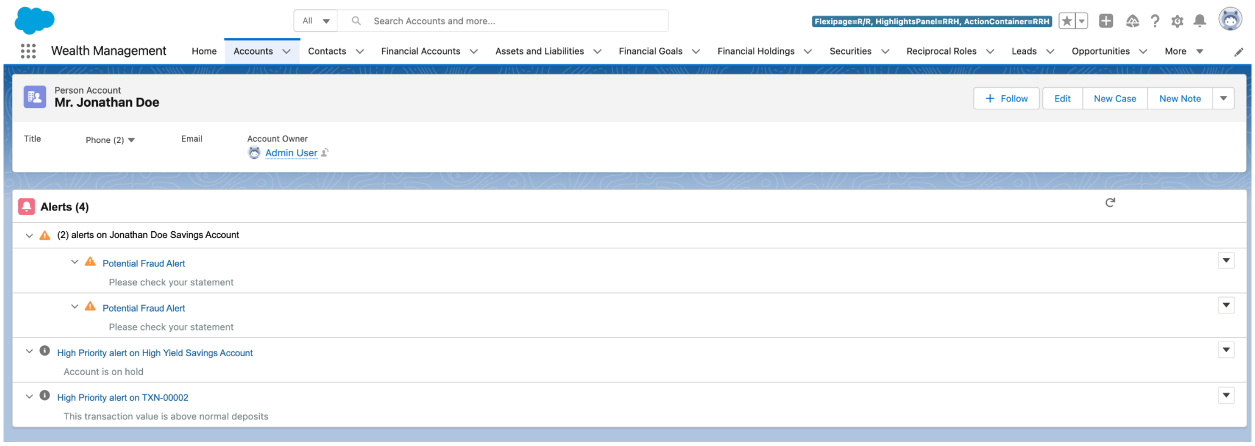
Record Alerts



Overview

Record Alerts help improve customer satisfaction by alerting your agents to changes in customer records that require action. Agents can quickly scan records for timely, relevant notifications that are based on information from your core banking system or from alerts that are stored in Salesforce.

Alert card components are built using FlexCards and are configurable using OmniStudio.

Use Case Scenario

Display alerts relevant to relationship managers or contact center agents in the context of a customer interaction.

For example, during a phone conversation with a customer, an agent sees an alert for a low balance. When the agent opens the alert, they see that the client has less than $1000 in the Financial Account where all their direct withdrawals come from. By notifying the customer of the low balance, the customer is able to transfer more money to the Financial Account to ensure all their bills are paid on time.

Financial account transaction, financial account, and person account alerts can also be aggregated and displayed in a hierarchical manner using Business APIs. Users can snooze and dismiss alerts as needed.

Business Objective

Unify and surface relevant information to deepen engagement with every customer interaction.

Power more proactive service with a streamlined view of relevant alerts generated from within Financial Services Cloud or other enterprise applications. Provide service agents with the appropriate context to make every interaction efficient and personalized.

Datapack includes:

FlexCards

- AlertCard
- GroupedAlert
- SingleAlert
- DismissFlyout
- SnoozeFlyout

Integration Procedures

- ipAlertFetcher
- ipAlertDismiss
- ipAlertSnooze