

Customer Service: Third Party Account Access Workflow [BPMN 2.0] Access Setup Once profile is ↓ If caller comes through System X, ↓ Specialist's System Specialist chooses correct profile in System Y to bring up profile record of the Customer desires to add non-owner access (i.e. Financial Advisor, -Specialist inquires as to reason for call, gathers information specified, Specialist checks to see if this contact is an Y screen shows profile options family member, etc. authorized signer on the account from caller caller on the phone to their accounts



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