

# CREDIT

*Important Message from LSC Card Services*

# LSC<sup>®</sup>

*Helping Credit Unions Compete*

## **SUMMARY**

The eZBusiness Card Management Rewrite communication series provides information needed to prepare your Administrators and Companies for the upcoming eZBusiness migration.

## **FIS ACTION**

### **DOWNTIME MESSAGE**

As the migration is completed, the existing eZBusiness website will display a message advising users attempting to access the site how long it will be unavailable, and promoting the exciting new changes coming with the update.

Company Administrators will be directed to their financial institution to answer any questions they have about the upcoming changes.

## **EXPENSE MANAGEMENT**

We have many new features and functionality to share. Please look for a separate communication specific to Expense Management coming soon.

## **CLIENT ACTION**

### **EZBUSINESS USER RESOURCES**

There are several application resources now available!

**Marketing Materials:** Marketing materials are available for you to promote eZBusiness to your small business, mid-market and commercial card customers. These toolkits include posters, brochures, postcards, email templates, digital ads, landing pages and social media templates that can be branded with your financial institution's logo. Click [here](#) to visit the eZBusiness Toolkit site.



Custom Branded Marketing Materials: If you would like to discuss creating custom branded marketing materials, marketing strategy, adoption and/or Marketing campaign execution for your eZBusiness solution, please contact LSC.

- FIS Program Services is focused on providing FIS clients with adoption marketing strategy and consulting, credit/debit card portfolio analysis and adoption marketing campaign execution. We aim to provide outstanding value, build long-term relationships and give clients the best strategy, analytics and adoption solutions available in the industry.

**Company Admin User Guide**

We encourage you to share this user guide with your Company Admins. It contains all the eZBusiness information needed for you, the financial institution, and your company administrators to navigate and perform tasks in the newly redesigned eZBusiness application.

To access the guide, log into **Client Portal** and cut and paste the following link into the URL address field:

<https://my.fisglobal.com/-/media/clientportal/files/base2000/documentation/user-guide/admin-user-guide-v1.pdf>

**Financial Institution Admin User Guide**

This user guide contains information specific to helping Issuers manage their Commercial & Business customers and set ups within the eZBusiness application. The information in this guide is specific to the financial institution and would not be used by Company Admins.

Again, access the guide by logging into **Client Portal** and pasting the link below into the URL address field:

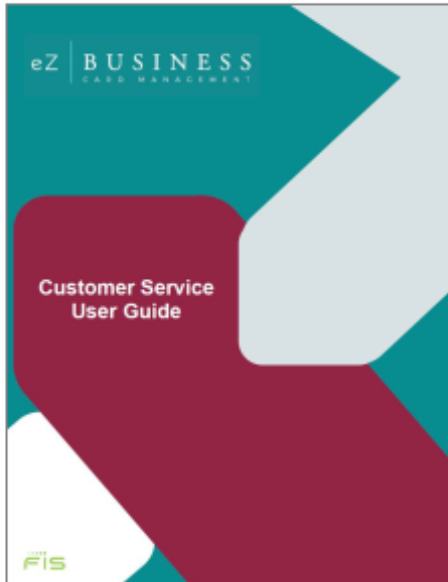
<https://my.fisglobal.com/-/media/clientportal/files/base2000/documentation/user-guide/fi-admin-only-user-guide-v1.pdf>



### Customer Service User Guide

This user guide should be shared with your Company Admins and includes information on performing customer service functions in the new redesigned eZBusiness.

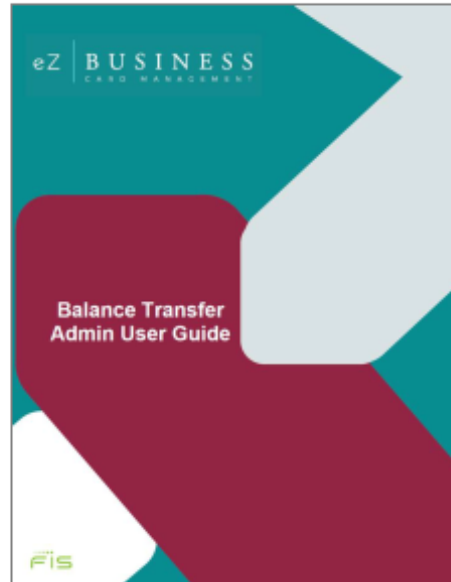
**LINK:** <https://my.fisglobal.com/-/media/clientportal/files/base2000/documentation/user-guide/customer-service-user-guide-v1.pdf>



### Balance transfer user Guide

This user guide should be shared with your Company Admins and includes information on performing balance transfer functions in the new redesigned eZBusiness.

