CARD SUITE SETUP FORM

# Overview

This document is requiredfor onboarding to Card Suite to complete the onboarding process. Please read this document carefully in its entirety, confirm all prefilled values, and complete any missing fields as they are required.

## Financial Institution Information

Please ensure all information is captured below.

|  |  |  |  |
| --- | --- | --- | --- |
| Financial Institution Information | | | |
| Bank Name |  | **Bank EID** |  |
| Customer # / Corp ID / Routing Number |  | **Client Project Contact Name** |  |
| Client Project Contact Email |  | **Project Contact Phone** |  |
| Client Credit Platform | Base2000 (B2K)  Not Applicable/No Credit Platform  PaymentsOne Credit (P1C) | | |
| Client Debit Platform | Brown Deer (BCFS)  Not Applicable/No Debit Platform  PaymentsOne Debit (P1D) Switches  New Berlin (FISB)  FISB with Credit  Legacy WorldPay (MCDP)  MCDP with Credit  Transfund  Transfund with Credit  Norcross  Pass Through  Pass Through with Credit | | |

## Product Information

Please select the setup type, product and Card Suite type. If you are using an integrated version of Card Suite, and will be using a 3rd party integrator, then please note and NDA is required for the onboarding. If you are using Card Suite Pro, and selected any a la carte products, **each** selected feature requires its own executed agreement or be referenced in the main executed sold agreement.

|  |  |  |  |
| --- | --- | --- | --- |
| Product Information | | | |
| Select One | Net New (No existing FIS card controls product)  Renewal or Migration from existing card controls product (select below)  SecurLOCK Equip  Mobi Money  Card App  Card Suite Lite | | |
| Product Selected | Card Suite Lite  Card Suite Pro | **Card Suite Type** | Standalone  Custom Branded  Integrated (*SDK/API*) |
| Integration Type (If Selected Above) | FIS Mobile – Flex  FIS Mobile – Studio  Code Connect API  Software Developer Kit (Card Suite Pro Only)  3rd Party Integrator | | |
| 3rd Party Integrator Name, If Selected | | Please input integrator name here | |
| Add On Options (Pro Only) | eZcard  Full-Service Disputes (DRC)  Digital Issuance  Tokenization (Required for all Card Suite Pro) | | |
| Client Billing (Select One) | Active Cards on File (Card Suite Pro Only)  Active Users (Card Suite Lite Only. Available for Pro if desired)  If **Active Users** is selected, will the client be doing combined billing?  Yes  No | | |
| FIS Call Center Services | | Yes  No If yes, estimated number of registered cards:  If currently using FIS Call Center, use existing toll-free number?  Yes  No If yes, number: \_\_\_\_\_\_\_\_\_\_\_\_\_ | |

# Administrative Suite Admin Information

Admin Suite is the application you use to access and maintain Card Suite. This application is accessible by first logging into the IDP portal, and then launching the application from the Admin Suite tile. FIS will set up two initial administrators for your institution. Your administrators will grant and control access for other users to Admin Suite. Please complete the below field for each administrator you would like to setup. ***If you are currently using PaymentsOne UI, FIS will use the existing firm and user admins currently set up.***

|  |  |  |  |
| --- | --- | --- | --- |
| IDP Administrators | | | |
| Full Name |  | | |
| Email Address |  | **Existing IDP Username (If already using IDP)** |  |
| Full Name |  | | |
| Email Address |  | **Existing IDP Username (If already using IDP)** |  |

**Financial Institution Branding Information**

Card Suite uses branding images, or brand color specified via the HEX color code, for the Card Suite app. Please see the below table for image types required and the specifications for each prior to submitting these items to the Onboarding Team.

|  |  |  |
| --- | --- | --- |
| Type | Specifications | Description |
| Institution Logo | 512 x 512 pixels, JPEG or PNG | Institution’s logo to be represented in app |
| Light Background Logo | 111 x 24 pixels, transparent PNG | Institution’s logo to be represented in app presented against a light background. Example: logo presented on a white background |
| Dark Background Logo | 111 x 24 pixels, transparent PNG | Institution’s logo to be represented in app presented against a dark background. Example: logo presented on a black background |
| Card Image Art | 1010 x 630 pixels, JPEG or PNG | This is the background card art image. It must not contain PAN, cardholder name, contactless logo or other text. Can include FI logo and network name |
| Hex Color Code | Numerical HEX Code | If no images are submitted, please include HEX code |

**BIN Information**

In the below table please provide the BINs, select credit or debit for each BIN, and provide the name of the card art image file that was provided to the Onboarding Team that will be associated to each BIN. The Onboarding Team will configure the card image to the BIN(s) specified for Card Suite.

|  |  |  |
| --- | --- | --- |
| BIN | Credit or Debit | Card Art Branding Image Name |
|  | Credit  Debit |  |
|  | Credit  Debit |  |
|  | Credit  Debit |  |
|  | Credit  Debit |  |
|  | Credit  Debit |  |
|  | Credit  Debit |  |

**Financial Institution Details App Information**

The below institution detail is required and will be included in the Card Suite app as details for your financial institution.

|  |  |  |  |
| --- | --- | --- | --- |
| Financial Institution Details | | | |
| Street Address |  | | |
| City |  | State/ZIP |  |
| Facebook URL |  | | |
| X.com URL |  | | |
| Website URL |  | | |
| Customer Support Email |  | | |
| Customer Support Phone Number |  | | |
| Hours of Operation |  | | |

### Additional Resources

For questions or assistance related to this form please contact the project team members listed below.

|  |  |  |
| --- | --- | --- |
| Functional Area | Name | Email |
| Card Suite Project Manager | NAME HERE | [NAMEHERE@fisglobal.com](mailto:namehere@fisglobal.com) |
| Client Onboarding ICA | NAME HERE | [NAMEHERE@fisglobal.com](mailto:namehere@fisglobal.com) |

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