here at DoveLink Business developing custom solutions is the key to our business model. Our founder, Mark Christmas, has over 45 years' experience in software development. He attended Georgia Tech and worked for large corporations, like Sprint Corporation, before finding this niche market in supporting credit unions. Along with his expertise everyone on our team is well qualified and our senior developers have more than 20 years' experience.



Along with all this experience our developers have knowledge in a variety of programming languages and technologies combined with providing you with a superior development team. Our mission statement, ***“Where Commitment Empowers Vision,”*** says it best! Our commitment to you and your projects gives you the power to see your visions become reality.

If your projects require more than just PowerOn, our team has experience with Visual Studio, PyCharm, .NET, C#, ASP, PHP, Python, JAVA, C++, SQL and other widely used languages. We can develop within Episys and for web applications using HTML, JavaScript, jQuery, Ajax, and more. Our team understands XML used with SymXChange, JSON building solutions that are common within today's standard development platforms.







## Genesis – Integration Reimagined

**Genesis** is an advanced middleware technology platform that allows partners to experience a new reality in offering feature rich services for their members.

**Genesis** leverages the legacy of Quest bridging the gap to an infinite number of possibilities for the credit union. **Genesis** is at the origin of progress for your institution. The idea behind **Genesis** evolved from our existing partners who are constantly faced with emerging technologies that change quickly. Their goal is to serve their members by providing efficient and feature rich applications empowering their members to manage their financial success.

## Genesis Integration Reimagined



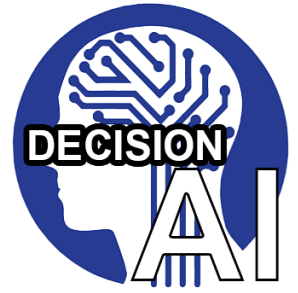
**Genesis** can be the foundation for complex solutions like onboarding members and/or originating and processing loans. Look at the picture on the next page of the booklet. Think of each module as a piece to a larger puzzle, where each piece

fits precisely with all the others to provide a more sophisticated and efficient method in performing key processes. Of course, in the center of the puzzle is the core that is critical in managing the data for each member.

Allow your imagination to soar! As your needs change, **Genesis** can be the center of change allowing you to reimagine integration into Episys. **Genesis** is already the origin of progress for partners who have implemented the platform to complete a variety of solutions. In the following pages of the booklet, you will see some of the possibilities that became reality.







**Artificial Intelligence** is becoming more prevalent in almost every aspect of software when decisions need to be made quickly and efficiently. **DoveLink Business**, in conjunction with **Zest AI™** decision engine, provides loan decisions minimizing the overall risks for new loan applications.

The solution is invoked from ELA inside the core. The first step is to gather critical data elements needed to pull credit on the applicant(s) and pass the model requested, personal data and the credit data to **Zest AI™**. Multiple models are automatically returned, along with the credit report to the core.

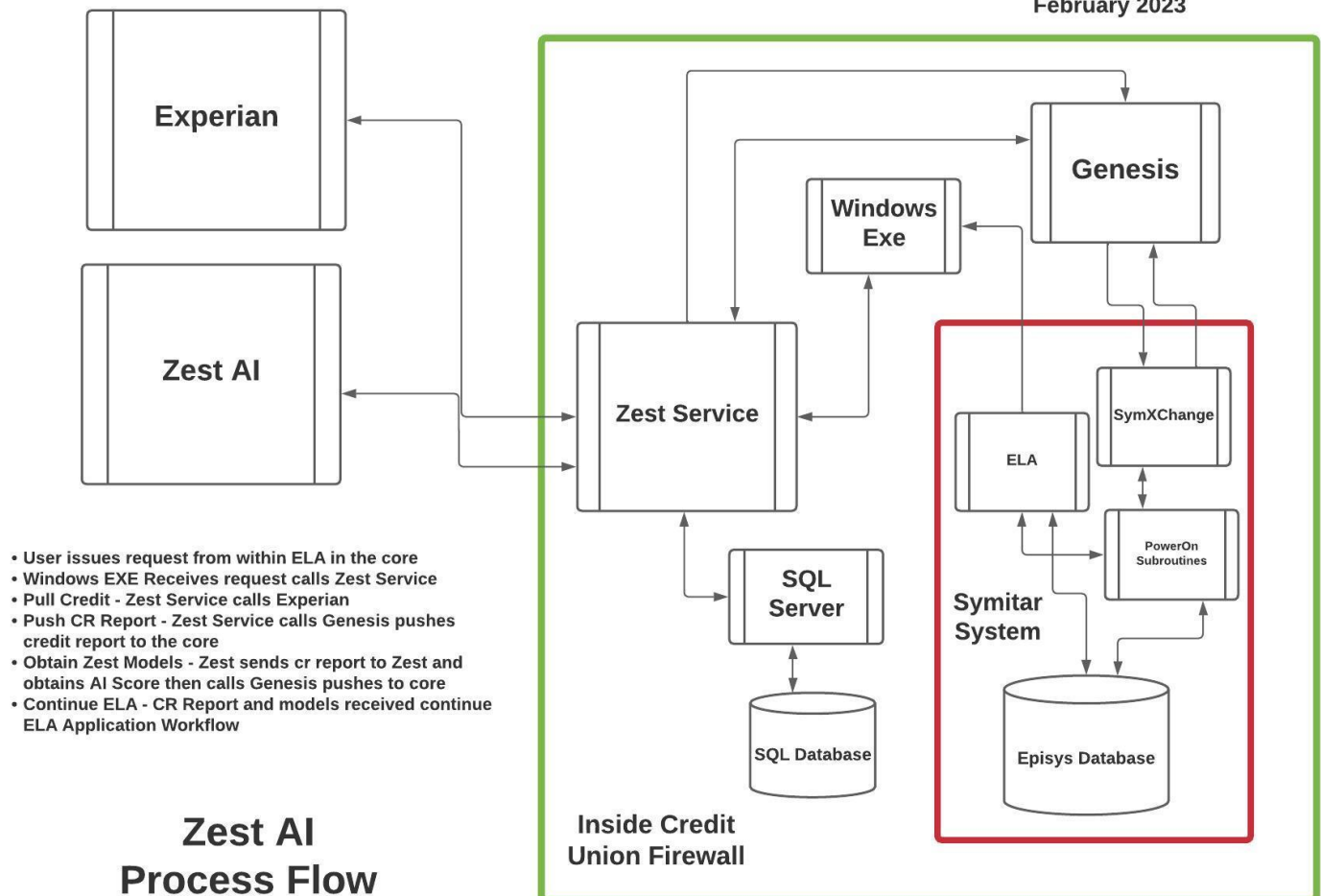


**Genesis Decision AI** fully integrates the revolutionary concepts of AI with the development power of Genesis streamlining the decision. The AI score can immediately approve or deny an application, while others are set to a pending

status within the application workflow. The solution provides the FI the ability to include additional business rules that are unique to the institution.

