



Redefining the Future

Part 1

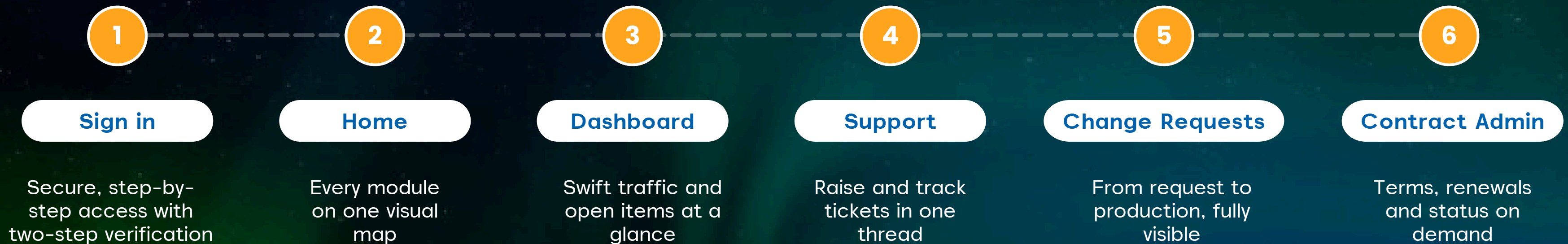
Enhancing Value



THE JOURNEY

A day in the life of an operations user

Meet Sarah, who runs payment operations at a community bank. Here's her day in AxleLink.



One login. One portal. **Every workflow.**



STEP 1 OF 6 · SIGN IN

Secure access, **your way**



Welcome to AxleLink

Ultimate reference point for all your financial data. Ensures consistency throughout your entire data flow.

Email

sarah.lee@demobank.com

Password

Back

Next

[Forgot password?](#)



Two-step authentication

Please confirm your identity by entering the authorization code.

Back



Sign in with Azure or SAML single sign-on, an authenticator app or a password with two-step verification

