VisaVoila

Agent ID: [_____]

Password: [_____]

Forgot your password? | Reset your password

LOGIN
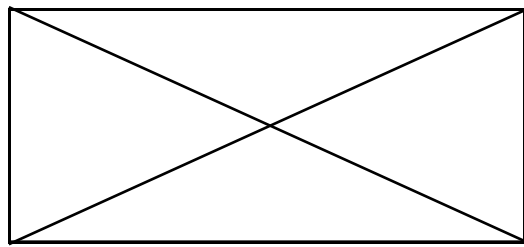
VisaVoila

Customer ID: [   ]

[SEARCH]

VisaVoila

Customer Card Details

Primary Card

Card Number :

Expiry date :

Balance :

Status :
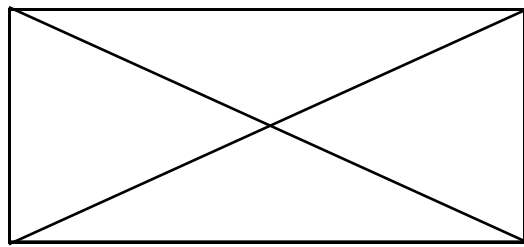
Statement Information

Secondary Card

Card Number :

Expiry date :

Balance :
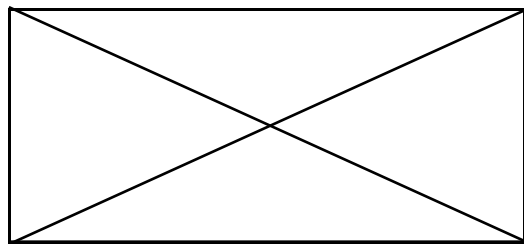
Status :

Statement Information

Customer360

Agent ID:

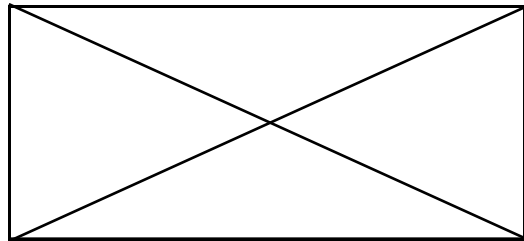Password:

Forgot your password? | Reset your password

LOGIN

Customer360

Customer ID:

SEARCH

Customer360

Customer Dashboard

Customer Information

Customer Name :
Customer ID :
Address :
Contact :
Date of Birth :

Red Flag Notes

Red Flag Notes xxx
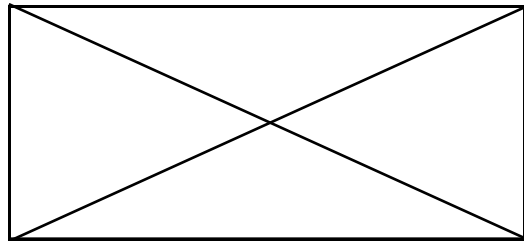
Financial Goals

Active Financial Goals
None

Wealth Advisor
xxx

Current Offers

xxx

Customer360

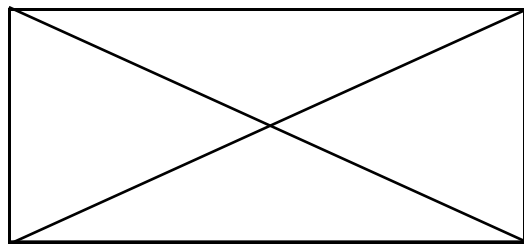## Product Information

Product 1
Product ID
Product Information

Product 2
Product ID
Product Information

Product 3
Product ID
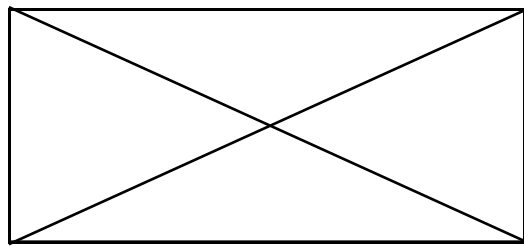Product Information

GYC Insurance

Agent ID:

Password:

