iPerfo®

Agile. Automated. Empowered.

An AI-Powered Comprehensive Solution for Monitoring and Management of Financial Self-Service ATM Terminals.

Designed and Engineered by

vortex ™
Helping banks reach out

Brief

It offers a comprehensive solution for managing ATMs across multiple vendors; by providing real-time dashboards and monitoring tools of ATM peripherals. It helps financial institutions and independent ATM deployment firms reach their business goals of increased availability, operational efficiency, and customer satisfaction by managing multi-vendor ATM fleets 24/7 with service-level agreement monitoring tools.

All in one, well integrated ATM Management Solution

Secure your ATM fleet through asset and software version control.

Go paperless with digital journal record archives. Ensure regulatory compliance.

Improve uptime by 20% with availability monitoring. Eliminate unwanted downtime.

Monitor performance KPIs in real time with Business Analytics

Optimize cash management and don't let your ATMs dry up

Empower the branch, vendors and service providers with incident management notifications and escalations.

Enabling People & Processes for Efficiency & Effectiveness

Maintain Social Distancing – Monitor and Manage ATMs at your fingertips using Perfo Mobile Application

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Addressing Key Challenges and Problems in running an ATM network

Regulatory

- Strict Central Bank regulations on dispute resolution TAT.
- Creeping penalties against non-compliance.

Cash Optimization

- Lack of centralized visibility of current cash position.
- Lack of cash forecast mechanisms.

Business Revenue

- Lack of business analytics and no clear definition of KPIs.
- Less visibility of revenue leakage.
- Lack of data for capacity planning.

Customer Satisfaction

- Risk of downtime and lesser availability.
- Decrease in customer footfalls.
- Increase in transaction failures.

Systems and Security

- Security risks associated with outdated software and hardware.
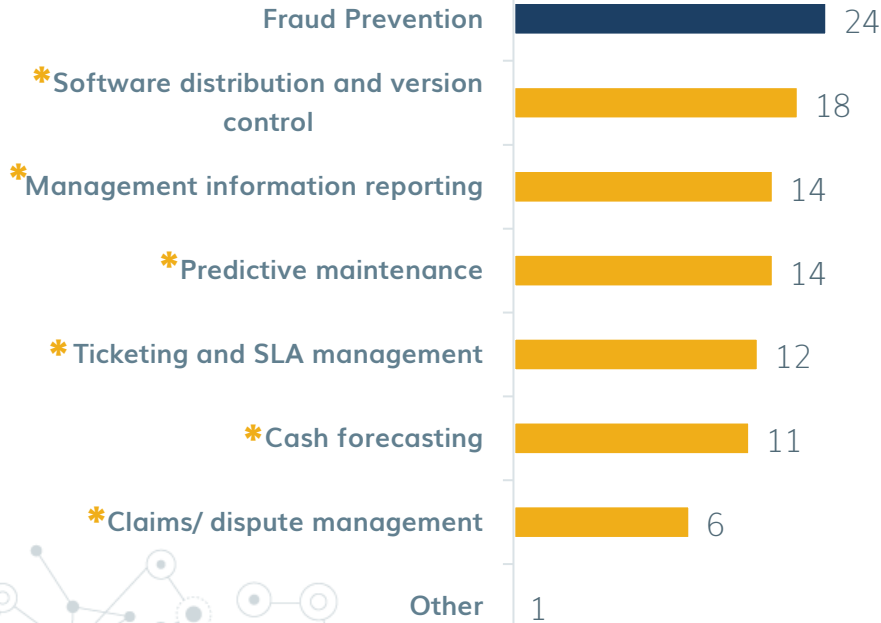- Revenue risk due to malware attacks and fraud attempts.

Staff Empowerment

- Tedious and inefficient collaboration practices between bank, branch and vendors.
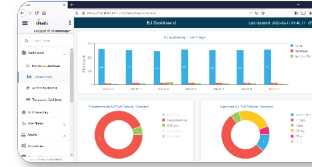- Lack of tools to evaluate vendor performance.

