

Jack Henry & Associates

# NetTeller Demo Administration

User Guide

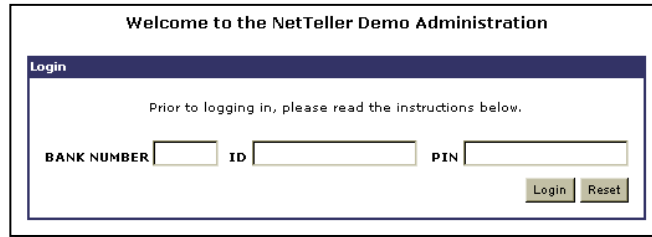
# Demo Administration

## I. Overview

Demo administration allows you to have control over many features in the demo. After logging in and setting up who has access to administration, you will proceed to “customize” the demo for your institution. Step 1 – *Setup Demo Options* allows you to control the overall organization of the demo, while Step 2 – *Edit Demo Pages* allows you to edit the specific details of each page you elect to display in the demo.

## II. Log in to the NetTeller Demo Administration Site

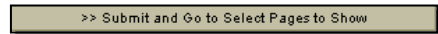
<https://demo.netteller.com/demoadmin>



**Bank Number** – 4-digit NetTeller ID Prefix  
**ID** – Your assigned User ID  
**PIN** – Your assigned PIN

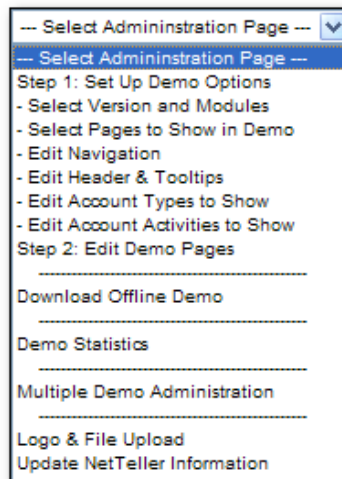
### A. First Time Demo Administration Users

For the initial set up of the demo, please complete each page and advance to the following page using the



button found in the lower right of each window.

### B. Returning Users for Editing Purposes



If you need to make changes to your demo after your initial set up, please feel free to use the navigation window in the upper right to go directly to the section/page you wish to edit. Submit all changes you make with the submit button in the lower right of each window.

### III. Setting Up Demo Admin Users

You can add demo admin users by clicking on the **EDIT USERS** link in the upper right corner.

#### A. Current Users

You can view current Demo Admin users, as well as update User information. If a User is locked, change the password to unlock the account. After completing the changes, click the **Add/Update Users** button in the lower right corner.

**Add Users**

**Instructions: (All fields are required.)**

1. Type in the first name, last name, id and password.
2. Make sure the user name is not already in use.
3. Click the Add/Update User button.

First Name	Last Name	ID	Password
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### B. Add New Users

To add new users fill in the required fields. Enter the first and last name of the new user, as well as the ID & Password. Click the **Add/Update Users** button to accept the addition.

**Current Users**

**Instructions: (All fields are required.)**

1. To update current user information type the new information over the current information.
2. If a user's account is locked\*, change their password.
3. After completing your changes, click the "Add/Update User" button below.

*\* An account will be locked after a user has 3 failed log in attempts.*

First Name	Last Name	ID	Password	Account Locked	Delete
bob	bob	bob	*****	No	<input type="checkbox"/> View Log
jane	jane	jane	*****	No	<input type="checkbox"/> View Log

# STEP 1: Setup Demo Options

## I. Select the Products/Modules and NetTeller Version

Choose the products that your customers will see when viewing the demo.

### A. Demo Description

The name of the demo you are currently working with. This name should be descriptive so that you can easily differentiate one demo from another.

### B. Select Demo Version

Select the NetTeller Version you want shown in the demo. You may choose to display any version (2007 and greater) regardless of the version you are currently using. Versions available are 2007, 2008 and 2009.

### A. Select Modules

Click the box to next to the products you want shown in the demo. E-Statements (ES or ESI) and Mobile Banking are only available in versions 2008 and 2009.

