

# CAA Suite

## Commercial Account Analysis

▶ The Complete Commercial Account  
Analysis and Billing Suite

Office Integrator | Bank RePricing | Exception Handler

Outsource Express | Bank Xtensible Billing | [View 360°](#)

[View 360](#)

# View 360



## Valuable Insight for Account Officers and Senior Management

CAA View 360 gives authorized bank personnel the ability to view account-level information and generate reports. Easily sort data by cash management activity, revenue, product, etc. Account officers and senior management love this!

### CAA View 360 is the browser-based solution allowing a full view of all your customer relationships.

- Immediately spot valuable information on customers, relationships, the bank or the holding company
- Avoid customer conflicts by reviewing changes before they are sent
- Identify customer banking patterns that have changed to optimize opportunities

### The View 360 Modules:

#### Modeling

Successfully acquire new accounts. Empower your calling officers with the one web-based tool they need to show potential customers the value of banking with your institution. Modeling provides pro forma statement models on the fly for prospective clients. Use Modeling with or without CAA to win new clients, or propose new pricing to retain existing clients.

#### Statement Viewing

- Give authorized personnel the ability to view account-level information.
- View statements from any place, any time over the Internet before they are sent.
- Have immediate access to statements (no need to wait for paper statements).
- Access prior-period statements (serves as an electronic archive).

#### Active Views

Actively view customer variances. Several categories of reports are available, with user controls to meet your needs:

- **Account exceptions:** reports for service-price exceptions, permanent/temporary waivers, and recurring fees
- **Account performance:** reports showing variances, monthly profitability, monthly service-level trends, and to identify cross-sell opportunities
- **Current-period operation:** reports for current-period waivers, discounts, and fees due

**CAA View 360** provides critical answers quickly, from every angle to get the big picture. Call for a demonstration to see how CAA View 360 can improve your bottom line!



Call for a demo today: +1.847.735.0577  
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