ABC Company

Online Banking User Guide

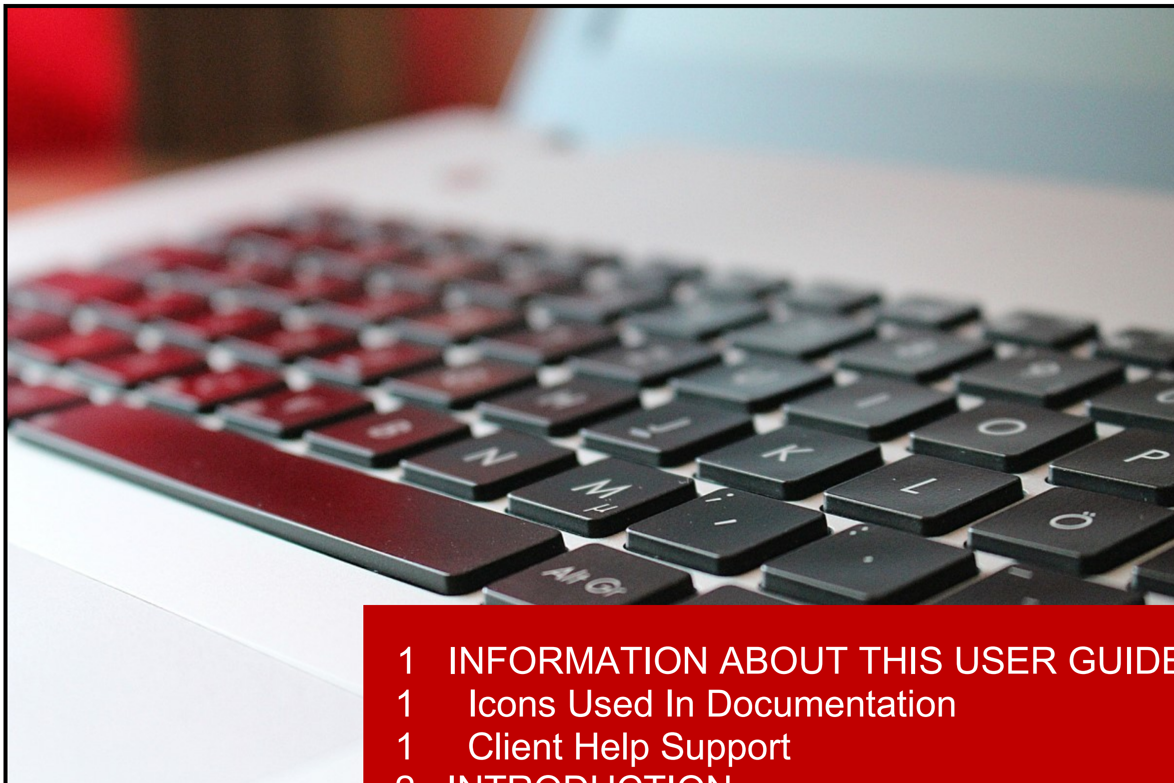
Version 1.0

Month/Year

Produced by ABC Company (Fictitious)

123 Main Street
Suite 100
Any city, State 12345

Table of Contents



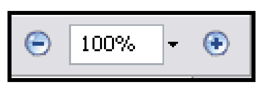
Information About This User Guide

Icons Used In Documentation

As you read this document, you will notice the following icons:

Icon	Description
TIP	Tips contain additional information to help you complete the work more efficiently.
IMPORTANT	Important facts contain critical information that can affect your Online Banking procedures.
SHORTCUT	Shortcuts contain information about a faster way to accomplish a task.
NAVIGATION TIP	Navigation tips contain information about navigating through the Online Banking system pages (screens).

TIP: To increase the viewing size of the information and screen captures of this document, use the Zoom feature of Adobe Acrobat Reader. Click the plus (+) sign to increase the viewing size and the minus (-) sign to decrease the viewing size of the document.



Client Help Support

For any questions concerning the Online Banking system, contact the Help Desk at 800-123-4567 or email [insert email address here].

Introduction

ABC Company is your reliable online banking partner. We provide you with the most innovative and reliable services for your online banking needs. This User Guide includes information about the services offered and made available to you and is divided into to the following sections.