Utilizing the JHA Credit Retrieval system, Genesis Decision AI communicates directly to the credit bureau enabling the raw data from the bureau to be sent directly to **Zest AI™**. Once sent to the AI engine, the data is sent to the core via Genesis where it is then indirectly pulled into the core.

Community Choice  
Zest AI Integration  
DoveLink Business  
February 2023



## Genesis FPS Service with OFAC Force

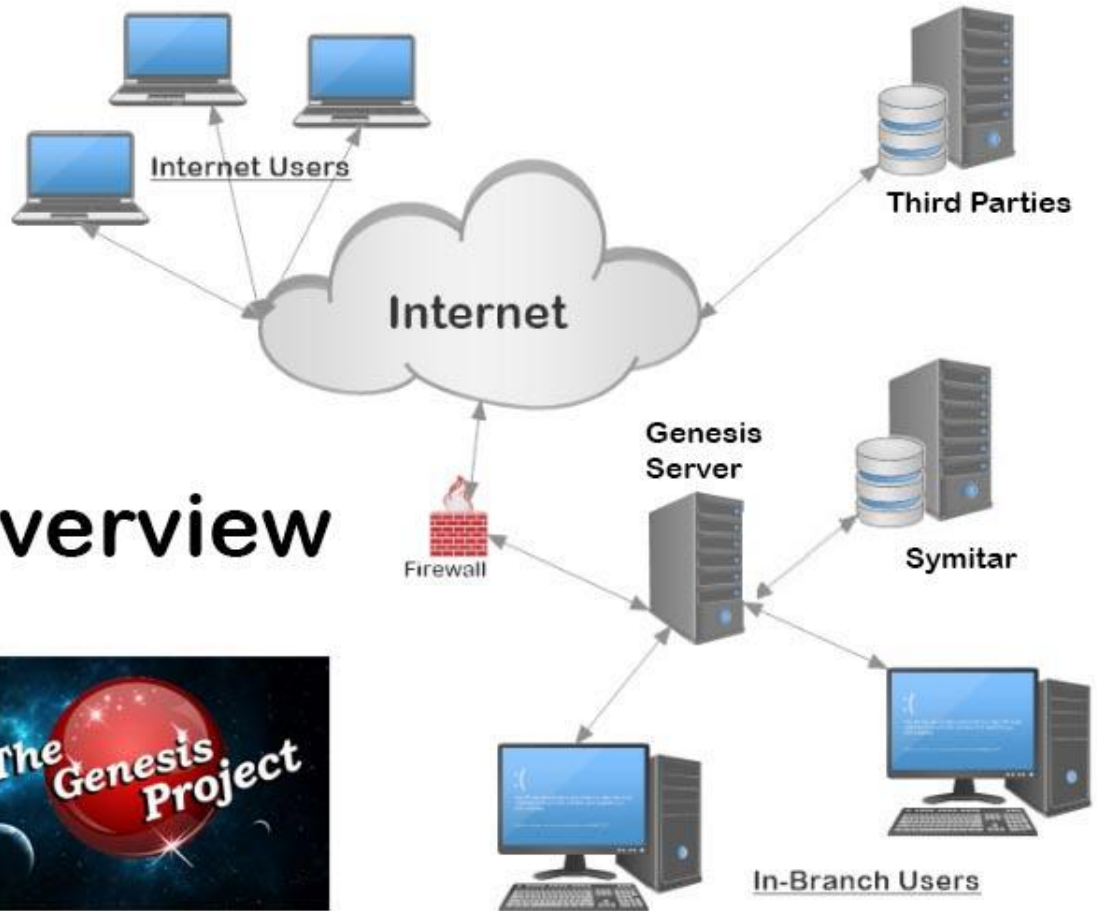
The first advanced solution released with the **Genesis** platform was the **Fraud Prevention Service (FPS)** with **OFAC Force**. **OFAC Force** supports on-demand and batch OFAC screening. Clients can select the screening performed using OFAC Watch provided by FIS. A second choice is clients can choose to utilize the DoveLink Business OFAC Cloud Database, or clients can choose to use screening methods from FIS and the DoveLink database.

**OFAC Force** can be completely integrated into core PowerOns such as those found in EMA and EAR. **OFAC Force** provides reporting for both on-demand screening and batch screening. There is no uploading data to an external computer to manually process your screens, then pulling it back into the core. You have the flexibility to have **OFAC Force** adapt to your credit union's needs.

**OFAC Force** also includes an "in-house" SQL Database that maintains every screen that is processed by **Genesis FPS**. Updates from the Department of Treasury are automatically completed without the intervention of your staff.



# Overview



**DoveLink**  
**Business**  
*"Where Commitment Empowers Vision"*

## Genesis Ignite

For clients that use FIS with QualiFile, IDV and IDA to manage and score when onboarding new members. **Genesis Ignite** is a ***solution integrating FIS QualiFile, IDV and IDA*** into the functionality within EMA and EAR. DoveLink Business is a certified FIS partner enabling our **Genesis platform** to efficiently incorporate these useful tools. ***If you don't use EMA or EAR let our team can extend Episys/Quest with this functionality uniquely customized to meet your specific needs.***

Included with the **Genesis Ignite** software, the DoveLink Business team will provide all the necessary customization for the EMA and EAR PowerOns. The solution utilizes SymXChange to manage the XML protocol in communicating between the core, **Genesis** and ultimately FIS. **Genesis Ignite** empowers your staff in automating decisions with QualiFile. It enhances verification of prospective members with Identity Verification (IDV). Minimizes the potential of fraud with IDA and complies with OFAC regulations using FIS OFAC Watch. Like **Genesis FPS**, requests are stored within a local SQL database for auditing purposes.

