

My NetTeller Setup Instructions

User Functionality

Initially, the user must actively navigate to the *My NetTeller* or *Payment Center* options. The user can then select to make one of the pages the new landing page.

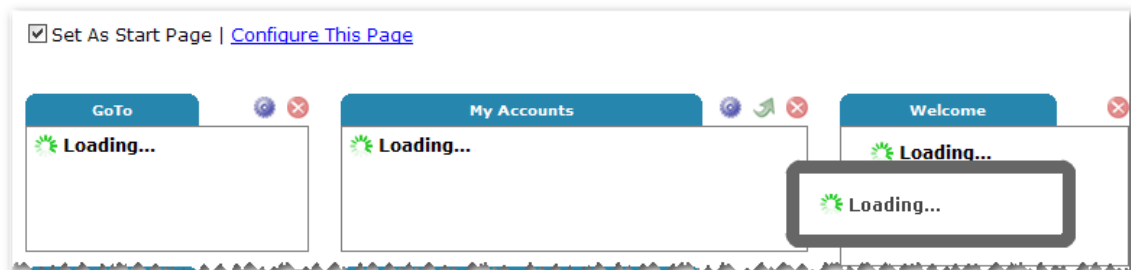
The *My NetTeller* option is accessible within the main navigation bar upon initial login, and appears just to the left of the Account Listing option. It is also accessible from any other main option (e.g. Transfers, Transactions, Stop Payments) under the main tab.



The *Payment Center* option is found under the Bill Payment tab and is accessible from any option within the Bill Pay tab. It is the default landing page for options in the Bill Payment tab.

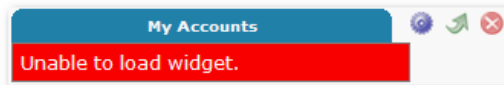


Upon visiting either *My NetTeller* or *Payment Center*, each widget individually loads while the overall page loads:



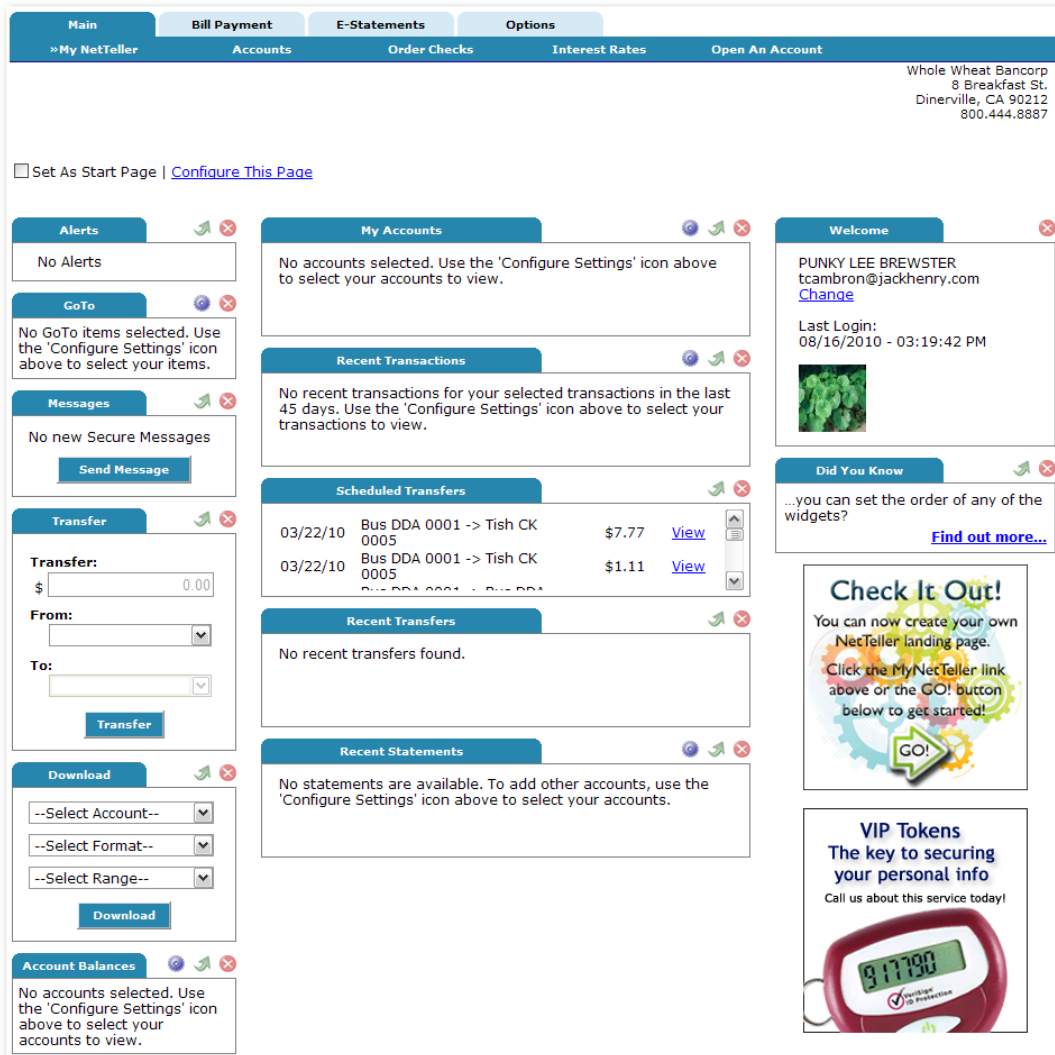
Widgets at the top of the page will load before widgets at the bottom. During the loading time, each widget is pulling data from a separate record, based on its function. Once all widgets have loaded, the overall page “Loading...” gray indicator box will disappear.