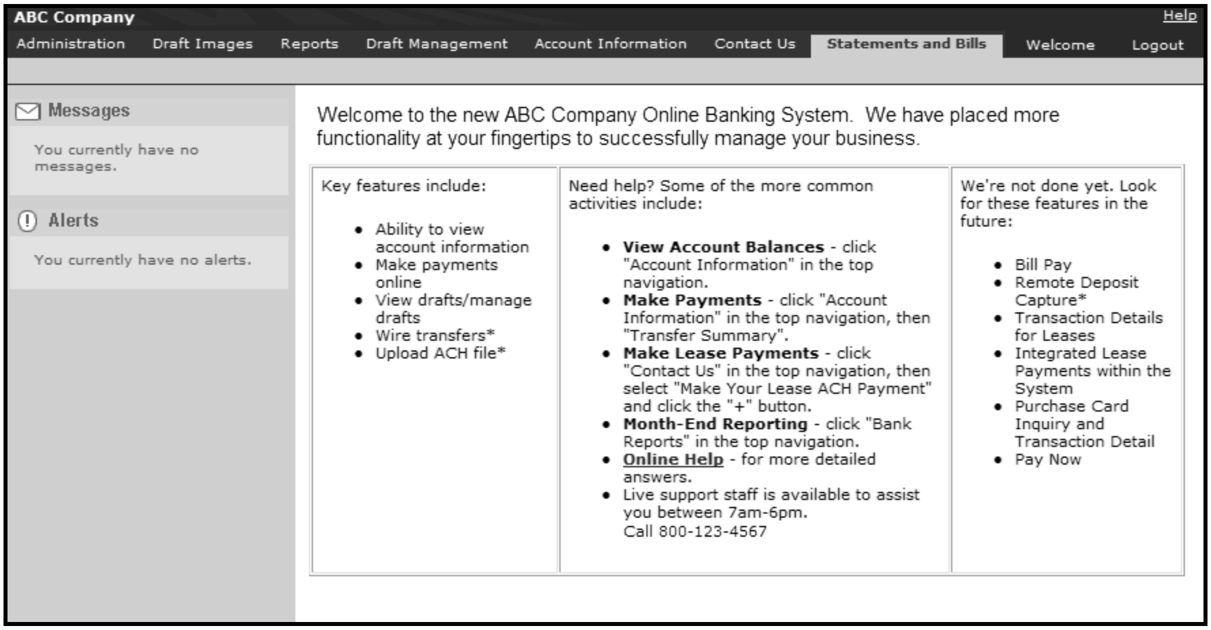
- **Navigation and System Overview**

  (**NOTE**: *The following bulleted sections are not included in this user guide sample, but rather are included to show how I prefer to write an introduction*.)

- **Log In**
- **Services:**
  - **Administration Service** allows you to manage administrative activities within Online Banking. These activities include maintaining passwords and email address, setting up alerts and managing Online Banking sub-users (if any).
  - **Draft Images Service** allows you to view images of processed drafts from your draft accounts. You may also create draft images reports
  - **Bank Reports Service** allows you to view prior month-end balances.
  - **Draft Management Service** allows you to manage the draft activity on draft accounts. You may view, inquire, stop payments, and print standard reports about your draft activities. When you select draft management from the navigation menu, the lists of features you can use are displayed.
  - **Account Information Service** allows you to view and manage account and transfers information. You may also create account information reports. Certain rules may apply to different types of accounts.
  - **Contact Us Service** allows you to communicate directly with our customer service department via email. Your messages are delivered via the Online Banking administration system used by customer service.
  - **Statements and Bills Service** allows you to view and print your bank statements and bills from ABC Company.