Forgot your password? | Reset your password
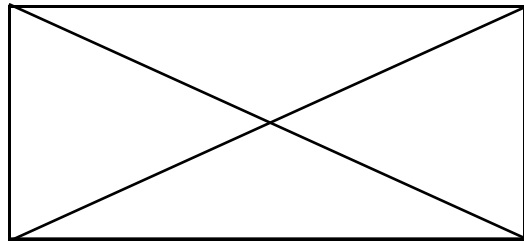
LOGIN

GYC Insurance

Customer First Name:

Customer Last Name:

SEARCH

GYC Insurance

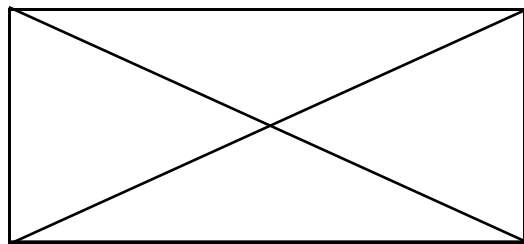## Customer Search Results

Customer Name

Customer Phone #

Customer Name

Customer Phone #

Customer Name

Customer Phone #

GYC Insurance

Customer Information

Customer Name

      Phone # :   xxx-xxx-xxxx

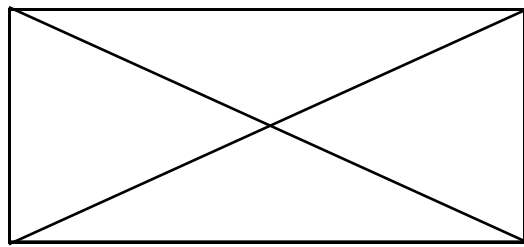   Date of Birth :   dd-mm-yyyy

      Mailing Address: xxx

Product Information

Product 1

Product ID :   xxx-xxxx
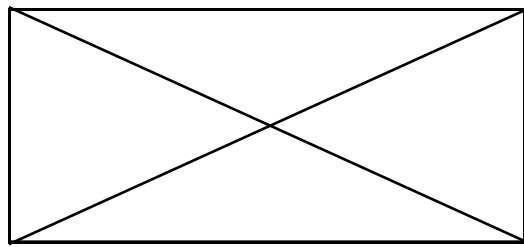
Product Information :   xxx

JiggyBank

Agent ID:

Password:

Forgot your password? | Reset your password
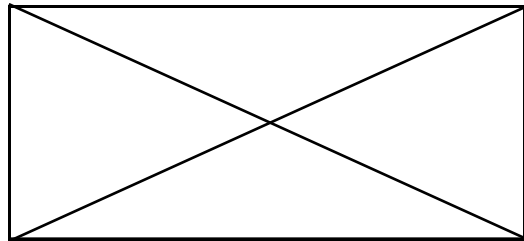
LOGIN

JiggyBank

Customer First Name:

Customer Last Name:

Phone:

SEARCH

JiggyBank

Customer Search Results

Customer Name
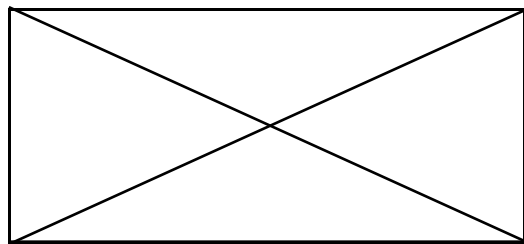
Customer ID

Customer Contact Details

Customer Name

Customer ID

Customer Contact Details

Advanced Search
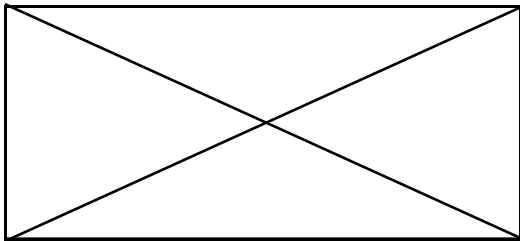
JiggyBank

Advanced Search

Customer Name: ABC

Phone number: 123-456-7890

Address:

Date of Birth:

SEARCH

JiggyBank

Customer Dashboard

Customer Information

Customer Name
Customer ID
Address
Contact
Date of Birth

Products

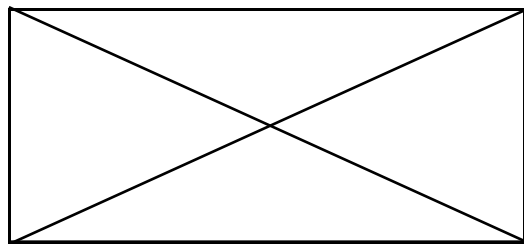**Product 1**
Product ID
Product Information