Find the power to ignite onboarding to a whole new level of efficiency.





## Genesis Ignite Plus

DoveLink Business is one of the very small number of vendors that is now certified to offer a solution for integrating FIS' BizChex product. **Jack Henry does not have BizChex on their roadmap to be integrated the same as QualiFile (ChexSystems). Regardless DoveLink Business can implement BizChex from within the Episys core providing the necessary information that you need to successfully onboard businesses or organizations.** Like QualiFile (ChexSystems), BizChex enables your staff to make substantiated decisions when onboarding non-consumer accounts. All the functionality backed by FIS can easily be integrated into EMA and EAR with **Genesis Ignite Plus**.

Included with the **Genesis Ignite Plus** software, the DoveLink Business team will provide all the necessary customization for the EMA and EAR PowerOns. The solution utilizes the **Genesis Platform** and SymXChange to manage the XML protocol with communicating between with the core. FIS has launched BizChex and will not be supporting non-consumer decision tools not utilizing BizChex.

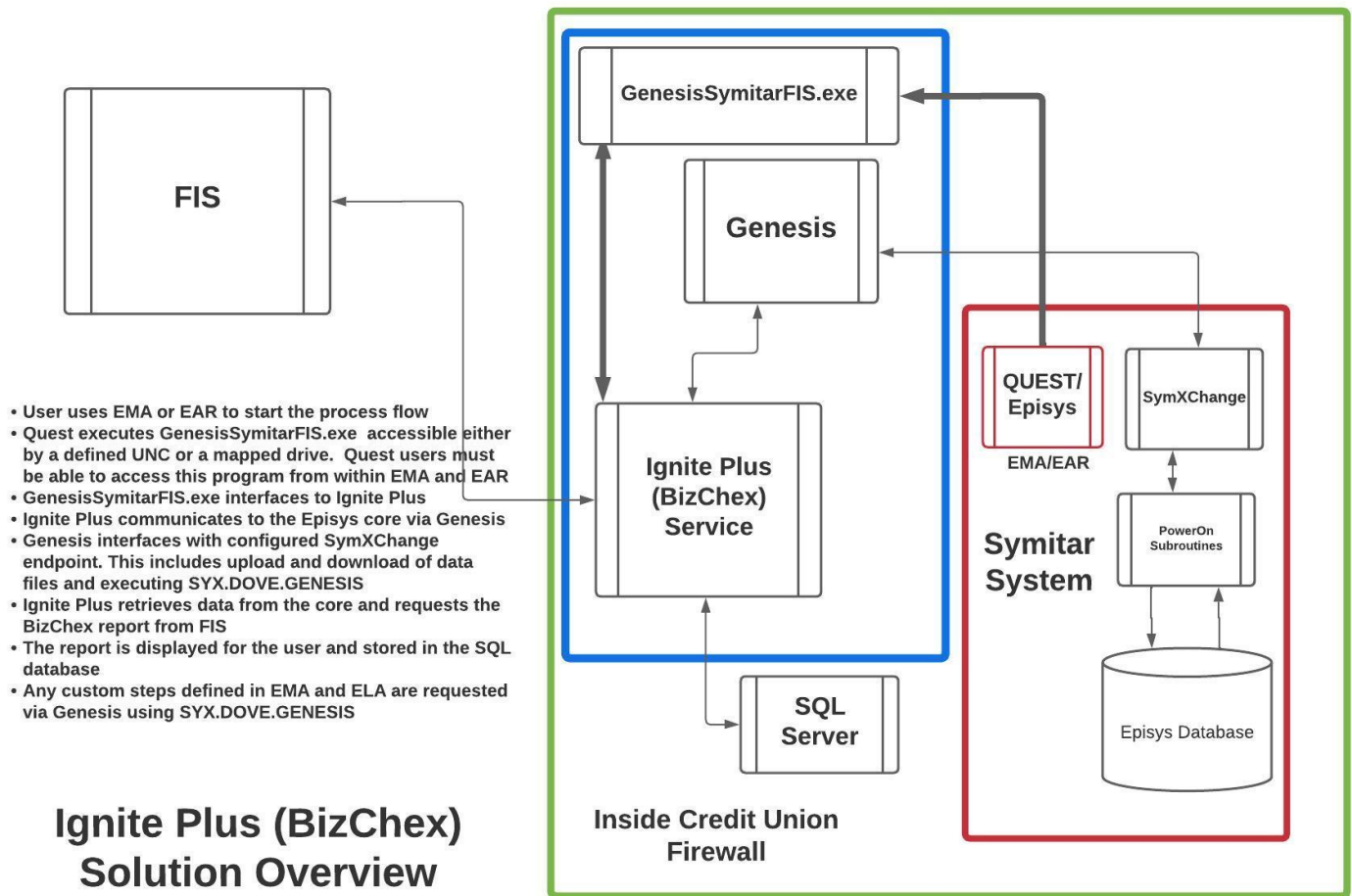
***If you don't use EMA or EAR let our team extend Episys with this functionality customized to meet your specific needs.***



Genesis Ignite and Genesis IgnitePlus have very similar process flows with the main exception being Genesis Ignite is directed toward consumer onboarding and

IgnitePlus is set for onboarding all types of business accounts. The following provides an overview of how these processes work.

DoveLink Business  
May 31, 2022



## Genesis Login Assist

Another useful tool to streamline daily tasks is **Login Assist**. **Login Assist** is a solution providing self-service setting up initial online access or password resets. It allows the member to opt-in for e-statements, audio, and other online services. Login Assist works with your existing online bank and is accessed by a URL to the Login Assist page.

The member can then enter an account number or their SSN to begin the validation process. **Login Assist** allows the member to have a verification code

sent to their cell phone. If they do not have or want to use their cell phone, they can enter a valid email address. If they choose not to use the 2-factor authentication by phone or email, **Login Assist** can still validate their identity using FIS IDA. IDA uses a series of questions and answers from the member's personal information. They are asked multiple choice questions to answer. The process will allow a second set of questions before abandoning the identity authentication not allowing them to continue.

Once the member is authenticated then they can set up their online banking password and be prompted to opt-in or out to other services and productions.