Demo Description	
<input type="text" value="Master 2009 Demo"/>	

Select Demo Version		
Show	Version	General Availability Date
<input type="radio"/>	2007	3/1/2007
<input type="radio"/>	2008	3/16/2008
<input checked="" type="radio"/>	2009	3/15/2009

Select Modules	
<input checked="" type="checkbox"/> NetTeller	<input checked="" type="checkbox"/> Show check imaging in the Demo
<input checked="" type="checkbox"/> Bill Pay	<input checked="" type="radio"/> NetTeller BillPay <input type="radio"/> Metavante
<input checked="" type="checkbox"/> Cash Manager	
<input checked="" type="checkbox"/> E-Statements	
<input checked="" type="checkbox"/> Options	
<input checked="" type="checkbox"/> Mobile Banking	

## II. Select Pages to Show


- Select the pages you would like to display for each module selected on the previous page. Click on the page title to view a preview of the screen's content.
- Be sure to select pages for all modules. Expand module sections by clicking on the arrow or the module name.
- Quickly select all pages in a category by clicking the "Check All" option. Be sure to review the selections, as you wouldn't want to show all pages in some sections. Example: Showing all pages related to Login would show the process with and without Watermark. Select just the pages used by your FI.
- Re-order the pages if necessary by clicking Move next to the page you want to move. All other buttons change to Move Here. Click the appropriate Move Here button to drop the page in the desired location.
- Pages not selected will fall to the end of the list when selections are saved.

▶ Pages Only in Demo	
▼ Main	
<a href="#">(Check All)</a>   <a href="#">Uncheck All()</a>	
1 <input checked="" type="checkbox"/> Login	<input type="button" value="Move"/>
2 <input checked="" type="checkbox"/> Reset Password	<input type="button" value="Move"/>
3 <input checked="" type="checkbox"/> Cash Management Login	<input type="button" value="Move"/>
4 <input checked="" type="checkbox"/> Multifactor Premium Login Step 1	<input type="button" value="Move"/>
5 <input checked="" type="checkbox"/> Multifactor Premium Login Step 2	<input type="button" value="Move"/>
6 <input checked="" type="checkbox"/> Account Listing	<input type="button" value="Move"/>
7 <input checked="" type="checkbox"/> Retail Account Details	<input type="button" value="Move"/>
8 <input checked="" type="checkbox"/> Current Transactions	<input type="button" value="Move"/>
9 <input checked="" type="checkbox"/> Check Image	<input type="button" value="Move"/>
10 <input checked="" type="checkbox"/> View Deposit Sets	<input type="button" value="Move"/>
11 <input checked="" type="checkbox"/> Download Transactions	<input type="button" value="Move"/>
12 <input checked="" type="checkbox"/> Stop Payment Entry	<input type="button" value="Move"/>
13 <input checked="" type="checkbox"/> Stop Payment Confirmation	<input type="button" value="Move"/>
14 <input checked="" type="checkbox"/> Transfer List	<input type="button" value="Move"/>
15 <input checked="" type="checkbox"/> New Transfer	<input type="button" value="Move"/>
16 <input checked="" type="checkbox"/> Funds Transfer Confirmation	<input type="button" value="Move"/>
17 <input checked="" type="checkbox"/> View Statement/Notice List	<input type="button" value="Move"/>
18 <input checked="" type="checkbox"/> View Statement/Notice	<input type="button" value="Move"/>
19 <input checked="" type="checkbox"/> Interbank Transfer - Add Account	<input type="button" value="Move"/>
20 <input checked="" type="checkbox"/> Interbank Transfer - Enrolled Accounts	<input type="button" value="Move"/>
21 <input checked="" type="checkbox"/> Interbank Transfer - Set Up New	<input type="button" value="Move"/>
22 <input checked="" type="checkbox"/> Interbank Transfer - Pending	<input type="button" value="Move"/>
23 <input checked="" type="checkbox"/> Interbank Transfer - History	<input type="button" value="Move"/>
24 <input checked="" type="checkbox"/> Message Center - Messages	<input type="button" value="Move"/>
25 <input checked="" type="checkbox"/> Message Center - Send Message	<input type="button" value="Move"/>
26 <input checked="" type="checkbox"/> Message Center - View Message	<input type="button" value="Move"/>
27 <input type="checkbox"/> Intro Page	<input type="button" value="Move"/>
28 <input type="checkbox"/> Multifactor Information	<input type="button" value="Move"/>
29 <input type="checkbox"/> ESI	<input type="button" value="Move"/>
▶ Bill Pay	
▶ Cash Manager	
▶ ES	
▶ Options	
▶ Mobile Banking	