If a widget cannot load for some reason, a message will display within the widget saying “Unable to load widget”.



My NetTeller Initial View

Upon navigating to the *My NetTeller* option, the user will see Marketing Ads*, default widgets** and page configuration options:



The screenshot displays the My NetTeller interface with the following components:

- Navigation Bar:** Main, Bill Payment, E-Statements, Options. Sub-navigation: My NetTeller, Accounts, Order Checks, Interest Rates, Open An Account.
- Header:** Whole Wheat Bancorp, 8 Breakfast St., Dinerville, CA 90212, 800.444.8887.
- Configuration:** Set As Start Page | [Configure This Page](#)
- Alerts:** No Alerts.
- GoTo:** No GoTo items selected. Use the 'Configure Settings' icon above to select your items.
- Messages:** No new Secure Messages. [Send Message](#)
- Transfer:** Transfer form with fields for Amount (\$0.00), From, and To. [Transfer](#)
- Download:** Download form with dropdowns for Account, Format, and Range. [Download](#)
- Account Balances:** No accounts selected. Use the 'Configure Settings' icon above to select your accounts to view.
- My Accounts:** No accounts selected. Use the 'Configure Settings' icon above to select your accounts to view.
- Recent Transactions:** No recent transactions for your selected transactions in the last 45 days. Use the 'Configure Settings' icon above to select your transactions to view.
- Scheduled Transfers:**

03/22/10	Bus DDA 0001 -> Tish CK 0005	\$7.77	View
03/22/10	Bus DDA 0001 -> Tish CK 0005	\$1.11	View
- Recent Transfers:** No recent transfers found.
- Recent Statements:** No statements are available. To add other accounts, use the 'Configure Settings' icon above to select your accounts.
- Welcome:** PUNKY LEE BREWSTER, tcambrom@jackhenry.com, [Change](#), Last Login: 08/16/2010 - 03:19:42 PM.
- Did You Know:** ...you can set the order of any of the widgets? [Find out more...](#)
- Check It Out!:** You can now create your own NetTeller landing page. Click the MyNetTeller link above or the GO! button below to get started! [GO!](#)
- VIP Tokens:** The key to securing your personal info. Call us about this service today!

Configurable widgets will show a default message indicating the user should use the 'Configure Settings' icon. Once the user initially configures the widget, data will populate.