**Finally, a simplified solution for forms, letters, and notices.** Built on the power of Genesis, **Formlocity** is an exciting solution, changing the way you manage electronic forms and documents. No more frustration with attempting to manage convoluted electronic forms, letters, and notices. You have been here before looking for a simple solution, one that is not too complicated, doesn't require new skills and only has minimal development needs going forward. **Formlocity** brings a new velocity to professional forms, letters and notices leaving behind all other solutions. And yes, this includes Symform and Symform PDF.

DoveLink Business knows all the buzz around the push to move from Symform or Symform PDF to PowerFrame firsthand. Our team has been working with some of our partners for over two years. In that time, we learned quite a bit about PowerFrame. Check out the following thoughts about PowerFrame.

PowerFrame forms can take significantly more time than you would anticipate. Sure, there are forms that take an hour or two; but then you come across a complex form that requires 30, 40 or more hours to complete. On average, based on the forms that our team has completed, it takes about 10-15 hours per form. With Formlocity you can drastically reduce that time to less than 10 hours on average.

PowerFrame is a new technology that requires that your team have a skill set that hasn't been required before. If you have team members that are exceptionally

skilled with JavaScript and the technologies used with JavaScript, then you may be in good shape, otherwise you might want to consider Formlocity since the only skill you need is PowerOn

Did you know that PowerFrame has a serious flaw? And yes, JHA has it documented in eDocs. JHA warns that if a user has multiple sessions of Quest open at a time on different member accounts and one session happens to be PowerFrame perform file maintenance, that the system can update the records for the wrong member in one of the other sessions. Here is what they have documented in eDocs:

The warning can be found in the “Symitar PowerFrame Docs” page in eDocs

#### Usage Information

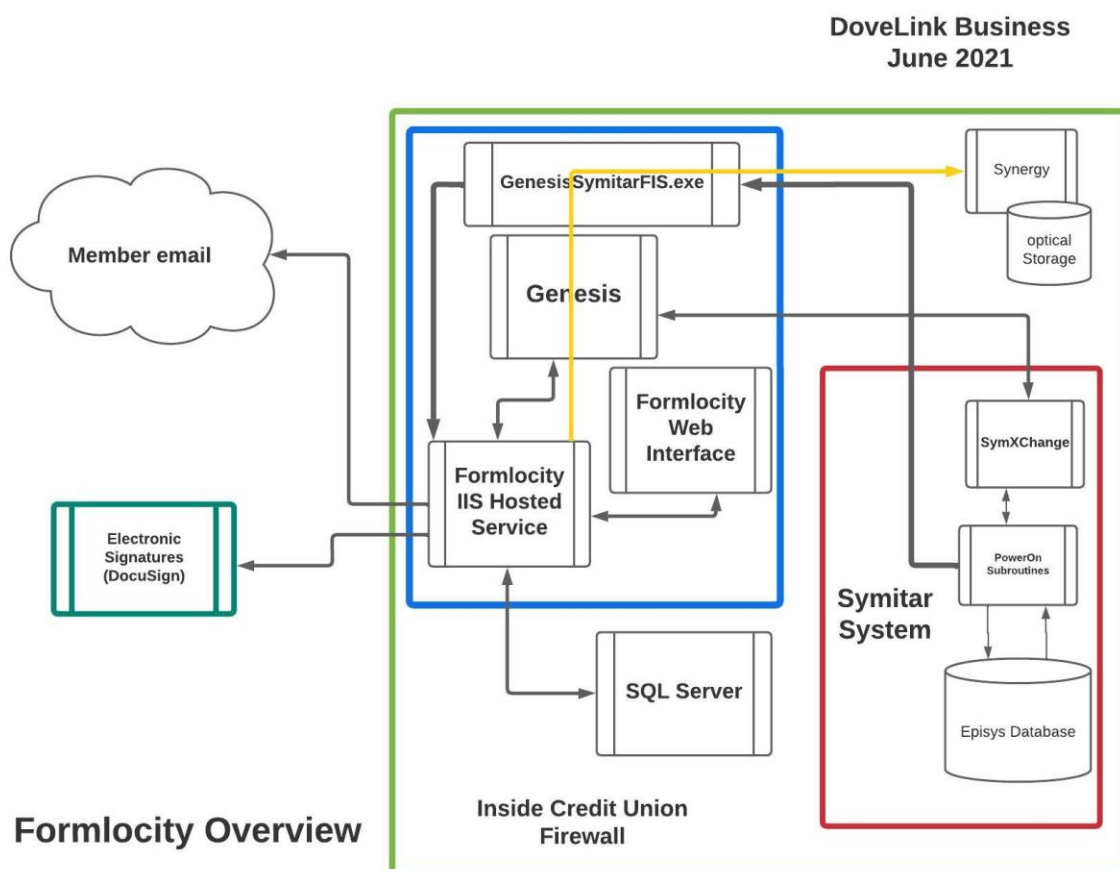
**CAUTION:** Do not have multiple sessions of Symitar Quest open when using Symitar PowerFrame Docs. Having multiple sessions open can result in the document saving the wrong account number.