Addressing 6 of 7 needs of Financial Institutions, inline with market expectations

Which one management and monitoring feature will be most important to your bank in the next few years? (In Percentage)

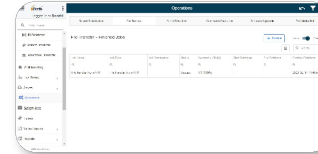Source: Data source: ATM and Self-service Software Trends Report - Published by ATM Marketplace in 2019.

Feature	Value
Fraud Prevention	24
*Software distribution and version control	18
*Management information reporting	14
*Predictive maintenance	14
*Ticketing and SLA management	12
*Cash forecasting	11
*Claims/ dispute management	6
Other	1

Journal Management

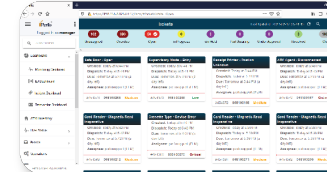**Availability Monitoring**

Content & Patch Management

Analytics

Incident Management

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Unique Value Proposition

Integrated
End to end solution
- Complete rounded solution for ATM self service management
- Modular architecture, product breadth
- PCI-DSS certified

Progress with
Business Analytics
- KPI dashboards and drilldown charts for operations and business teams

Track
SLA and TAT
- Improves uptime and availability
- Measure vendor performance

On the go access through
Mobile Apps
- Mobile notifications/ reminders
- Works on mobile, tablets and desktops

Multi-vendor
Enterprise Solution
- Works on ATMs, Recyclers, Acceptors and Kiosks
- Works with any EFT switch
- Can take feeds from any EFT switch

Measure
Performance
- Granular reports of fleet performance
- Root cause analysis

Built on
Open Source Tech Stack
- Cutting edge technology stack – on premise / cloud
- Most intuitive user interface
- Lowest TCO

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Most Intuitive User Friendly Interface

➢ Uniform navigation, easy to access intuitive screens with relevant data pointers.

➢ Visualized data in the form of charts and status icons.

➢ Dashboards customized for the needs of customer.

➢ Very simple administration with least maintenance.

➢ Standard Dashboards, Pivot Reports and Visually Advanced BI Reports.

➢ Role based Access Control - User sees only the data that is relevant for his role.

➢ Very easy to configure and customize.

➢ Consistent look and feel on Mobile App and Web Application.

➢ Mobile Application provides real time view of channel performance and instant alerts, reminder and escalation notifications.

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Benefits of a complete financial self service terminal management and monitoring solution

BENEFITS CLEARLY OUTWEIGH THE RISKS AND DOWNSIDES

Enables Central Bank Regulatory Compliance related to:

- **TAT on Customer Grievance Redressal:** Our single touch dispute resolution & online EJ viewer capability makes this possible. This also enhances customer satisfaction.
- **Secure Archival:** Archives sensitive transaction journal records in a central repository. Enables lookup in historical transactions.
- **Software Version Control:** Tracking & delivery of latest supported versions of software and patches in ATMS.
- **Security Alerts:** Instant alert on ATM vibration/ safe door opening/ skimmer detection etc., through Mobile app notification.

Facilitates Increase in ATM Transaction Volumes (~10%) & Increase in Customer Satisfaction through:

- **Real-time monitoring:** Mobile app based instant alerts, reminders & notifications to initiate actions to fast-track resolution before transactions are lost.
- **Vendor SLA Management:** Automated ticket assignment and dispatch to vendors & tracking their service levels.
- **Fleet Performance Management:** Business Metrics and Performance Analytics across the network.

Better ROI and Staff Empowerment

- **Empower Branch Manager:** Enables real-time collaboration between branch operation staff and vendors through Mobile app.
- **Cost Efficiency:** Delivers lowest Total Cost of Ownership through open source patronage.

Comparison with EFT Switch based ATM Channel Monitoring Solutions

ONE SINGLE INTEGRATED PLATFORM TO ADDRESS THE 12 KEY NECESSITIES OF ATM CHANNEL MANAGEMENT

Why aren't the top financial institutions content with EFT switch-based ATM monitoring solutions?

EFT Switches are not designed from ground up for ATM Self Service Network Management. EFT Switch's primary business is to route and drive various kinds of transactions and authorize them. It isn't prudent to expect an all round solution from a switch vendor to address your challenges in ATM Channel Operations and Performance Management. The following are a dozen necessities that an EFT Switch does not cater to in an integrated fashion.