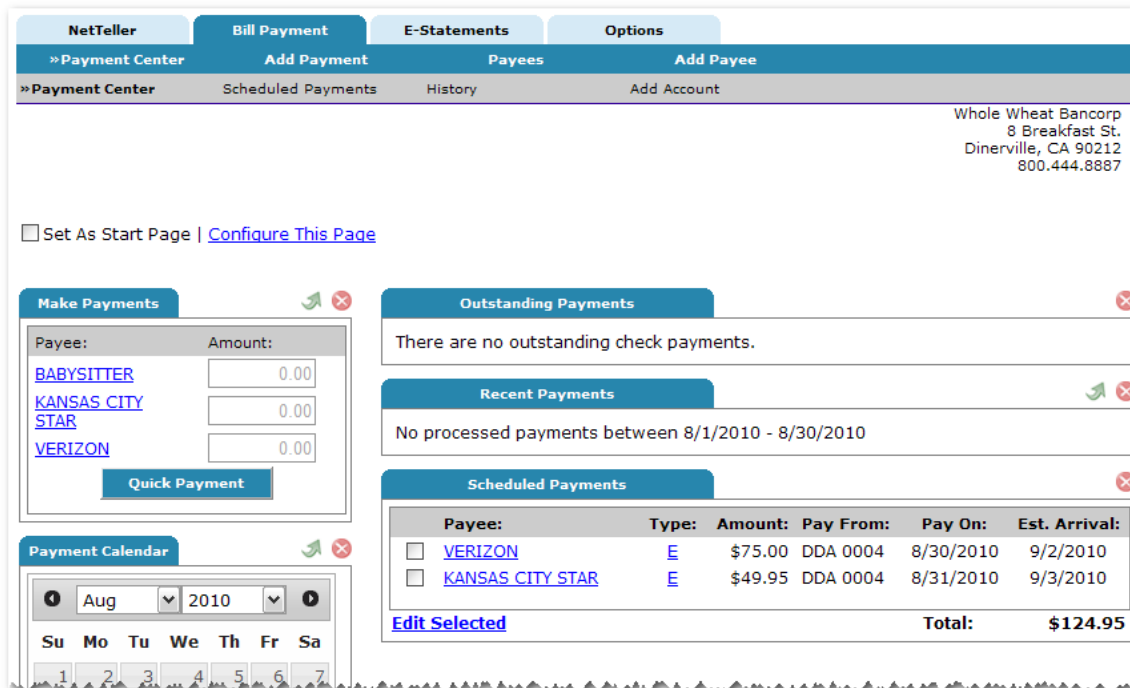
* Marketing Ads are established by the FI through the Manage Marketing Ads option in Configuration menu of FI Management. See the "NetTeller FI Management Training Manual" for details.

** Default widgets are established by the FI through the Launch Page Settings in the Configuration menu of FI Management. See "Launch Page Settings" section on page 3 of this document.

Payment Center Initial View

The Payment Center is housed under the Bill Pay tab in NetTeller. Payment Center functionality will only apply to users enrolled in NetTeller Bill Pay. The user must have established at least one Payee before being able to access the Payment Center option.

Upon navigating to the *Payment Center* option, the user will see default widgets* and page configuration:



The screenshot displays the NetTeller Payment Center interface. At the top, there are navigation tabs: NetTeller, Bill Payment (selected), E-Statements, and Options. Below these are sub-tabs: » Payment Center, Add Payment, Payees, and Add Payee. A secondary row of sub-tabs includes » Payment Center, Scheduled Payments, History, and Add Account. On the right side, account information is listed: Whole Wheat Bancorp, 8 Breakfast St., Dinerville, CA 90212, 800.444.8887. Below this, there is a checkbox for 'Set As Start Page' and a link for 'Configure This Page'. The main content area features four widgets: 'Make Payments' with a list of payees (BABYSITTER, KANSAS CITY STAR, VERIZON) and amount input fields; 'Outstanding Payments' showing a message that there are no outstanding check payments; 'Recent Payments' showing a message that no payments were processed between 8/1/2010 and 8/30/2010; and 'Scheduled Payments' with a table of upcoming payments.

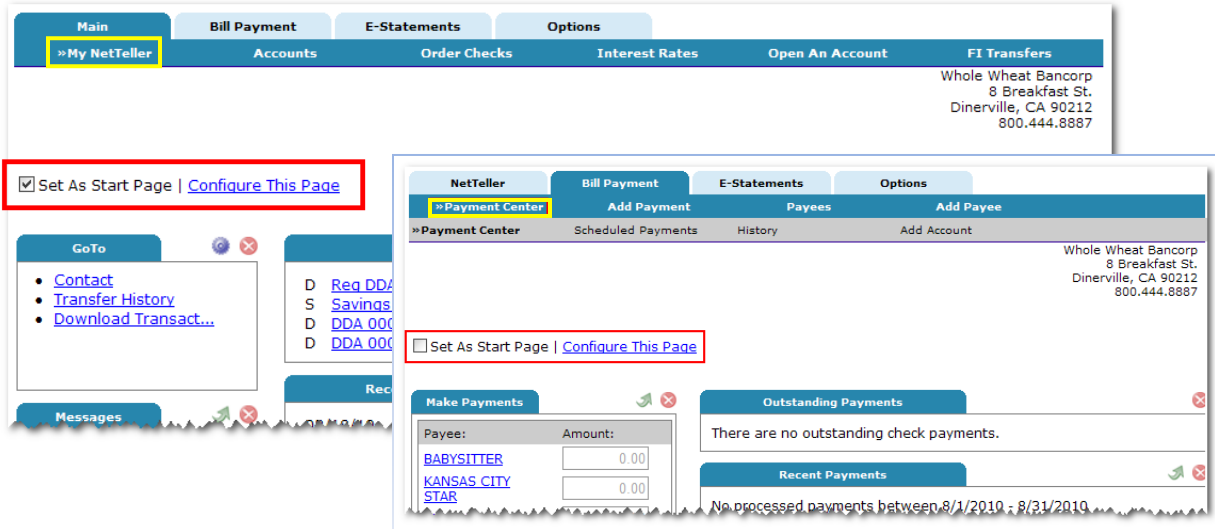
Payee:	Type:	Amount:	Pay From:	Pay On:	Est. Arrival:
<input type="checkbox"/> VERIZON	E	\$75.00	DDA 0004	8/30/2010	9/2/2010
<input type="checkbox"/> KANSAS CITY STAR	E	\$49.95	DDA 0004	8/31/2010	9/3/2010
Total:					\$124.95

