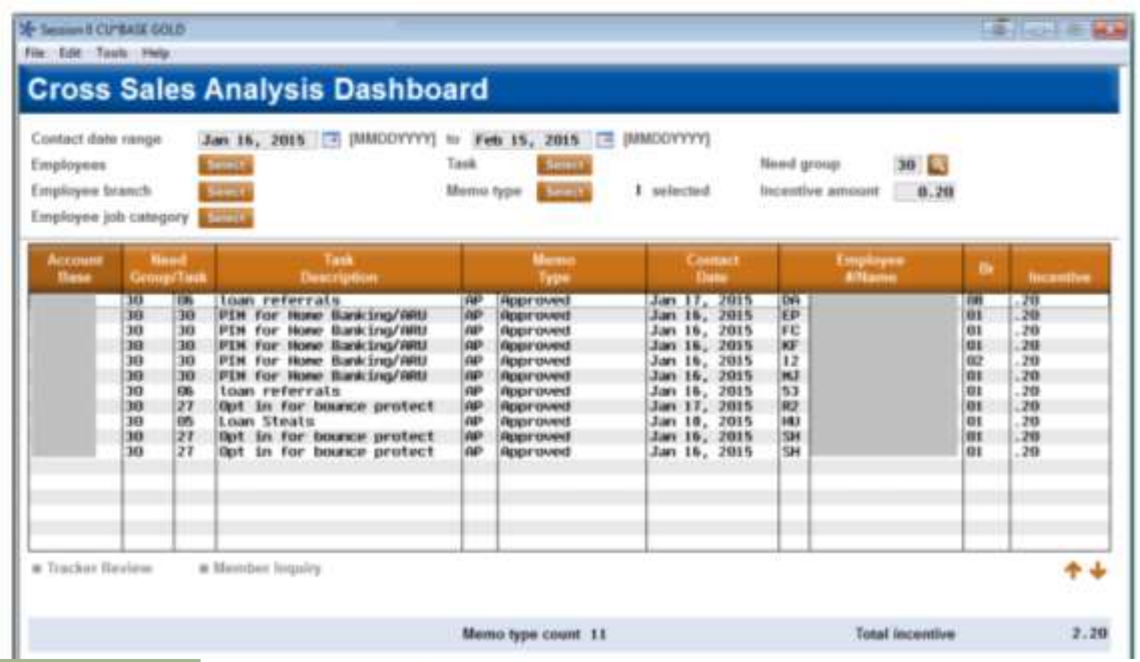
Cross Sales Since Last Year

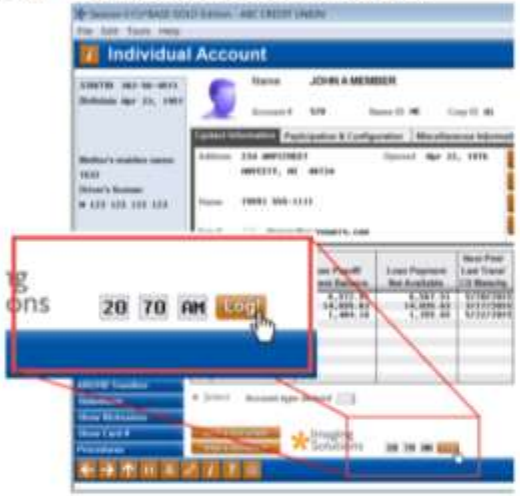
- In the 15.0 release (April)
  - Introduced the Cross Sales Analysis Dashboard (in active beta)
  - Manual calculation of incentive amounts
- In the 15.2 release (October)
  - Configurable Cross Sales incentive amounts
  - Staff can track their own Cross Sales status
  - One-click logging of Cross Sales activity



Teller/Member Service

Log Your Cross-Sales Activity with Just One Click!

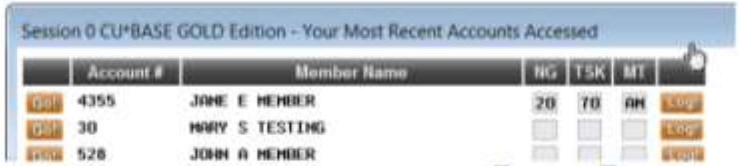
When your tellers or member service representatives talk to a member about one of your cross-sales promos, do they use a scrap pad to jot down a note then log the tasks later after the member leaves? This tool will let them log the work without missing a beat.



Activate the new Cross Sales Shortcuts and an member service representative can enter the Need Group #, Task # and Memo Type codes for a cross-sales task directly onto the Inquiry and Phone Operator main screens.

This is intentionally a no-frills shortcut. There are no lookups for these fields; just type the three codes and click Log! The system will automatically fill in the employee ID, date, and a generic block of text for the Tracker note. You can even log multiple tasks, one after the other, without ever leaving the screen.

We added the shortcut feature to the handy "last 10 accounts used" window, too. Now a single click on Log! selects a recently-used account, or you can log cross-sales activity for one or more of the members you just served.



4 of 19