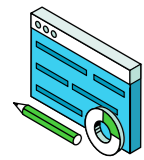


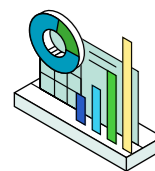
Solution

FIS® Accounting Data as a Service™ provides a business credit score and a holistic view of the SMB's financial health. We also provide detailed cash flow forecasting, while also presenting a comprehensive understanding of opportunities to offer the SMB new products, enhance cross-selling services, and tap into actionable insights.

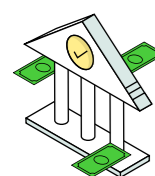
Objective



Provide a business credit score and holistic view of SMBs' financial health to help customers better understand their business and enable bank advisors to provide better financial advice.



Offer robust, normalized data sets to help customers forecast their cash flow and prepare accordingly.



Help SMBs transition to a new bank smoothly and quickly by enabling their new bank to better understand which customers are still making payments to old accounts.

Approach

1

Sandbox Mode

Use Sandbox Mode to observe and understand the reports. Explore our API and test the endpoints and reports that you'll want to surface as part of your application.

2

Develop your Application Logic

Integrate with the decided endpoints to obtain financial statements, ratios, forecasts, and other analytics that can be embedded as part of your application's interface or backend.

3

Onboard your Customers

Onboard customers using Sites™ for a no-code solution or Connect™ for a low-code solution that can seamlessly integrate with your application.

4

Showcase your Customer's Data

Use our Reports and Visualization SDK to present financial charts, objects, and graphs to your customers or use our API to obtain financial statements, ratios, forecasts, and other analytics to help them operate their business more effectively.

Commonly Used Endpoints

GET /accounts

GET /balanceSheets

GET /cashflowStatements

GET /customers

GET /financialForecasts

GET /incomeStatements

GET /journalEntries

GET /reports/railzScore

GET /vendors

Expected Outcomes

Expected outcomes include improved financial health, risk reduction, and better decision-making for SMBs through enhanced financial insights, forecasting, and smoother banking transitions. Improved financial insights can identify areas of cross-sell opportunities for your product, cash flow forecasting can improve liquidity and reduce the risk of cash shortages, and smooth bank transitions can maintain cash flow and avoid disruptions to business, reducing the risk of late payments or missed opportunities.

- Automate manual financial processes
- Access real-time data insights
- Integrate with existing systems
- Handle increasing data and clients for scalability
- Assess and manage risks effectively