Configurable widgets will show a default message indicating the user should use the 'Configure Settings' icon. Once the user initially configures the widget, data will populate.

* Default widgets are established by the FI through the Launch Page Settings in the Configuration menu of FI Management. See "Launch Page Settings" section on page 3 of this document.

My NetTeller and Payment Center Page Configuration

The user can configure the *My NetTeller* or *Payment Center* page with the **Set As Start Page | Configure This Page** option, which appears in the top left portion of each screen.

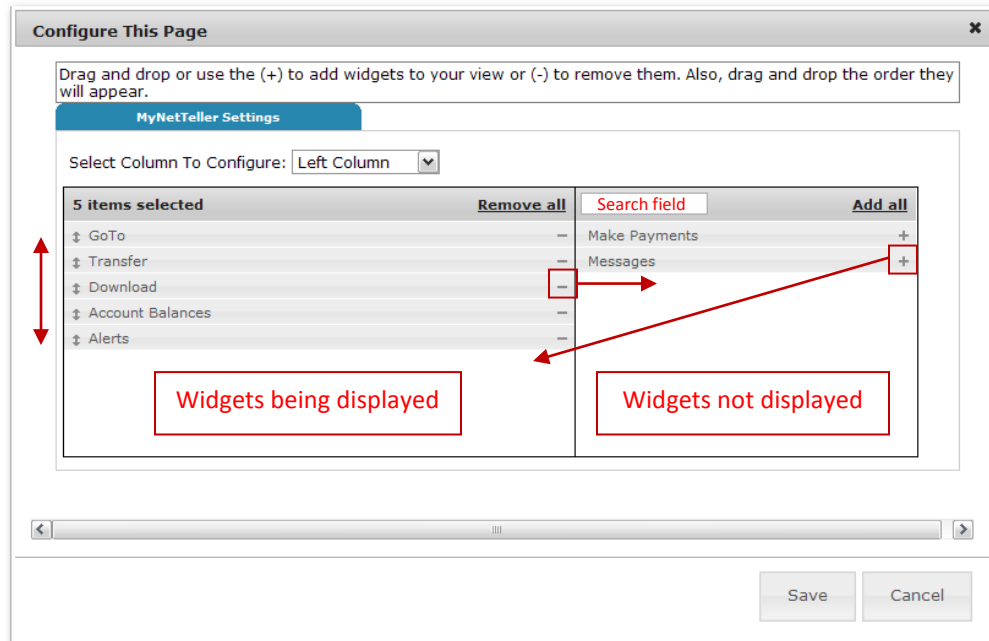


Set As Start Page: Select to save the page as the new landing screen upon login instead of seeing the standard Account Listing page. If left *deselected*, the user must actively navigate to the *My NetTeller* or *Payment Center* options to access those screens.

Note: The user can always navigate to the traditional Account Listing page. The user can also deselect this field to restore the traditional Account Listing page as the default landing page.

Important: Only one Start Page can be selected. For example, if *My NetTeller* has already been selected as the start page, and if the user then selects *Payment Center* as the start page, this new selection will trump the previous selection. The user would be directed to *Payment Center* upon next login.

Configure This Page: Upon clicking this link on either the *My NetTeller* or *Payment Center* page, the user will see a lightbox window allowing control over which widgets to display on that page. Any widget not set as a default by the FI will be listed in the right column of the lightbox window and can be added by the user.



To configure the page:

Step 1: Choose a column to work with from the **Select Column To Configure** drop-down field. The names of widgets (items) assigned to that column will appear below.