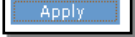


### III. Edit Navigation Graphics

Choose where the “apply”, “exit demo” and “email” buttons will take the viewer. Select the exact colors of the navigation buttons. These buttons appear on every page of the demo.

#### A. Choose Button Colors

Either type in the exact hexadecimal value for the button’s color or use the  to choose from a browser-safe color palette.

#### B. Link

Type the URL and browser target where you would like the demo viewer directed when they click  or . When using the  you may also choose to close the browser window completely.

#### C. Target

Indicate whether you want the specified URL to open in the current browser window, or a new browser window.











#### D. E-Mail

Enter the e-mail address to which the customer’s email will be sent. Enter any disclaimer information that you want to display to the customer before they compose their e-mail (e-mail not secure, don’t send account info, etc).


#### E. Show?

Check the Show? box if you want the ,  or  buttons to be available to the demo viewer.

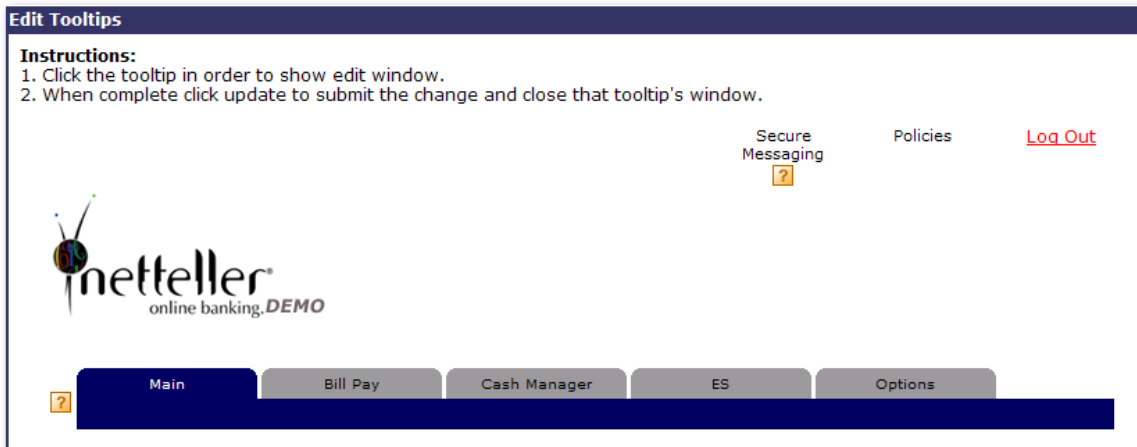
#### F. Select Color Scheme for Demo Navigation Buttons

Indicate Button Links and Show/Hide			
Button	Link (type full URL including http:// or https://)	Target	Show?
Apply	<input type="text"/>	-- Select Target --	<input type="checkbox"/>
Button Color	000000 		
Text Color	FFFFFF 		
Exit Demo	www.twbusa.com	This Browser Window	<input checked="" type="checkbox"/>
<b>If Close Browser Window is selected, the exit button will only be displayed in Microsoft® Internet Explorer.</b>			
Button Color	990000 		
Text Color	FFFFFF 		
E-mail	https://www.banksafe.com/twbusa/apps/c		<input checked="" type="checkbox"/>
Button Color	990000 		
Text Color	FFFFFF 		
E-mail Disclaimer			
<input type="text"/>			
< Previous			
Button Color	990000 		
Text Color	FFFFFF 		
Next >			
Button Color	990000 		
Text Color	FFFFFF 		

