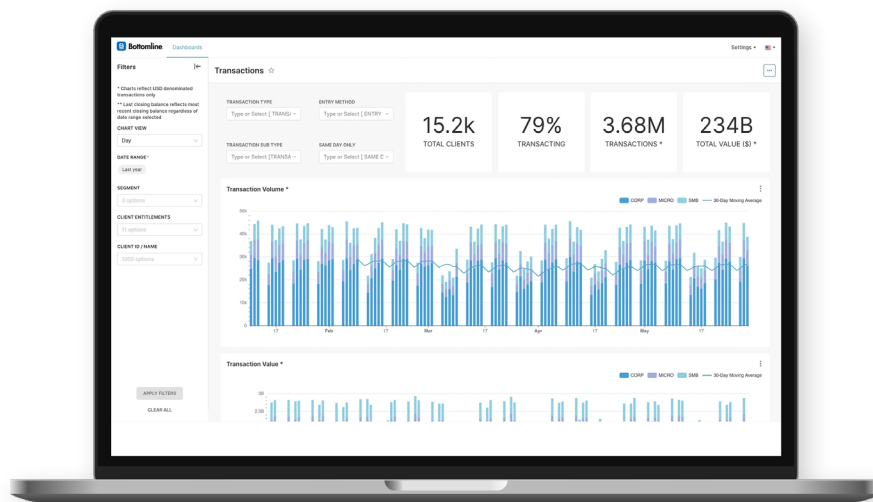




Engagement Optimizer for Commercial Digital Banking and Salesforce Connector

Proactively monitor your business customers'
risk and identify growth opportunities

Whether your bank is managing the migration of new business customers on to the Commercial Digital Banking Platform, helping your bankers identify emerging risks and growth opportunities within individual client relationships, or tracking the impact of digital engagement on overall relationship value over time, Engagement Optimizer provides the timely insight your Treasury team and bankers need to manage their client portfolio more proactively and effectively.



All Engagement Optimizer data and charts may be exported in file formats including Excel documents, delimited text files or .pdf images as appropriate for external manipulation and use.

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Engagement Optimizer

Provides daily updates into key drivers of digital engagement including:

- **Logins**
- **Transactions by type and sub-type (e.g. by SEC code for ACH)**
- **Client reporting access and utilization**
- **New client activation**
- **Migration tracking**
- **Client and user-level entitlements**

Prioritized Watch Lists

Allow your Treasury team to identify and target specific clients that may represent emerging risks or growth opportunities, including:

- **Migrating clients who haven't yet accessed or transacted via the digital platform**
- **Existing clients with large changes in login or transaction activity**
- **Newly-entitled clients who haven't yet utilized the expanded set of payment and treasury services they recently purchased**

Ready to gain more actionable insights?

Contact us today to learn more about Engagement Optimizer for Commercial Digital Banking and the new Salesforce Connector.

Contact Us

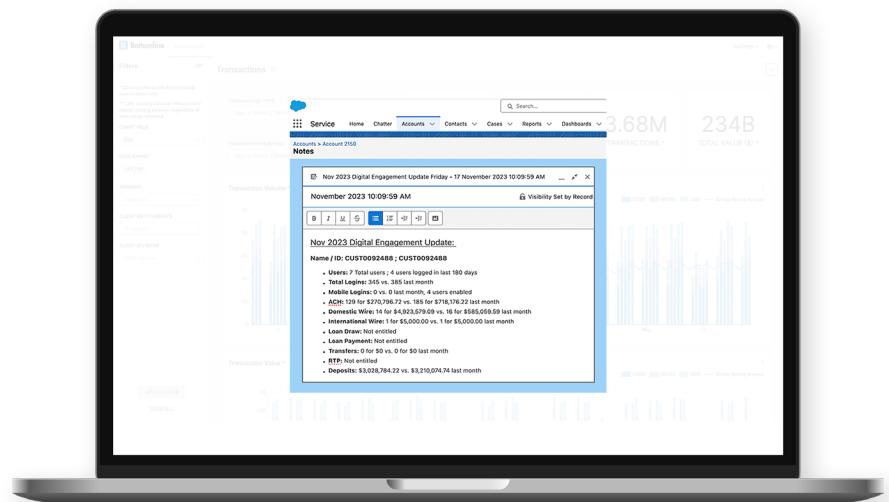
Salesforce Connector

If you have Salesforce and are looking for more ways for your bankers to proactively monitor your business customers' activities, there is now an optional Salesforce Connector for Engagement Optimizer. The Salesforce Connector uses pre-built Salesforce APIs to push actionable digital engagement intelligence to your bank's Salesforce instance, giving your bankers greater control and insight into your business customers' engagement levels.

Automated Insights

Monthly notes are automatically created in Salesforce for all Commercial Digital Banking business customers tracking key customer-level digital engagement trends including:

- **Users**
- **Logins**
- **Mobile use**
- **Changes in digital transaction volumes and deposits**
- **Growth opportunity white space for services not yet entitled**



About Bottomline

Bottomline helps businesses transform the way they pay and get paid. A global leader in business payments and cash management, Bottomline's secure, comprehensive solutions modernize payments for businesses and financial institutions globally. With over 30 years of experience, moving more than \$10 trillion in payments annually, Bottomline is committed to driving impactful results for customers by reimagining business payments and delivering solutions that add to the bottom line. Bottomline is a portfolio company of Thoma Bravo, one of the largest software private equity firms in the world, with more than \$130 billion in assets under management.

For more information, visit www.bottomline.com



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