Home Page

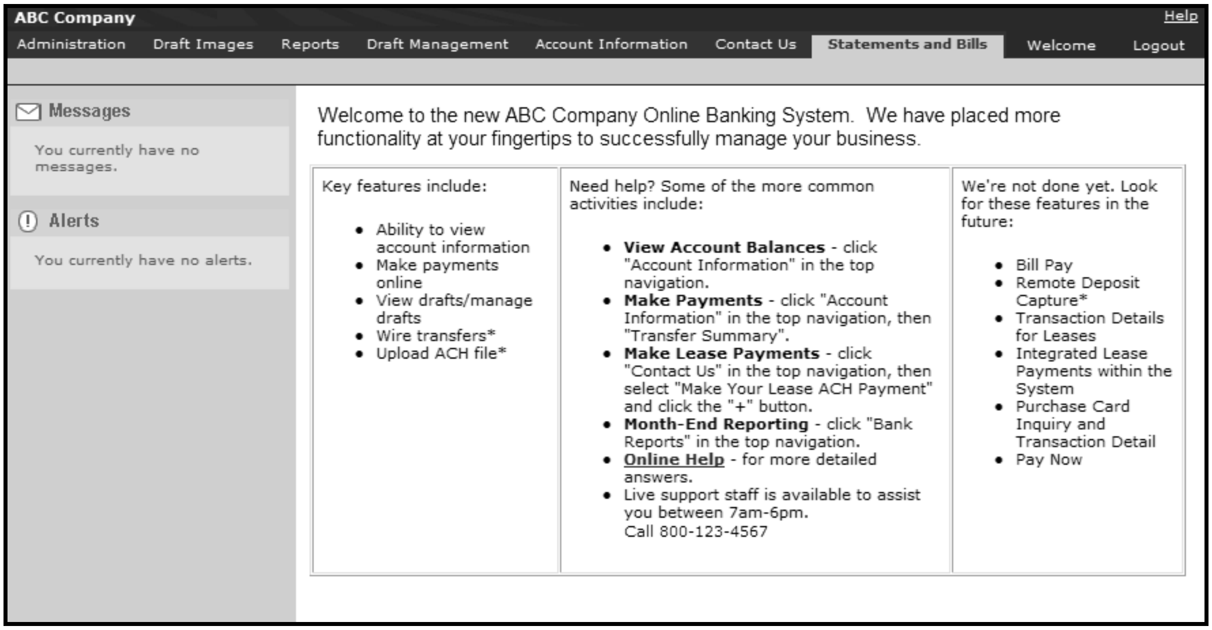
Following a successful log in, the Online Banking Home page displays the services and activities that you can use. All services for Online Banking are accessed from this page.



Your Home page may display messages from ABC Company, alerts regarding scheduled activities as configured by your system administrator, and/or alerts regarding your accounts at ABC Company.

Navigation and System Overview

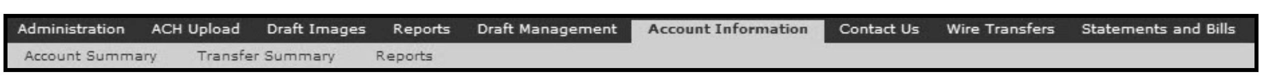
All services and activities for Online Banking are initiated from the Home page. Because the look and feel of Online Banking is customized, your pages may differ slightly from the examples included in this user guide.

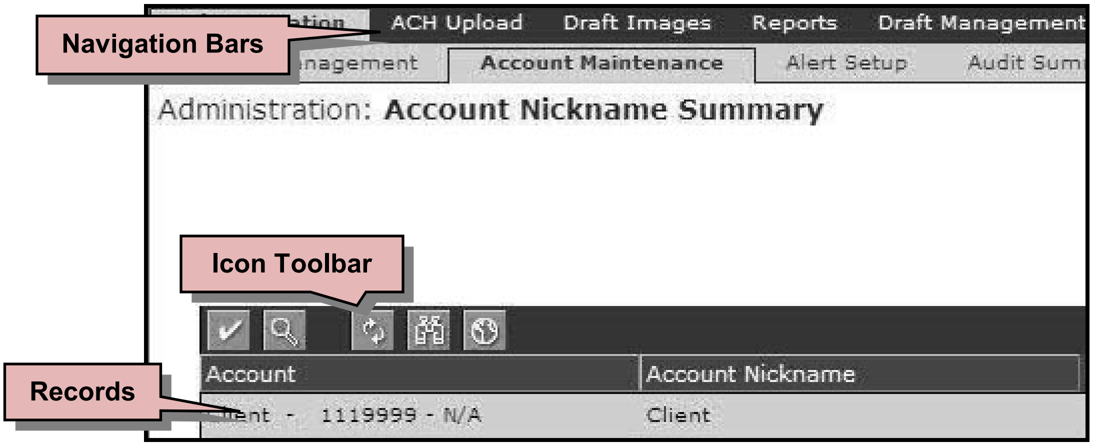


Navigation Bars

Your services appear on the **main navigation bar** at the top of the page.

When a service is selected, a **second navigation bar** displays the activities you can perform within the service.