Note: *My NetTeller* has a Left, Center and Right column; *Payment Center* has a Left and Right column. The default selection is Left Column. Widgets are assigned into specific columns on the *My NetTeller* or *Payment Center* pages and cannot be reassigned to different columns.

Step 2: Review the widgets being displayed (left side of lightbox).

Step 3: Review the widgets not currently displaying (right side of lightbox).

Step 4: Add or remove widgets and change the order of display, if desired.

- The user can click **minus (-)** on individual widgets to remove that widget from view. The user can also click **Remove all** to eliminate all widgets from view. The removed widgets will then be listed on the right side of the lightbox for later addition.
- The user can click the **plus (+)** on individual widgets to display that widget. The user can also click **Add all** to display all widgets. The added widgets will then be listed on the left side of the lightbox.
- The user can **search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.
- The user can **click and drag** the displaying widgets to change the order.

Step 5: Return to Step 1 until all columns have been set up.


Step 6: Click **Save** to retain changes made to all columns. The **Configure This Page** lightbox will close and the *My NetTeller* or *Payment Center* page will reload to reflect the changes.

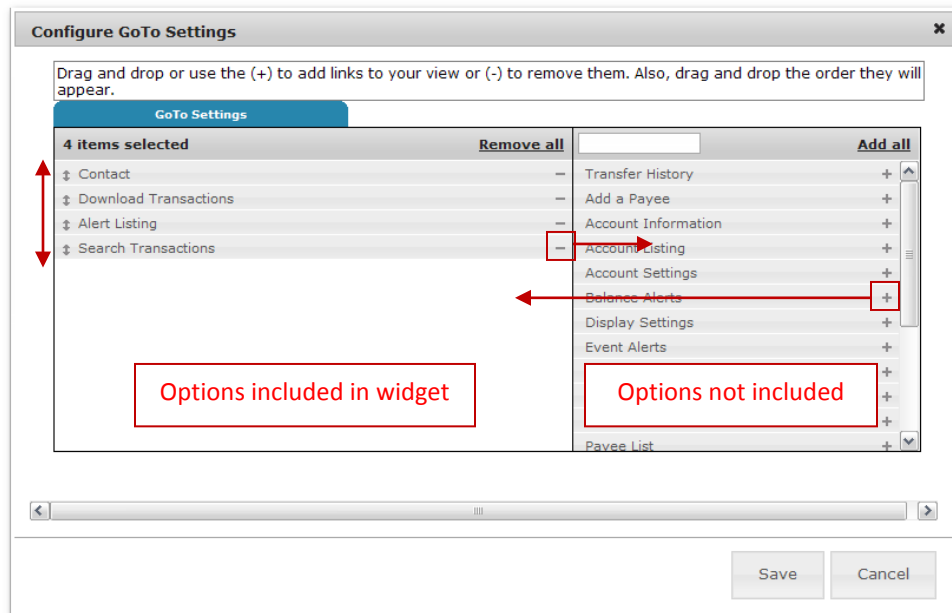
My NetTeller and Payment Center Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration lightbox window will vary based on the purpose of the widget.

Note: The Configure icon will not appear on widgets where configuration is not applicable.

To configure a widget:

Step 1: Click the **Configure**  icon on the widget. The Configure lightbox will appear:



Step 2: Review the items being displayed (left side of lightbox).

Note: A user configuring the widget for the first time will not have any items on the left side.

Step 3: Review the items not currently displaying (right side of lightbox).

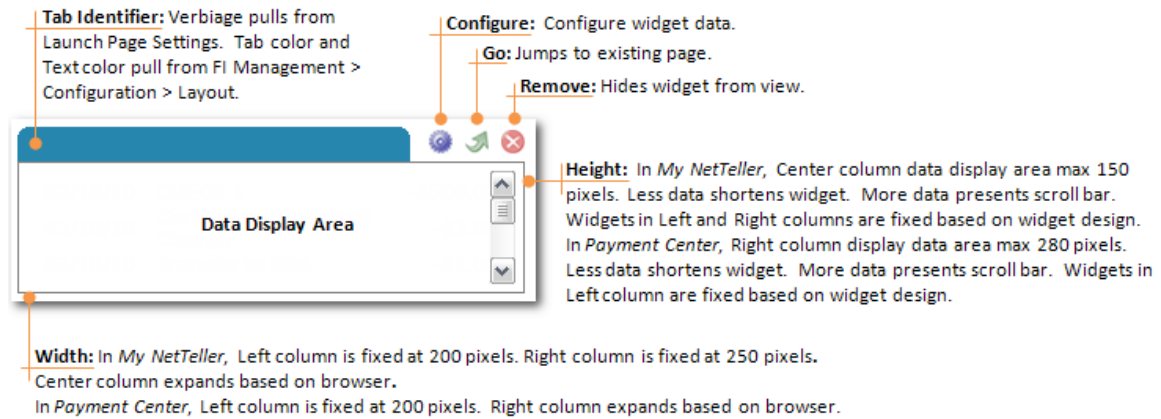
Step 4: Add or remove items and change the order of display, if desired.