Product 2
Product ID
Product Information

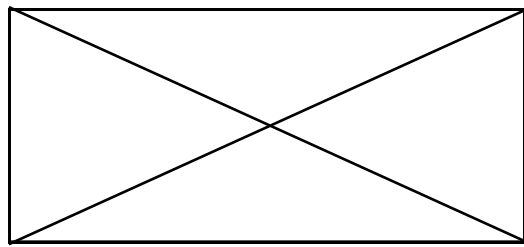### Recent Transactions

MasterYourCard

Agent ID:

Password:

Forgot your password? | Reset your password
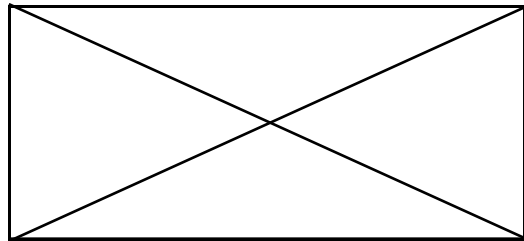
LOGIN

MasterYourCard

Customer ID:

SEARCH

MasterYourCard

Customer Card Details

Primary Card

Card Number :

Expiry date :

Balance :

Status :

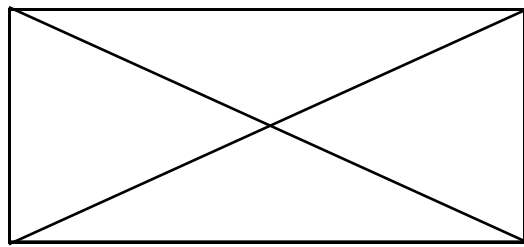Statement Information

Secondary Card

Card Number :

Expiry date :

Balance :
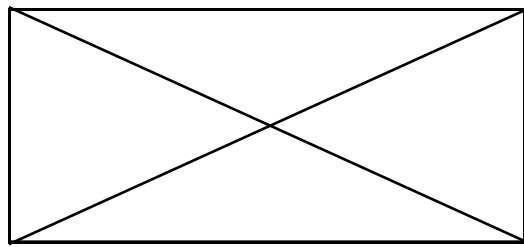
Status :

Statement Information

TrueVerify

Agent ID:

Password:
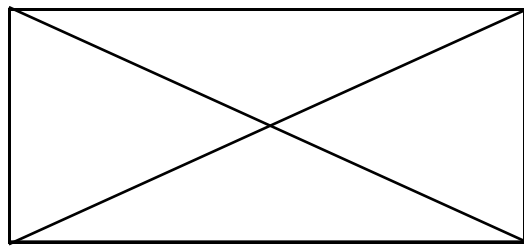
Forgot your password? | Reset your password

LOGIN

TrueVerify

Customer ID: [   ]

SEARCH

TrueVerify

Customer Registration Status

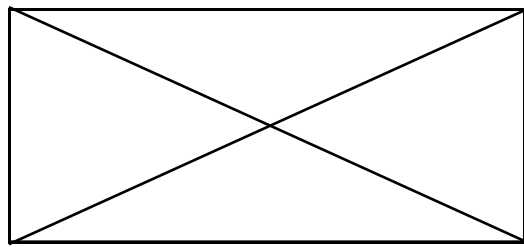Customer Name :   ABC

Customer ID :   xxx

Customer Contact :   xxx-xxx-xxxx
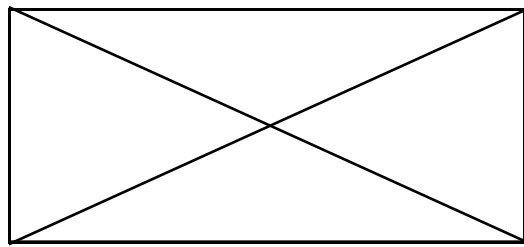
Status :   Registered

Send Push Notification

TrueVerify

Customer Registration Status

Push notification has been sent successfully!

TrueVerify

Customer Registration Status

Customer has been verified successfully!