### III. Edit Header & Tooltips

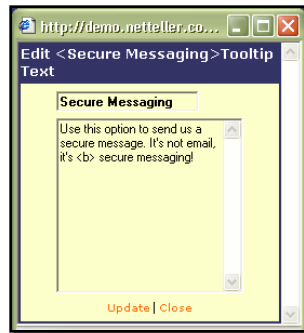
You can customize the text that will display when the customer rolls over the tooltip buttons. 

If you leave the tooltip blank, then the tooltip will not display in the demo.



#### A. Editing Tooltips

Click the tooltip you want to edit. Enter your text and click Update to accept the changes and return to the Edit Tooltips page. If you do not want to make any changes, click Close. Follow these steps for each tooltip you want to edit.



## B. Select to Show for Each Module in Product Header

Select the items that will display in the sub-menus as shown in the Edit Tooltips screen. Selecting these options will *only* affect the display of the sub-menus. To edit which pages will display to the demo viewer, go to Step 3: Select Pages to Show.

**Edit Headers**  
**Main**  

<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Transactions	<input checked="" type="checkbox"/> Transfers	<input checked="" type="checkbox"/> Stop Payments	<input checked="" type="checkbox"/> Statements	<input checked="" type="checkbox"/> FI Transfers
<input checked="" type="checkbox"/> Accounts	<input checked="" type="checkbox"/> Current Transactions	<input checked="" type="checkbox"/> New	<input checked="" type="checkbox"/> New		<input checked="" type="checkbox"/> New Transfers
<input checked="" type="checkbox"/> Order Checks	<input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> Scheduled	<input checked="" type="checkbox"/> Current		<input checked="" type="checkbox"/> Enrolled Accounts
<input checked="" type="checkbox"/> Interest Rates	<input checked="" type="checkbox"/> Search	<input checked="" type="checkbox"/> History			<input checked="" type="checkbox"/> Add Account
<input checked="" type="checkbox"/> Account Info					<input checked="" type="checkbox"/> Pending Transfers
					<input checked="" type="checkbox"/> Transfer History

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**Bill Pay**  

<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Payment	<input checked="" type="checkbox"/> Payees	<input checked="" type="checkbox"/> Add Payee
<input checked="" type="checkbox"/> Scheduled Payments	<input checked="" type="checkbox"/> Quick Payment		<input checked="" type="checkbox"/> Pay a Company
<input checked="" type="checkbox"/> History	<input checked="" type="checkbox"/> Add Payment		<input checked="" type="checkbox"/> Pay an Individual
<input checked="" type="checkbox"/> Add Account	<input type="checkbox"/> Expedited Payments		

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**Cash Manager**  

<input checked="" type="checkbox"/> ACH	<input checked="" type="checkbox"/> Wires	<input type="checkbox"/> ARP	<input checked="" type="checkbox"/> Users	<input checked="" type="checkbox"/> Reporting	<input checked="" type="checkbox"/> File Status
<input checked="" type="checkbox"/> Batch List	<input checked="" type="checkbox"/> Transmit Wires	<input type="checkbox"/> Items	<input checked="" type="checkbox"/> CM User List	<input checked="" type="checkbox"/> Prior Day	
<input checked="" type="checkbox"/> Upload	<input checked="" type="checkbox"/> Edit/Add	<input type="checkbox"/> Download	<input checked="" type="checkbox"/> New CM User	<input checked="" type="checkbox"/> Current Day	
<input checked="" type="checkbox"/> Tax Payment	<input checked="" type="checkbox"/> Transmit Templates	<input type="checkbox"/> Upload		<input checked="" type="checkbox"/> Position	

## IV. Select Account Types

Choose which account types will display to the demo user. Checking is a default account that must show in the demo.