**LINK:** <https://my.fisglobal.com/-/media/clientportal/files/base2000/documentation/user-guide/balance-transfer-fi-admin-user-guide-v1.pdf>




In addition to the four guides listed above, look for the following eZBusiness user guides to be published in Client Portal in the future.

- Expense Management User Guide
- E-Payables User Guide
- Reports User Guide

eLearning Modules: We have eLearning modules for both Issuer and Company level administrators. These modules will provide an overview of the new eZBusiness application and allows admins to simulate many of the functions they may use when completing tasks in eZBusiness. These simulations are available for both FI and Company Administrators. Please click [here](#) to access the current simulations.



 Please note: We will update existing simulations regularly. New simulations may be added at any time.

## IMPORTANT REMINDERS

### COMMUNICATIONS

We recommend that you take the following steps to ensure your companies are ready to take advantage of the enhanced features when they go live on May 20, 2019.

1. Communicate often with your companies and internal staff over the next 30 days about the upcoming changes. Some communication channels to consider include:

- Emails
- Letters
- Outbound phone calls
- Statement inserts
- Statement messages
- Training sessions

2. Share the eZBusiness user resources with Company Admin and internal staff.

3. Register for the upcoming training webinar referenced below.

### MIGRATION WEEKEND/SITE AVAILABILITY REMINDER

To allow time for the installation of the rewrite, the eZBusinessCardManagement website will be temporarily unavailable from 10:30 p.m. ET on Friday, May 17, 2019 through 8:00 a.m. ET on Monday, May 20. During this timeframe, eZBusiness will be unavailable and administrators attempting to access the site will be notified of the ongoing maintenance. Please note that future communications will include downtime messaging.



Clients and their Admins CAN continue to perform actions within the site such as make payments, request changes, etc. until 9:00pm ET on Friday, May 17, 2019.

### PURGING DATA REMINDER

The following information in eZBusiness will be purged as part of the migration, and unavailable after May 17:

- Customer Service – Online message history older than 24 months, including messages in the Incoming Message queue and composed messages
- Expense Management – Expense reports (in any status) older than 24 months
- Reporting – Reports with a Last Run Date older than 24 months

Report Type	Report Name	Date Created	Last Run	Actions
Commercial Card Transaction Report by Account		12/03/2014 15:06	03/01/2014 08:17	Edit Delete Export Run
		03/01/2019 08:15	Ready	

- Security – All activity performed by an administrator that is older than 24 months



We strongly encourage you to log into eZBusiness and save any information you need that is dated on or before May 17, 2017. Any information that has not been saved by 10:30 p.m. ET Friday, May 17 will no longer be available after the migration.

## UPCOMING EZBUSINESS WEBINARS

### EZBUSINESS FOR FIs WEBINAR

With the launch of the new site, FIS will host multiple complimentary educational webinar sessions for **eZBusiness for FIs** clients. For those who are unable to attend, the webinar sessions will be recorded and made available for review.

This informational webinar provides a demonstration of the new eZBusiness for FIs platform and focuses on how to navigate the system's new features and functionality.

- The webinar sessions are designed for current application administrators who have a working knowledge of the eZBusiness for FIs system functionality.
- The sessions are **ONLY** offered to financial institution administrators, and are designed to provide a comprehensive overview of everything the site rewrite has to offer.
- Do **NOT** forward the registration link to company administrators employed by the cardholder. They are not eligible to attend the webinar sessions.

Please click on the registration icon below to sign up for the session on **Wednesday, May 15, at 11:00 a.m. ET**