- The user can click **minus (-)** on individual item to remove that item from the widget. The user can also click **Remove all** to eliminate all items from the widget. The removed items will then be listed on the right side of the lightbox for later addition.
- The user can click the **plus (+)** on individual items to include it in the widget. The user can also click **Add all** to include all items. The added items will then be listed on the left side of the lightbox.
- The user can **search** the un-added items by keying in the item name. The search box is not case sensitive.
- The user can **click and drag** the displaying items to change the order.


Step 5: Click **Save** to retain changes made to the widget. The **Configure** lightbox will close and the widget will reload to reflect the changes.


Widget Formatting

The widget formatting is as follows:



Configure: Click  to access a lightbox window that allows the user to configure the widget. For example, clicking Configure in the “Recent Transactions” widget shows a list of accounts the user can display within the widget.

Go: Click  to jump to the traditional screen relating to the data contained in the widget. For example, clicking Go in the “Recent Transactions” widget takes the user to Transactions option.

Remove: Click  to immediately remove the widget from the *My NetTeller* or *Payment Center* page. The user can always re-add the widget under the **Configure This Page** link.

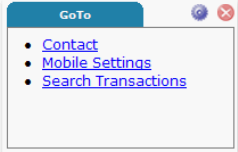
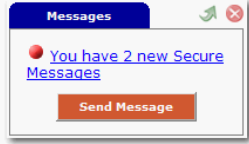
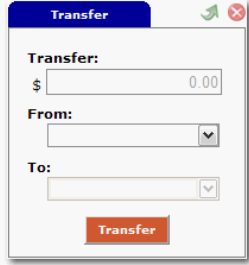
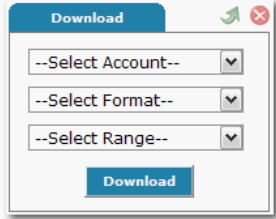
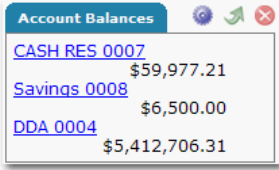

Upon placing the cursor over the **Configure**, **Go** or **Remove** icon, hover text appears defining that icon.

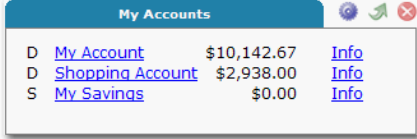
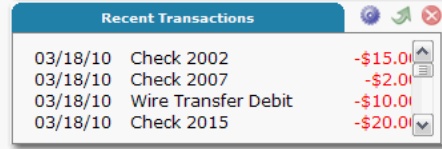
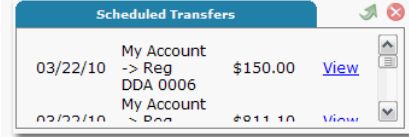
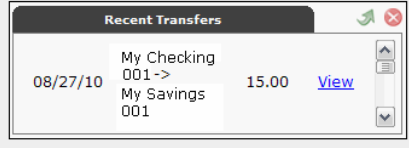
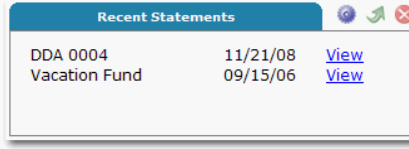

Note: Not all widgets have all three icons.

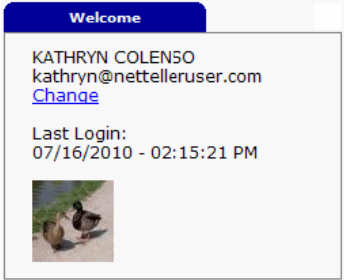
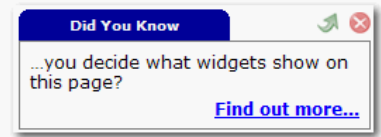
Widget Definitions

My NetTeller Widgets

Note: Availability of widget is based on user's permissions within the NetTeller ID setup.