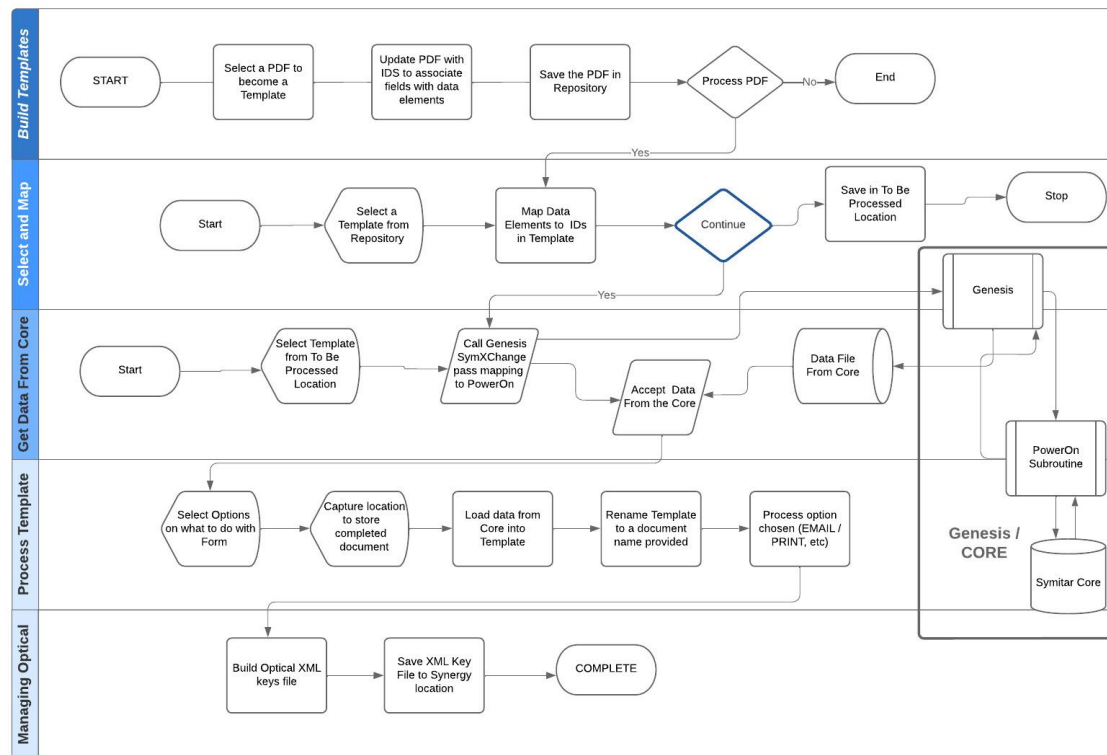
Keep in mind that Formlocity does far more than on-demand forms that work like Symform or PowerFrame.

- Formlocity supports generating large batches of standard notices, custom notices and letters that can be directly emailed to a member’s inbox. For confidentiality notices or letters can be password protected allowing only the recipient to open.
- Formlocity cuts your marketing costs by allowing your marketing team to use their own creativity, then target specific groups of members and deliver high quality marketing materials directly to the members. All this without the cost of printing and postage.
- Formlocity supports generating and delivering monthly Member Statements to your members
- Formlocity supports managing forms needed regularly for employees like vacation requests, HR forms, performance reviews, etc.
- Formlocity provides an optional online portal where members can access all their forms and documents without the need of contacting your credit union

- **Coming in 2025** – Formlocity will host a repository for the credit union to be able to store procedures, policies, training materials and any type of documents to manage them effectively. As with any repository, Formlocity will control documents that are checked out for updates and keep an ongoing archive that supports different versions and revisions.

Contact us if you would like to see a live demonstration of power and versatility with Formlocity. You will see firsthand how this solution will revolutionize your electronic forms, letters, and notices.



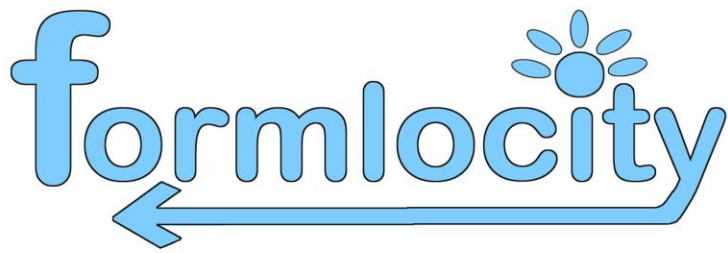


For more info on Formlocity check out these video links:

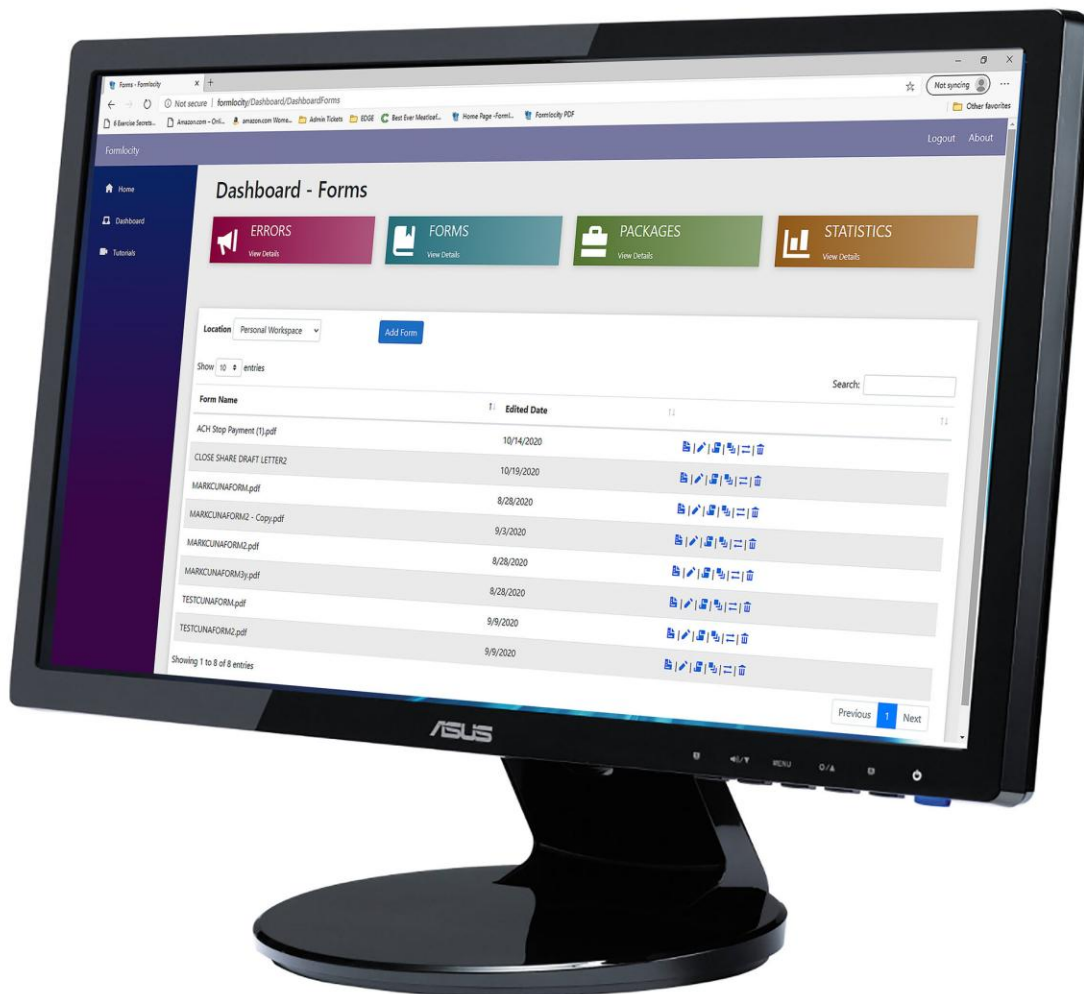
<https://dovelinkbusiness.com/Formlocity.mp4>