1) Integrated Electronic Journal Pulling

2) Integrated Camera Image / Surveillance Video Pulling

3) Targeted region wise advertisement screen distribution

4) Software Patch Distribution and Version Control

5) Uptime Monitoring and Continuous Performance Improvement through historical trend analytics

6) Incident Management and Vendor Performance Management

7) Agent based Monitoring – Always alive continuous monitoring

8) Mobile Apps to enable collaboration between Bank, Branch and Vendors

9) Remote Maintenance, Diagnostics and Resolution Capabilities

10) Cash Forecasting and Cash Load Work Orders

11) Mechanisms of Integration into Reconciliation Tools

12) Facilities and Site Management support

Functionality highlights

Journal Records Management

- EJ Pulling/ EJ Viewer
- Dispute Resolution
- Live EJ Transmission
- Transaction Image Pulling
- DVSS Video Pulling

Availability Monitoring

- XFS based live device monitoring/ Cash monitoring
- Live network dashboards
- Remote reboot/ shutdown
- Device resets
- Live transaction/ device fault analytics.

Business Analytics

- Device performance history/ analytics
- Transaction history
- Alerts
- Reporting/ dashboard engine
- Performance analytics

Cash Management

- Cash level management/ reports
- Cash balancing
- Cash load reports
- Cash forecasting
- Cash reports/ recommendation

Content & Patch Management

- Cash level management/ reports
- Cash balancing
- Cash load reports
- Cash forecasting
- Cash reports/ recommendation

Incident Management

- Tickets/ Assignments
- Escalation rules
- SLA monitoring
- Reminders/ alerts

Key commercial differentiators against competition

Software License is perpetual.
Competitors may only offer term licenses.

DR software license is free of cost.
Competitors may charge at least 50% of license fee for DR.

Unlimited user logins supported.
Competitor products may restrict the number of user logins and may charge you extra for additional user logins.

Software Product based in India created by an ATM OEM with immense field knowledge.
We offers swift implementation and customization at very affordable rates.

Competitor products will additionally cost you database server licenses and application server licenses which straightaway gives at least
30K USD savings on the Total Cost of Ownership when deployed in Single Server mode & 60K USD savings when DC-DR redundancy setup is deployed.

Perfo® software license cost includes all dependent software licenses.

PCI DSS Compliance

Perfo® Security Standards

- PCI DSS Certified
- TLS / SSL Encryption
- User Access Control
- Data Protection

CROSSBOW LABS

CBL.WORLD
EXPLORE@CBL.WORLD

PCI DSS CERTIFICATE

VORTEX ENGINEERING PRIVATE LIMITED

No 6B, 6th Floor, IIT Madras Research Park, No.1. Kanagam Road, Taramani, Chennai, Tamil Nadu

NAME OF SERVICE - PERFO
ENTITY TYPE - SERVICE PROVIDER
TYPE OF SAQ - D, v3.2.1

PCI QSA SIGNATURE
QSA Reference No. 205-260

Testimonials

HEAR WHAT PEOPLE SAY ABOUT OUR SERVICES

PoC and implementation was very quick. Overall performance of the solution is very optimal

Arvind Kumar, Raw Bank-CTO, DR Congo

Perfo software helped us to streamline and automate the data collection process by saving the ATM engineer's time.

**Vincent kiyingi Musoke,
Head of ICT, Pride Microfinance limited, Uganda.**

Support and Development team at Vortex is excellent and skilled enough to address our unique needs

Arifur Rahman, Mutual Trust Bank-TVP, Bangladesh

Vortex completed the implementation on time and the performance of the product is very optimal.

Narendra Deshmukh, EPS-VP Tech, India

Vortex's software support is excellent. Any issue resolution and escalation meets well within our agreed SLAs.

Shamangshu Das, UCO Bank-Chief Manager-IT, India

Our Proud Customers

Perfo® manages 8000+ ATM terminals across continents.
Installed on various brands/models of ATMs – NCR, Diebold, Wincor, Hitachi, Hyosung, GRG and Perto.

10000+
ATM Installations

24x7
Support Services

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Thank you very much for taking the tour.
Hope you had a great time.

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