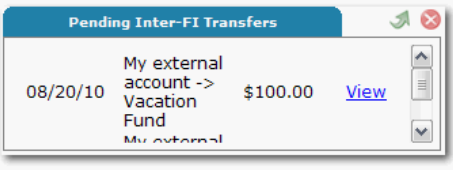
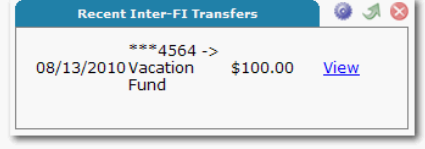
Left Column (Actionable Items)			
Widget Name	Function	Go destination	Image
GoTo	Links to other applicable NT functionality. Also available on <i>Payment Center</i> .	N/A	
Messages	Indicates receipt of secure messages from FI.	Message Center > View Messages	
Transfer	Conduct one-time, immediate transfer. Also available on <i>Payment Center</i> .	Transfers > New Transfer	
Download	Conduct transaction download.	Transactions > Download	
Account Balances	Balance of accounts. Click pseudo name to see Account Info. Also available on <i>Payment Center</i> .	Account Listing	
Alerts	Indicates receipt of login alert.	Options > Alerts	

Center Column (Informational Items)			
Widget Name	Function	Go destination	Image
My Accounts	Shows account, balance. Click pseudo name to access transactions. Link to Account Info.	Account Listing	
Recent Transactions	Last 30 days of transactions on all accounts configured. Roll over transaction to see account number affected.	Current Transactions	
Scheduled Transfers	Lists pending transfers. Link displays all transfer details.	View Scheduled Transfers	
Recent Transfers	Lists transfer history. Link to full transfer details.	Transfers > History	
Recent Statements	Lists NetTeller statements. Link displays statement in lightbox window.	Statements	
Electronic Documents	Links to ESI documents. <u>Note:</u> FI must be installed with ESI and user must be enrolled before this widget is available.	ESI > Statements and Notices	No image available
Recent Payments	Lists last 30 days of Bill Pay history. Also available on <i>Payment Center</i> .	Bill Pay History	

Right Column (FI or user-related Items)			
Widget Name	Function	Go destination	Image
Welcome	Shows user's name, email address, last login info and MFA watermark (if applicable). Link takes user to Personal Options. <u>Note</u> : User cannot remove this widget.	N/A	
Did You Know	<i>My NetTeller</i> tips. Link directs to additional detail about the tip with further access to all tips.	List of all Did You Know topics.	

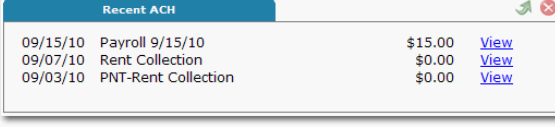
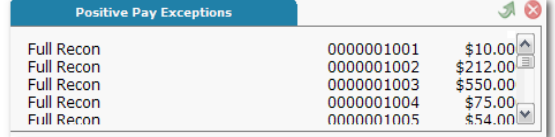

Inter-FI Transfer Widgets

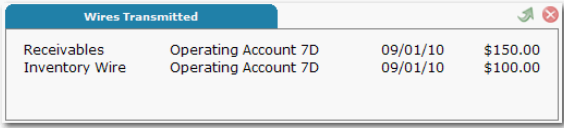
Note: New FI Transfer users can add these widgets after being enrolled in FI Transfer product.

Center Column			
Widget Name	Function	Go destination	Image
Pending Inter-FI Transfers	Lists FI Transfers in a pending status. Roll over to see memo. Link opens window containing all transfer details.	Pending FI Transfers	
Recent Inter-FI Transfers	Lists last 45 days of FI Transfer history. Roll over to see memo. Link displays details.	FI Transfer History	

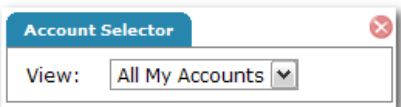
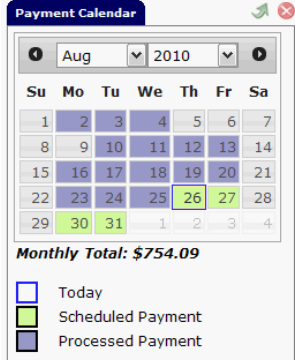
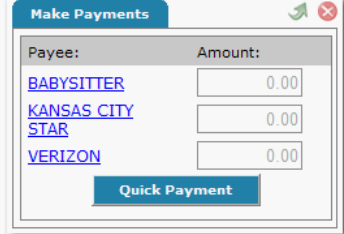
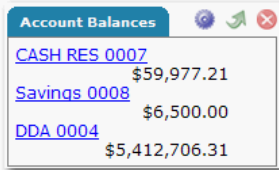
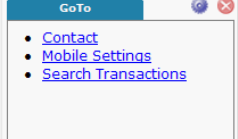
Cash Management Widgets

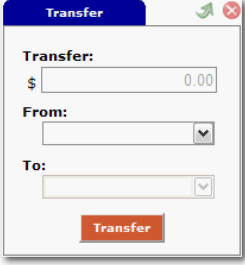
Note: Availability of widget is based on user's permissions within the NetTeller ID/Cash User setup.