CHOOSE HOW YOU SIGN IN

SSO

Single Sign-on

TOTP

Authenticator app

2FA

Password + Token



STEP 2 OF 6 • HOME

Everything in one place and
grows along with you



A visual home that maps every module Sarah has access to

01

**One Map of Everything
Axletree**

02

Live or Test, one toggle

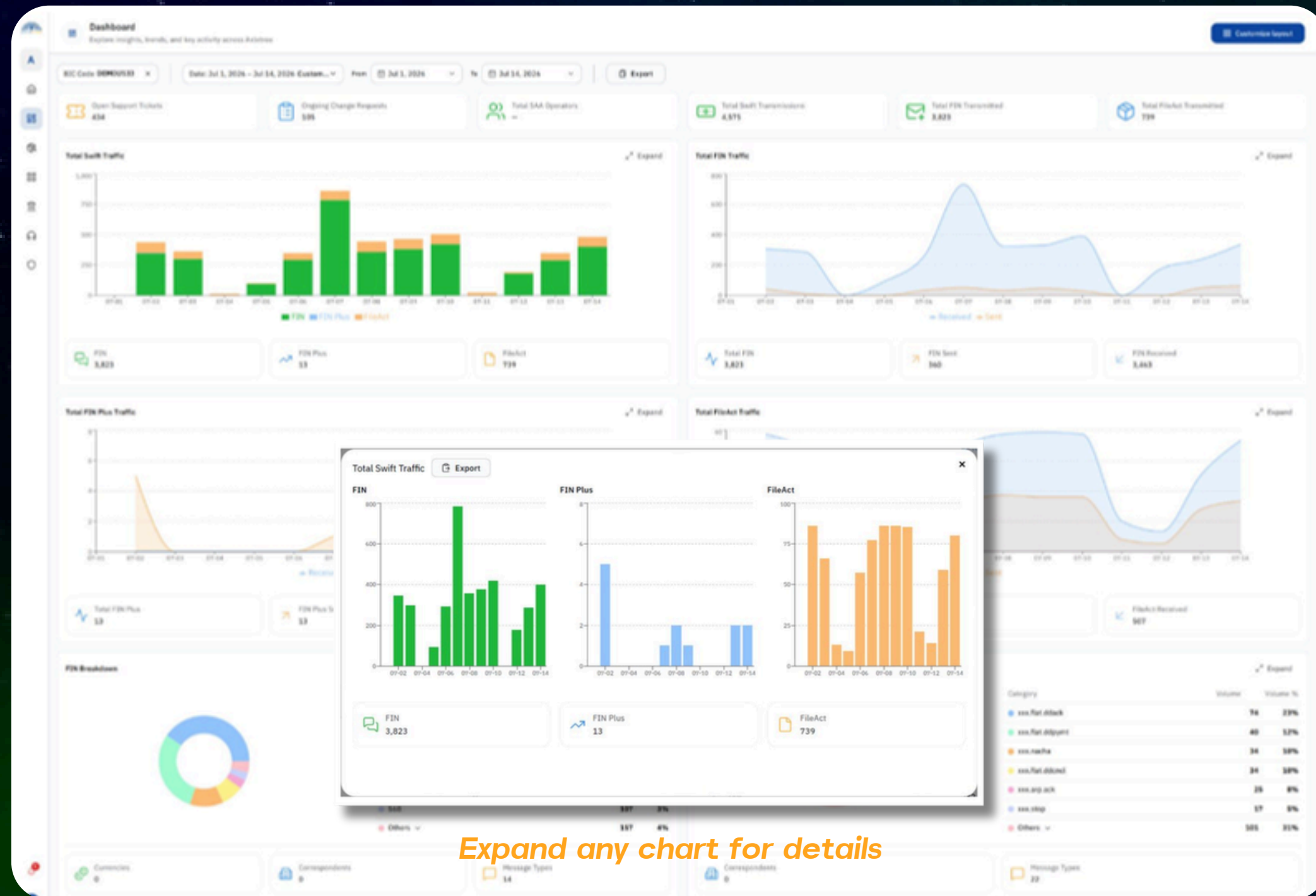
03

Built to Expand



STEP 3 OF 6 • DASHBOARD

All traffic at a glance



01

Daily Briefing in One Place

02

View Sent vs. Received by Rail

03

Drill in, Export, Personalize

Live KPIs and trends for FIN, FIN Plus and FileAct, filtered by BIC and date



STEP 4 OF 6 • SUPPORT TICKETS

Get help without the **email chase**



Support Tickets

Create, track, and manage all your support requests.

Search by subject or ID

Created On Status Priority Requester

Subject/Title	Status	Request ID	Priority	Created Date	Requester	Technician
Outgoing wires stuck in pending Three wires released this morning still show Pending Approval	Open	41509	Critical	08/11/2026 10:00	Megan Caldwell	Kevin Brooks
ACH return report not loading NACHA return report times out for the Aug 10 file	Open	41508	Medium	08/10/2026 09:02	David Okafor	Natalie Chen
Positive Pay exceptions missing Check exceptions not showing in today's decision queue	Open	41507	High	08/07/2026 10:03	Priya Natarajan	Marcus Reed
SSO login loop for DEMO533 Users redirected back to sign-in after completing MFA	Open	41506	High	08/07/2026 10:01	Michael Russo	Kevin Brooks
Internal notes visible to client Private replies appearing in the customer-facing thread	Open	41505	High	08/07/2026 09:58	Jennifer Alvarez	Emily Foster
July statements fail to generate PDF statement download errors on two operating accounts	Closed	41504	Medium	08/07/2026 09:00	David Okafor	Natalie Chen
MXN payment rejected CLABE validation failing on outgoing payment to Mexico	Open	41503	High	08/06/2026 15:18	Lucia Hernandez	Carlos Rivera
Intraday balance mismatch Available balance on the dashboard does not match the core system for our operating acco...	Open	41502	High	08/06/2026 11:14	Thomas Whitaker	Marcus Reed
Bulk payment upload rejected Payment template CSV fails file validation on upload	Closed	41501	Medium	08/06/2026 10:33	Rachel Kim	Emily Foster
RDC check images not attaching Front and back images missing from remote deposit batch	Closed	41500	High	08/06/2026 10:13	Brian Sullivan	Natalie Chen
ACH batch rejected at cutoff Same-day file rejected with invalid batch header record	Open	41499	Critical	08/06/2026 08:35	Angela Moretti	Kevin Brooks
Dual approval not triggering Wires above \$250K are skipping the second approver	Closed	41498	High	08/06/2026 08:31	Megan Caldwell	Marcus Reed
API token creation failing Authorized token request returns 403 for admin user	Closed	41497	High	08/06/2026 08:31	Daniel Park	Carlos Rivera
New user entitlement request Add three treasury users with view-only access	Closed	41496	Medium	08/06/2026 04:56	Samantha Greene	Emily Foster