<https://dovelinkbusiness.com/FormlocityDemo.mp4>





## Document management for batch letters, notices and stand-alone forms



**Powered by**

**For more information visit our website at:  
[www.dovelinkbusiness.com](http://www.dovelinkbusiness.com)  
or call  
(770) 227-4774 option 4**

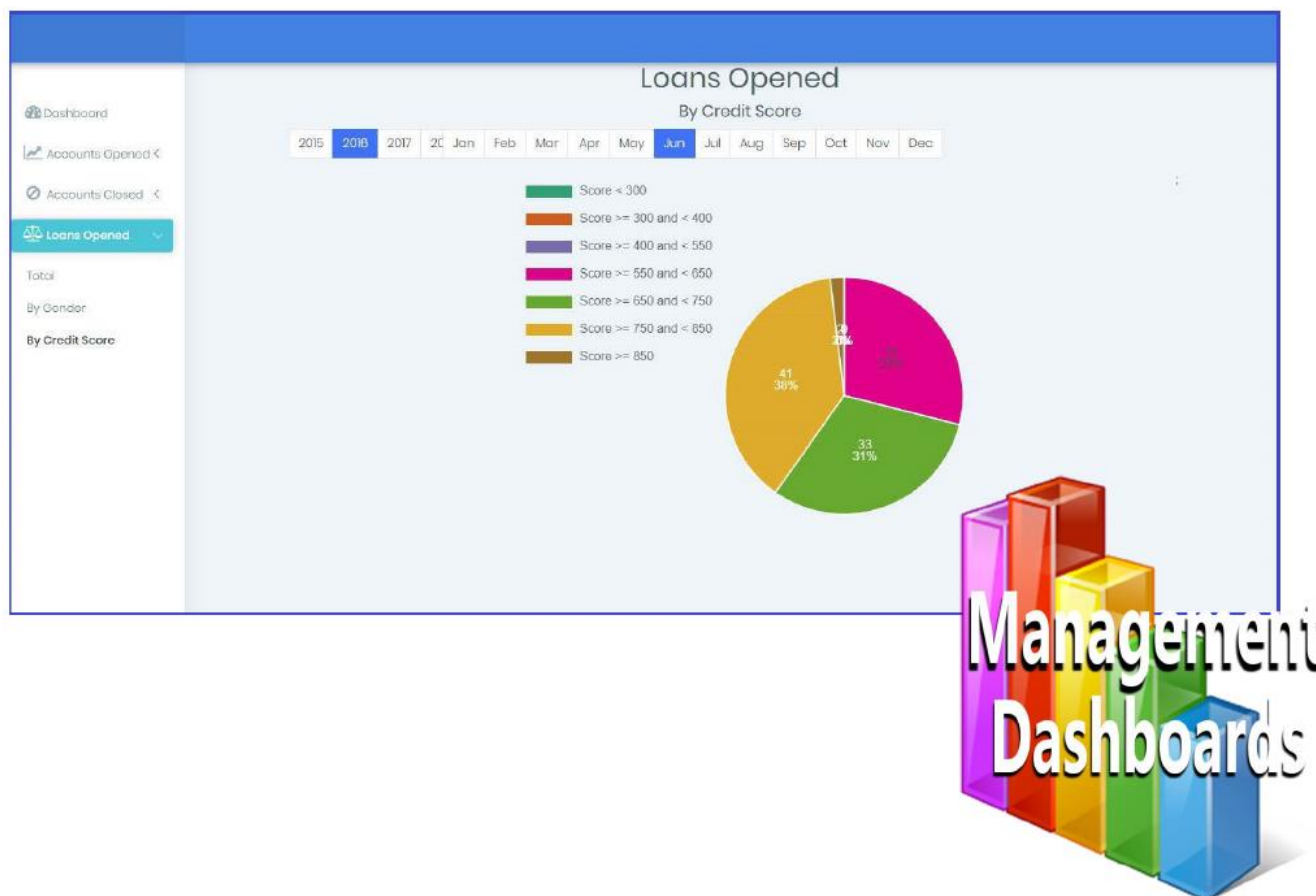


## Executive Management Dashboards

DoveLink provides a solution supporting easy to use dashboards that can be viewed on desktop computers, tablets, and smart phones. The **Management Dashboards** provide snapshots for your membership, loan portfolio, accounting and more.

You can choose to drill down on the data to see more detail about the set of data you are reviewing. These snapshots are used by managers and executives to understand the performance of key indicators for your credit union.

These dashboards do not require an expensive data warehouse. You simply build PowerOns to extract the data, then import the data into the dashboard solution.



## Other Genesis Solutions

**Wire Module** – Screen OFAC within the JHA Wire Module utilizing **OFAC Force** and Genesis.

**Unique IDs for Fraud Prevention** – Manage unique ids per member across the entire Episys database.

**Calyx Mortgage Loan Integration** – Process mortgage loans using Calyx and manage them within the core. Calyx PATH and Calyx Point are available.

**Enhanced Executive Dashboards** – Streamline our already versatile Executive Dashboards by interfacing to the core via Genesis.

**Paysett ACH Solution** – A unique ACH solution utilizing the Paysett foundation allowing members to generate ACH without help from the credit union staff.

**SurePay Bill** – Leverage real-time bill payments for your members with our web-based app integrated with the core via Genesis.

**Real-Time Fee Refunds** – Streamline refunding fees using a unique system that can notify approving staff in real-time even from a remote location.





## Still in the Works

DoveLink Business continues listening to our partners to transform the way credit unions currently onboard consumer and business members and originate and process loans. With that in mind we are currently working on the following upcoming solutions:

**Genesis Onboarding All Aboard** – One of the original pieces scheduled for Genesis will assist you in onboarding consumer and non-consumer members for in-branch and member facing applications.