Account	Balance	Status	
Checking	\$71.66		Select Activity ...
Savings	\$506.00		Select Activity ...
IRA	\$2,000.00		Select Activity ...
CD	\$1,500.00		Select Activity ...
Home Equity	\$1,376.16		Select Activity ...
Mortgage Loan	\$4,795.00		Select Activity ...
Installment Loan	\$3,000.00		Select Activity ...
Line of Credit	\$4,795.00	Dermant	Select Activity ...

## V. Select Activities to Show for Each Account Type

Customize the activities that will show in the drop-down menu for each account type.

### A. View Account Activities

Open the drop-down menus to determine which activities are currently selected. To make changes, click **Edit** next to the account type.

Account	Balance	Status	Activity	Edit
Checking	\$71.66		Transactions	Edit
Savings	\$506.00		Transactions	Edit
Home Equity	\$1,376.16		Transactions	Edit
Mortgage Loan	\$4,795.00		Transactions	Edit

### B. Edit Options for Account Types

Place a checkmark in the box next to the activity you want to show. Click update at the bottom of the Edit Window. Complete these steps for each account type you want to edit.

**Edit Options for Checking**

Activities Showing

To stop showing an account:

- Uncheck the checkbox for that account.
- Click "Update" at the bottom of the page.

- Transactions
- Download
- Statements
- Stop Payments
- Transfers
- NSF Items
- Prior Day
- Account Info
- Current Day

Update | Close

You are now ready to view and edit the demo pages. Click [>> Go to Demo Start Page](#) to view the demo with the options you selected and edit the demo screen text.

## Step 2: Edit Demo Pages

### I. Demo Start and End Pages

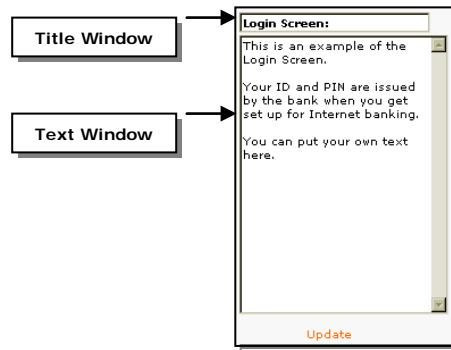
Each demo contains an optional Start page that will be displayed prior to any other pages in the demo, and an End page that will display after all of the pages have been viewed. You have the ability to type content for both of these pages.

To add content to these pages, simply type the text in the large text box in the middle of the page and click the 'Update' link. You may use HTML in the text areas.

### II. Editing Text Boxes

The left-hand side of each demo page contains a text box that allows you to create a title and general description of the page you are viewing. The title window text becomes the name of the page. Page names are viewable in the drop-down menu for navigation.

To add content to the text boxes, simply add text to the title window and the text window, and then click 'Update'.



Click the  button in lower right corner to continue to the next page, or navigate directly to the page you want to edit by clicking the page number for the product.

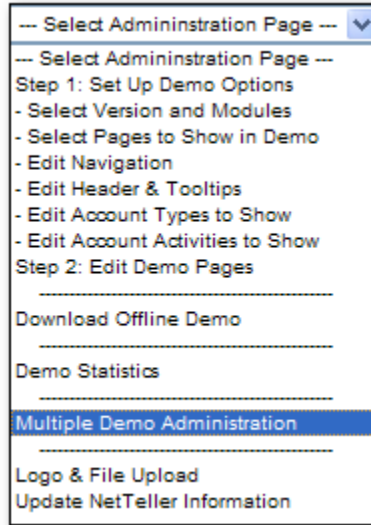
### III. Editing Tooltips for Demo Pages

Most pages you choose to display in the demo contain Tooltips that you can edit. These Tooltips allow you to explain the functionality of the selected feature. If you do not want to add a tooltip to a feature, simply leave the contents of the tooltip blank. The question mark will still display in administration in case you decide to add the tooltip at a later time, however the tooltip will not be visible to users viewing the actual demo.

## Adding Additional Demos

You can easily set up different demos with varying content in order to target specific customers. Each of these additional demos will have a unique URL.

