

Problem Solved

445 Merchant Street
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Cards On The Spot Pre-quote Questionnaire Page 1 of 3

Date: _____

Credit Union name: _____

Address: _____

Contact name: _____

Contact phone #: _____

Contact email: _____

(1) New to instant issuance or upgrading current instant issuance platform?

- New
- Upgrade from _____

(2) Types of cards to be instantly issued:

- ATM
- Debit
 - Visa MasterCard Both
- Credit
 - Visa MasterCard Both
- In-house Offline

If Offline, which processor? _____

- Other _____

(3) EMV instant issuance plans

- Credit Timing _____
- Debit Timing _____

(4) Style of cards to be printed?

- Flat card
 - How many card designs? _____

(5) Are PINs validated based on the PIN offset on the magstripe or by the database?

- Magstripe
- Database

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Cards On The Spot Pre-quote Questionnaire Page 2 of 3

(6) How many branches / card printers?

- Branches _____
- Card printers _____

(7) Number of PIN pads needed? _____ (# of estimated end-user workstations)

(8) Proximity of branches to initial install location? (to determine implementation duration)

(9) Card processor interfaces needed:

- CO-OP
 - Credit Debit Both
- Fidelity (FIS)
 - Credit Debit Both
- First Data – Wilmington Platform/Star Northeast
 - Credit Debit Both
- Jack Henry PPS/Pemco
 - Credit Debit Both
- Postillion
 - Credit Debit Both
- Vantiv
 - Credit Debit Both
- Visa DPS
 - Credit Debit Both
- _____
- _____

(10) Offline Credit Card processor:

- Fidelity (FIS)
- PSCU
- Other _____

(11) Other application(s) we need to interface with:

- _____
- _____

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Page 3 of 3

(12) Core system platform:

- CU Prodigy
- Fiserv XP2
- OSI DNA
- Spectrum
- Spectrum ASP
- Symitar - Epysis
- _____

(13) Has this project been budgeted?

- In our budget for _____/_____ (quarter/year)
- Gathering costs for budgeting purposes

(14) Anticipated installation timeframe:

- 1 – 3 months
- 4 – 6 months
- 7 – 12 months
- More than 1 year
- Just shopping