**Genesis Loan Origination** – Loan application can be a bit intimidating for your member making the application process difficult. However, originating a loan application with Genesis provides interactive help ensuring that the application is accurate and simple for the end user.

**Fee Refunds** – A “real-time” approval solution for refunding member fees utilizing a chat feature between your front-line staff and staff with higher approval limits.

**Employee Tracking** – A custom tool that allows you to track employees providing you with the ability to streamline your management processes.



# Project / Ticket Support

## PROJECT COORDINATOR LIAISON TEAM (PCLT)

At DoveLink Business we understand that having a partner for outsourcing needs can become another task that must be managed. Therefore, launched in early 2022, the PCLT team, whose sole purpose is to alleviate the stress of coordinating projects to our Development and Support teams, began aiding our partners.

## PCLT RESPONSIBILITY

The PCLT is tasked to make sure tickets are not idle for unusual lengths of time. Should there be tickets that are not progressing as needed, then the PCLT Project Coordinator will escalate and see that the ticket moves forward in a timely manner. The Project Coordinator will assume the responsibility to work with whatever DoveLink Business team member necessary to see that a ticket progresses immediately. If there are issues that surface from either our partner or the DoveLink Business team member, the Project Coordinator will make sure that it is addressed and resolved quickly.

- For many partners finding the time or resources to scope out needs, build requirements, and submitting new tickets to DoveLink Business can be a challenge. The PCLT Project Coordinator will be tasked to proactively work with our partner to assess needs among all the various business units with the primary goal of streamlining processes, increasing overall efficiency for the credit union.
- Members of the PCLT become the primary contact for each of our partners. Collectively, they can ensure any type of escalation needed and can authorize emergency projects that may surface at any time.
- As the PCLT finds items that they see need to be addressed, they will first provide an overview of the item and request approval before any item is submitted as a ticket. This process may also require some effort in establishing requirements for a reasonable estimate for the credit union.

## UTILIZING THE PCLT

The following interactions between your institution and the PCLT will provide the building blocks for utilizing this important team as soon as possible.

- The Project Coordinator Lead will reach out to you first by email requesting to schedule a short meeting to discuss how best to implement this strategy for your credit union.
- The Project Administrator will also contact you by email to provide an overview of our weekly Active Project List and our end-of-month Project Summary Reports. The Project Administrator is responsible for scheduling meetings and addressing specific items as they relate to any open ticket.
- Once projects are in queue a Project Lead will then assist the credit union with scoping out requirements, providing any applicable estimates or Statement of Work documents and following up with the Development team.

## AN EXAMPLE OF HOW THE PCLT WORKS

Whether your credit union subscribes to CCUR or has purchased a block of PSS hours our goal is to see that your experience with DoveLink Business exceeds all expectations. Here is one way that we envision how the PCLT can address this goal.

We recommend allowing the Project Coordinator to work directly with various business units at the credit union. The PC will build key relationships with staff and seek out any ongoing issues they might be having and how to better improve their day-to-day processes.

After understanding an object, the PC will reach out to the primary contact to determine if the credit union wants to proceed with meeting the need discovered. If agreed to move forward, then the Project Leader will work to scope out requirements and obtain an estimate. If needed, the PC will follow up with the estimate to ensure that the credit union wants to move forward.

## ONGOING SUPPORT

Here are a few items that maximize ongoing support when utilizing the DoveLink Business team.

1. Regular Status Meetings – We all have a lot of meetings; but we feel a regular status meeting is critical for communication between our partners and the DoveLink Business team. Normally status meetings last 5-10 minutes and are scheduled weekly, bi-weekly, or monthly.
2. Active Project List – The Project Administrator will provide a weekly snapshot of all your projects with the Active Project List (APL)
3. SYM Access – While we do not make requirements as to how your credit union engages our team, we do recommend providing our team with some type of access to a test SYM for your credit union. This can be VPN, Splashtop, Logmein.com, TeamViewer, etc.
4. Escalating Tickets – You have complete control over your tickets including the ability to Escalate any ticket needing to go beyond typical priority levels.
5. Emergency Tickets – Some time you get something any that needs to be handled immediately. We ask that you provide justification for the emergency need and if approved resources will be diverted promptly to the ticket.



During the 3<sup>rd</sup> Quarter of 2024 DoveLink Business formalized our commitment to our credit union partners with the announcement of Project Concierge services.

With 25 years of experience DoveLink Business learned what are the hurdles for our partners to engage with our team. Project Concierge is a statement of our commitment to not just meet your expectations; but to go above and beyond.



DOVELINK BUSINESS

# NO HASSLE PROJECT COMPLETION

## PROJECT CONCIERGE

- ☒ Gathering Requirements
- ☒ Project Estimation
- ☒ Project Development
- ☒ Testing and Validation

Getting projects submitted in a timely manner can be a real challenge, let us lend a hand with Project Concierge.

### FIND OUT MORE



Questions?

[PCLT@DOVELINKBUSINESS.COM](mailto:PCLT@DOVELINKBUSINESS.COM)



Visit Our Website

[WWW.DOVELINKBUSINESS.COM](http://WWW.DOVELINKBUSINESS.COM)





# PROJECT CONCIERGE

## A COMPLIMENTARY SERVICE

### Our 6-step process for No Hassle Project Completion

- 1. Intake** – With as little as the project name and end user contact info we get your project moving
- 2. Inquest** – We meet with the end user and gather all the requirements
- 3. Inform** – With the requirements we provide you a project proposal including estimated hours and a timeline for completion
- 4. Initialize** – Your team signs off on the proposed plan of action and we create your ticket
- 5. Inspect** – We meet regularly with your team to keep the project on track through development, testing, certification, and making the project LIVE
- 6. Insure** – We provide any necessary training, documentation, and ongoing support to make your project a success





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## DoveLink Business Monthly Subscriptions