Viewing 100/585 Tickets

Support Tickets

Ticket #41510

Wire confirmation emails not being received

From: Laura Mitchell <laura.mitchell@demobank.com>
Our wire confirmation emails stopped arriving after 9:00 AM today

View full

From: Laura Mitchell <laura.mitchell@demobank.com> To: support@axlelink.com, david.okafor@demobank.com, laura.mitchell@demo... CC: treasury.ops@demo...
Adding our treasury operations team for visibility -----Original Email----- [Request ID: #RE-41510#]: Wire confirma...

View full

From: Laura Mitchell <laura.mitchell@demobank.com> To: support@axlelink.com, david.o... CC: treasury.ops@demobank.com, kevin.brennan@demobank.com...
Still missing for wires released at 10:30 AM -----Original Email----- [Request ID: #RE-41510#]: Wire confirmation...

View less

From: Laura Mitchell <laura.mitchell@demobank.com>
To: support@axlelink.com
CC: david.okafor@demobank.com, treasury.ops@demobank.com, kevin.brennan@demobank.com
Please let us know if you need the wire reference numbers.
Sent from Axlelink by Laura Mitchell (laura.mitchell@demobank.com) at 08/13/2026 20:13

Ticket Details

Requester
Laura Mitchell

Request ID
41510

Raised On
08/13/2026 10:14

Last Updated
08/13/2026 10:43

Status
Open

Priority
High

Every request, every reply and every status in one place

01

Create, Respond, Track & Close

02

Visible Conversation Threads

03

Manage Ticket Priority



STEP 5 OF 6 · CHANGE REQUESTS

Change Management **Simplified**



Change Requests

Track and Manage your Change Requests

Search change requests

Reset Filters

Account1

Stage

CID	Title	Change Owner	Change Manager	Stage	UAT Date	Production Date	Change Requester
2237	DEMOUS21: Wire limit configuration update	Daniel Reyes	Karen Whitfield	UAT Ready >	08/18/2025	-	Laura Mitchell
2143	DEMOUS21: OFAC sanctions list refresh	Hannah Brooks	Karen Whitfield	Close	09/22/2025	10/01/2025	David Okafor
2131	DEMOUS21: ISO 20022 MX message migration	Omar Siddiqui	Karen Whitfield	Planning	-	-	Laura Mitchell
2098	DEMOUS21: SWIFT gateway bandwidth increase	Karen Whitfield	Karen Whitfield	Close	07/14/2025	07/21/2025	Thomas Whitaker
2090	DEMOUS21: Provision 2 additional SWIFT gpi users	Raj Mehta	Karen Whitfield	Close	06/23/2025	06/30/2025	Priya Natarajan
2087	DEMOUS21: Issue 5 additional hardware tokens	Raj Mehta	Steven Cho	Close	06/09/2025	06/16/2025	Priya Natarajan
2033	DEMOUS21: Sanctions screening case lookback (SOW)	Hannah Brooks	Karen Whitfield	Close	-	04/28/2025	David Okafor
1896	DEMOUS21: Refresh UAT environment from production	Lisa Turner	Lisa Turner	Close	02/10/2025	-	Thomas Whitaker
1877	DEMOUS21: ISO 20022 readiness assessment	Omar Siddiqui	Steven Cho	Close	01/30/2025	01/27/2025	Laura Mitchell
1874	DEMOUS21: Annual service contract renewal	Daniel Reyes	Karen Whitfield	Close	-	01/06/2025	Laura Mitchell

Viewing 10/36 Requests

10<123>X

01

Always know the stage

Every change request shows exactly where it stands.