In the upper right corner of the logon page, select **Multiple Demo Administration** from the drop-down menu.



Each demo you create will be listed.

### A. Description

The descriptive name assigned to the demo. This name does not display to the viewer.

### B. Alias

By default, this is the sequence number of the demo. If you want to make the demo URL a "friendly" URL vs. a sequence number, enter the new Alias.

**Demo URL:** To display the demo on your website, enter the URL per the following format:

http://demo.netteller.com/<bankfoldername>/<alias>

Bank Folder Name = the FI specific part of your NetTeller URL.

### C. Default Demo

This field lets you specify a default demo to display when an alias doesn't match the url provided. If you do not select a default demo, users will see a blank screen with urls that don't match aliases.

Existing Demos				
Description	Alias	Default Demo	Delete	Overwrite This Demo
Master 2008 Demo	1	<input checked="" type="radio"/>	<input type="checkbox"/>	With... <span>▼</span>
Bill Pay Only	3	<input type="radio"/>	<input type="checkbox"/>	With... <span>▼</span>
CM 2008 Demo	4	<input type="radio"/>	<input type="checkbox"/>	With... <span>▼</span>
Master 2009 Demo	2009	<input type="radio"/>	<input type="checkbox"/>	With... <span>▼</span>

### D. Delete

Place a checkmark in the box next to the Demo you want to delete. Click Update Demos in the lower right corner to delete the demo. Deleted demos cannot be retrieved.

### E. Overwrite This Demo

If you want to permanently change the contents of one demo to reflect another you can overwrite an existing demo. Choose the demo with which to overwrite and click Update Demos in the lower right corner to complete the changes.

### F. Create A New Demo

Use this option to create a brand new demo or to duplicate an existing demo. Enter the Demo Description and Alias, then choose the Demo Type from the drop-down menu. Options are New Blank Demo or a copy of an existing demo. Click Update Demo to save changes.

Create A New Demo		
Description	Alias	Demo Type
<input type="text"/>	<input type="text"/>	Create... 

## Demo Statistics

Date Selection		
Quick Select <input type="text"/>		
Start Date <input type="text" value="03/17/2009"/>	Stop Date <input type="text" value="03/17/2009"/>	
Statistics to Display		
<a href="#">Select All</a>   <a href="#">Deselect All</a>		
<input type="checkbox"/> Unique Visits	<input type="checkbox"/> Page Views	<input type="checkbox"/> Referrers
Demos to Display		
<a href="#">Select All</a>   <a href="#">Deselect All</a>		
<input type="checkbox"/> #1 - Master 2008 Demo	<input type="checkbox"/> #2 - Bill Pay Only	
<input type="checkbox"/> #3 - CM 2008 Demo	<input type="checkbox"/> #4 - Master 2009 Demo	
<input type="button" value="View Statistics"/>		

### A. Date Selection

Enter the Start and Stop dates for the demo statistics.

### B. Statistics to Display

Choose from Unique Visits, Page Views or Referrers. Select All or Deselect All links are available for use.

### C. Demos to Display

Select one or more demos for which to view statistics. Select All or Deselect All links are available for use.

Once all selections are made, click View Statistics.

## Logo & File Upload

FIs are responsible for uploading their own logos for the Demo. Logos can be uploaded for the main demo and for the Mobile Banking portion of the demo.


A sample Electronic Statement (for ESI) can also be uploaded.

NOTE: Only one logo/sample statement may be uploaded per Financial Institution. You cannot have different logos for each instance of the demo.

Browse for the appropriate file and click Upload in the lower right corner.

**Main Logo**

Existing Image:



New Main Logo:

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**Mobile Banking Logo**

New Mobile Logo:

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**E-Statement Sample**

New Sample Statement PDF:

## IV. Update NetTeller Information

Colors, Menu Names and Product Names pull from FI Management into the Demo. Changes to FI Management are pulled in to the Demo once daily. To force changes made in FI Management to reflect in the demo, select Update NetTeller Information. This option can be taken once every two hours.