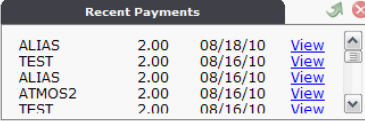
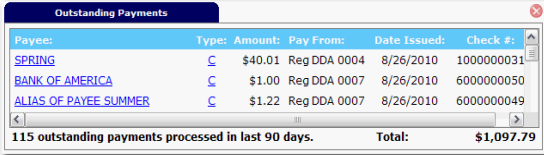
Center Column			
Widget Name	Function	Go destination	Image
Recent ACH	Lists last 7 days of ACH history. Link directs to batch details.	ACH > History	
Positive Pay Exceptions	Lists Positive Pay/ARP exceptions. Roll over to see exception reason.	PositivePay/ ARP Exceptions	
Initiated ACH	Lists ACH batches in an Initiated status. Link directs to View Batch details.	ACH > Batch List	

Wires Transmitted	Lists last 7 days of wire history.	Wires > History	 <p>Wires Transmitted</p> <table border="1"> <tr> <td>Receivables</td> <td>Operating Account 7D</td> <td>09/01/10</td> <td>\$150.00</td> </tr> <tr> <td>Inventory Wire</td> <td>Operating Account 7D</td> <td>09/01/10</td> <td>\$100.00</td> </tr> </table>	Receivables	Operating Account 7D	09/01/10	\$150.00	Inventory Wire	Operating Account 7D	09/01/10	\$100.00
Receivables	Operating Account 7D	09/01/10	\$150.00								
Inventory Wire	Operating Account 7D	09/01/10	\$100.00								

Payment Center Widgets

Left Column																																													
Widget Name	Function	Go destination	Image																																										
Account Selector	View <i>Payment Center</i> data for selected account. Default: All My Accounts	N/A	 <p>Account Selector</p> <p>View: All My Accounts</p>																																										
Payment Calendar	Quick-glance view of payment activity by date. Click on a date to show payment details. Calendar also drives the data displaying on other widgets. Go back up to 19 months and forward up to 12/31 four years ahead.	Larger calendar view	 <p>Payment Calendar</p> <p>Aug 2010</p> <table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> </tr> <tr> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> </tr> <tr> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> </tr> <tr> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> </tr> <tr> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </tbody> </table> <p>Monthly Total: \$754.09</p> <p> <input type="checkbox"/> Today <input checked="" type="checkbox"/> Scheduled Payment <input checked="" type="checkbox"/> Processed Payment </p>	Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4
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22	23	24	25	26	27	28																																							
29	30	31	1	2	3	4																																							
Make Payments	Enter one-time, immediate payments to existing payees. User is taken to second step of Quick Payment to complete the payment and conduct MFA.	Add Payment > Quick Payment	 <p>Make Payments</p> <p>Payee: Amount:</p> <p>BABYSITTER 0.00</p> <p>KANSAS CITY STAR 0.00</p> <p>VERIZON 0.00</p> <p>Quick Payment</p>																																										
Account Balances	Balance of accounts. Click pseudo name to see Account Info. Also available on <i>My NetTeller</i> .	Account Listing	 <p>Account Balances</p> <p>CASH RES 0007 \$59,977.21</p> <p>Savings 0008 \$6,500.00</p> <p>DDA 0004 \$5,412,706.31</p>																																										
GoTo	Links to other applicable NT functionality. Also available on <i>My NetTeller</i> .	N/A	 <p>GoTo</p> <ul style="list-style-type: none"> Contact Mobile Settings Search Transactions 																																										

Transfer	Conduct one-time, immediate transfer. Also available on <i>My NetTeller</i> .	Transfers > New Transfer	
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Right Column			
Widget Name	Function	Go destination	Image
Recent Payments	Lists last 30 days of Bill Pay history. Also available on <i>My NetTeller</i> page.	Bill Pay History	
Outstanding Payments	Displays 90 days of issued CHECK payments that have not yet cleared the user's account. After 90 days, uncleared items drop off the widget. Click the Payee for payment details.	N/A	
Scheduled Payments	Shows scheduled payments for month being displayed. Can Edit Selected payments.	Scheduled Payments	