02

Clear Change ownership

See the owner, manager and requester.

03

Dates you can plan around

Deployment dates tracked for every change. No surprises!

Owners, Stages, UAT and Production dates, all in one view



STEP 6 OF 6 • CONTRACTS

Contracts, always **at hand**



Contracts

Create, edit, and manage contracts for your organization.

Search

Accounts

Type

Status

Export

Name	CID	Account Name	Created Date	Type	Term (Months)	Start Date	End Date	Status	Auto Renewal	
Service Bureau Agreement	100482	Demo Bank	Jun 19, 2025	Service Bureau	36	Jul 01, 2025	Jul 01, 2028	ActiveAndRenewed	Yes	
Swift CSP Assessment 2026	100482	Demo Bank	Jan 12, 2026	Swift CSP	12	Feb 01, 2026	Feb 01, 2027	Complete	No	
ISO 20022 Migration SOW	100517	Sample CU	Mar 03, 2026	Professional Services	6	Apr 01, 2026	Oct 01, 2026	Complete	No	
Swift CSP Assessment 2024	100517	Sample CU	Jan 08, 2024	Swift CSP	12	Feb 01, 2024	Feb 01, 2025	Expired	No	
Sanctions Lookback SOW	100630	Example Bank	Sep 15, 2023	Professional Services	4	Oct 01, 2023	Feb 01, 2024	Cancelled	No	

Viewing 5/5 Contracts

101<<1>>>

- 01One Click Renewals
- 02Every agreement in one list
- 03Never miss a Renewal

Terms, renewals and status for every agreement



Managing Audits **Simplified**



Dashboard

Monitor and Manage your Assessments

+ Create a new Assessment

Date

Account

Export

Active Assessment

508

Delayed Assessment

354

Completed Assessment

70

Active Assessments

508

Assessment Name	Account Name	Framework	Type	Domain Name	Status	Due Date	Last Updated
1110_Architecture A1 (M) Delta v2024	1110	Architecture A1 (M) Delta v2024	Delta	CSP	Active Scope Assign 5/24 Answer 1/24 Draft Final Close	Oct 10, 2024	Oct 01, 2024 15:38
1110_Architecture A1 (M) Delta v2024	1110	Architecture A1 (M) Delta v2024	Delta	CSP	Active Scope Assign 5/24 Answer 5/24 Draft Final Close	Oct 10, 2024	Sep 29, 2024 15:58
1110_Architecture A1 (M) Delta v2024	1110	Architecture A1 (M) Delta v2024	Delta	CSP	Active Scope Assign 5/24 Answer 5/24 Draft Final Close	Oct 31, 2024	Sep 30, 2024 17:56

View all

Completed Assessments

70

Assessment Name	Account Name	Framework	Type	Domain Name	Status	Lead Assessor	Other Assessors	Closing Date
Assessment_1110_1	1110	3646	Delta	CSP	Deactivated	J. Rivera	A. Patel	Feb 05, 2024
Assessment_1110_2	1110	Architecture A2 v2024	Full	CSP	Deactivated	J. Rivera	A. Patel, M. Chen, +1 more	Feb 05, 2024
Assessment_1120_1	1120	Architecture B1 v2024	Other	CSP	Deactivated	M. Chen	S. Ghore	Nov 26, 2024

View all

01

Status at a glance

02

Progress you can follow

03

Initiate your Assessment with one click



What this means for you

1

Secure by design

Two-step verification and additional authentication methods protect every login.

2

Self-service

Tickets, changes, contracts and assessments, with no email chase and no waiting on a call back.

3

Full visibility

To all your relationship touch points with Axletree, Users and Applications, all on one screen.

4

One portal

One login for every Axletree service, with new modules added as they launch.



One login · One portal · Every workflow



Share your ideas!

What would make your team's day easier?