PROGRAMMING SVCS	SMS	CCUR	BUSINESS SVCS	SMS	CCUR	SUPPORT SVCS	SMS	CCUR	PACKAGED SOLUTIONS	SMS	CCUR
<b>SYMITAR DEVELOPMENT</b>			<b>BACK-OFFICE</b>			<b>SPECIAL PROJECTS &amp; MANAGEMENT</b>			<b>CUSTOM SOLUTIONS</b>		
PowerOn I / PowerOn II	✓	✓	Episys Back-Office	✓	✓	Estimates prior to project start	✓	✓	Genesis MiddleWare <sup>3/7</sup>	✗	✗
Symform Development	✓	✓	Database Verification Service	✓	✓	Online Project Submission/Tracking	✓	✓	FPS with OFAC Force <sup>2/3/8</sup>	✗	✗
Symform PDF Development	✓	✓	Form Standardization	✓	✓	Monthly Status Reports	✓	✓	Monthly Cloud DB Usage	✗	✗
Interactive NetTeller Specfiles	✓	✓	Process Documentation	✓	✓	Regularly Scheduled Status Calls	✓	✓	Ignite <sup>2/3/8</sup>	✗	✗
Symconnect Development		✓	Back-Office/Process Assessment <sup>4</sup>		✓	Detailed Time Assessment	✓	✓	Ignite Plus <sup>2/3/8</sup>	✗	✗
ARCU Development		✓	Merger Assistance <sup>4</sup>		✓	Server Hosting for Solutions <sup>6</sup>	✗	✗	JHA OFAC Wire Integration <sup>8</sup>	✗	✗
EMA/EAR/ELA Customization	✓	✓	2-digit to 4-digit Type Conversion		✓	Detailed Project Plans when applicable	✓	✓	Unique ID Management <sup>3/7/8</sup>	✗	✗
SymXChange Development		✓	OpCon Management/Training		✓	Dedicated Liaison from PCLT	✓	✓	Calxy Integration(PATH/Point) <sup>2/8</sup>	✗	✗
PowerFrame Support <sup>9</sup>		✓	Platform Conversion Support		✓	PCLT Requirements Support	✓	✓	Upstart File Processing Integration	✗	✗
			Third Party Integration <sup>1</sup>		✓				Executive Dashboards <sup>2/3</sup>	✗	✗
			Day-to-Day Non-Programming		✓				Formlocity <sup>2/3/8/9</sup>	✗	✗
									Real-Time Fee Refund <sup>2/3</sup>	✗	✗
<b>CUSTOM SOFTWARE</b>			<b>TEMP STAFFING</b>			<b>CLIENT SUPPORT</b>			Web Based SAP Clients (SAP,SAPH,SAPE) <sup>8</sup>		✗
.NET C# Development		✓	Remote Staffing Support	✓	✓	Help Desk Support <sup>1</sup>		✓	All Aboard w/ AI Assistant <sup>8</sup>		✗
ASP .NET C# Development		✓	Staff Placement Assistance		✗	Onsite Custom Training <sup>4</sup>		✓	Loan Origination solution w/ AI Assistant <sup>8</sup>		✗
JAVA Development		✓	Remote Software Development	✓	✓	Virtual Custom Training <sup>4</sup>		✓	The InfoSteward <sup>8</sup>		✗
JavaScript	✓	✓	Remote Back Office Support	✓	✓	Online Video Service		✗	Statement Management via Formlocity	✗	✗
jQuery	✓	✓				Video Production <sup>4</sup>		✗	Upstart Integration	✗	✗
Python Development		✓				Development (>= 50 hours and <= 200) <sup>4</sup>	✓	✓	Zest AI Integration <sup>8</sup>		✗
SQL Server		✓				Dedicated Project Contract Support <sup>4</sup>		✗	<b>POWERON BASED SOLUTIONS</b>		
Web Design/Development		✓				Solution Discounts <sup>5</sup>	✓	✓	Basic Courtesy Pay	✗	✗
									Advanced Custom Courtesy Pay	✗	✗
									PowerON Catalog with SQL <sup>8</sup>		✗
									Job File Catalog with SQL	✗	✗
<b>Monthly Rate / Hours</b>	<b>SMS</b>	<b>CCUR</b>	<b>Add'l Features / Benefits</b>	<b>SMS</b>	<b>CCUR</b>	<b>Add'l Features / Benefits</b>	<b>SMS</b>	<b>CCUR</b>	PowerOn Catalog Date/Time Automation	✗	✗
Flat Rate Does Not Increase		✓	Long term management of costs		✓	Discounted First Term and Step Up Options		✓	Custom Holiday Loan APP <sup>8</sup>	✗	✗
Base Rate / Varies by Actual Hours	✓		Continuous Support without renew	✓	✓	SSSH Credit Available when converting		✓	Seasonal Skip-A-Pay (SAP) <sup>8</sup>	✗	✗
800 Maximum Hours Per 12-Months		✓	Average Hourly Less than Bundles	✓	✓				Skip-A-Pay w/ Hardship (SAPH) <sup>8</sup>	✗	✗
No Maximum Rate adjusts	✓		12, 24, 36 month terms	✓	✓				Skip-A-Pay w/ Emergency Disaster (SAPE) <sup>8</sup>	✗	✗

### Footnotes for superscript designators <sup>1/2/3/4/5/6/7/8</sup>

1. Project may require additional software not included in monthly subscription
2. Additional Cost not covered by subscription discounted up to 20%
3. Requires Annual non-discounted license fee
4. Restrictions do apply for maximum allowable support
5. Standard discounts by CCUR subscription type: SMS 10%, CCUR 20%
6. Hosting plans vary - additional hardware 24/7 monitoring not included in base package
7. One-Time Implementation discount 20%
8. Requires Genesis
9. Includes 25 documents/Forms > 25 per document fee applies

### 4 - Restrictions for Services and Products

Only 1 merger support project with a 12-month term (must adhere to initial merger project requirements) Maximum Hours 150
Help Desk does not include after hour support. (After hours support is considered DPCS)
Onsite 1 3-day training or 1 Virtual 3-day training per 12-month term (does not include travel expenses)
Video Production now utilizes outside services cost vary on project
SMS no maximum , CCUR maximum is 800 per 12-month term.
Individual projects limited to 200 hours ea. Additional hours charged by the hour. Promotional terms may have different limits
One on-site assessment project within a 12-month term (does not include travel expenses)
Dedicated Project Contract Support (DPCS) falls outside the scope of CCUR subscriptions. However, with CCUR Premium rates are discounted

### CHART LEGEND

100% Covered by subscription unless footnote	✓
Discount may apply	✗
Service or Product not covered by subscription	



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