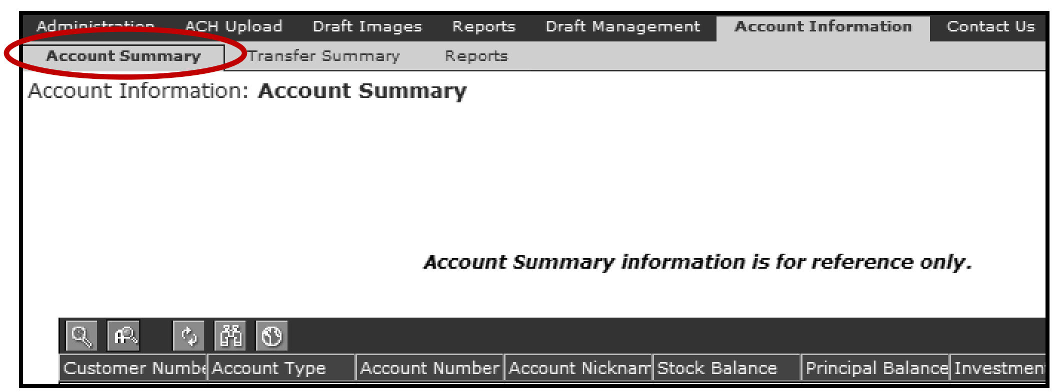




The first activity for each service is the Summary page that displays data in a table format. The date and time information in the table was received from ABC Company displays above the table. Certain tabs on the **main navigation bar** will open a new window, and it will not have a second navigation bar or a Home page.

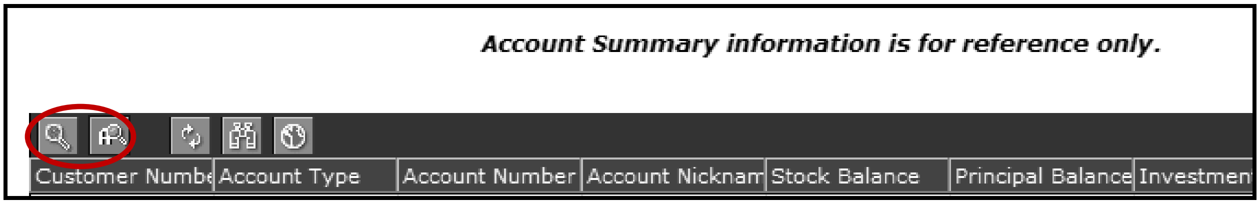
Main Viewing Area

Below the navigation bars is the main viewing area of the page. When you click on an activity within a service that you want to perform, it displays the information in a summary table in the middle of the page.



Summary Table

Detail information can be viewed from the summary table by double-clicking on the selected item, or by selecting the item and then clicking on an icon. In addition, you can initiate other activities from the second navigation bar. Every module can go from a summary table/page to a more detailed information page.



Icons and Buttons

Icons and buttons provide a quick way to access the most commonly used commands and functions of Online Banking. Icons displayed at the top of each table are used for navigation. The tables below contain descriptions for the icons and buttons that may appear in Online Banking.

Icons

Icon	Name	Purpose/Navigation
	Add	Displays the **Add** page for records, forms, etc.
	Delete	Deletes the highlighted/selected row from the displayed table. The icon is disabled if a row is not selected.
	Modify	Displays the **Modify** page so that you can edit and existing definition, record, or setup.
	View Detail	Displays the detail for a selected record/row.
	Find	Displays the **Find** page. From this page, you may search for a value in a specified column or group of columns.
	Environment	Displays the environment settings for a page/table. You may modify the filter, column, and sort settings for the displayed page/table.
	Calendar	Displays the calendar for the current month and year. From the calendar, you can select another day, month, and year.
	Print	Prints the data in the displayed or selected table.
	Refresh	Updates the table with the most recent data from the database.
	Model	Displays the **Add Using Model** page. You may create a new record based on the information set up in an existing record.
	Service Parameters	Displays the types of service parameters that exist for a Customer or Account or Customer User.
	Restore A Deleted Record	Allows user to view and restore deleted records.
	View & Approve	Allows user to view and approve wire transfers.
	Quick Approval	Allows user to approve wire transfers.
	View Sent Forms	Allows user to view sent forms.
	Import	Allows user to import files into Online Banking.
	Change User Password	Allows user to change their password.

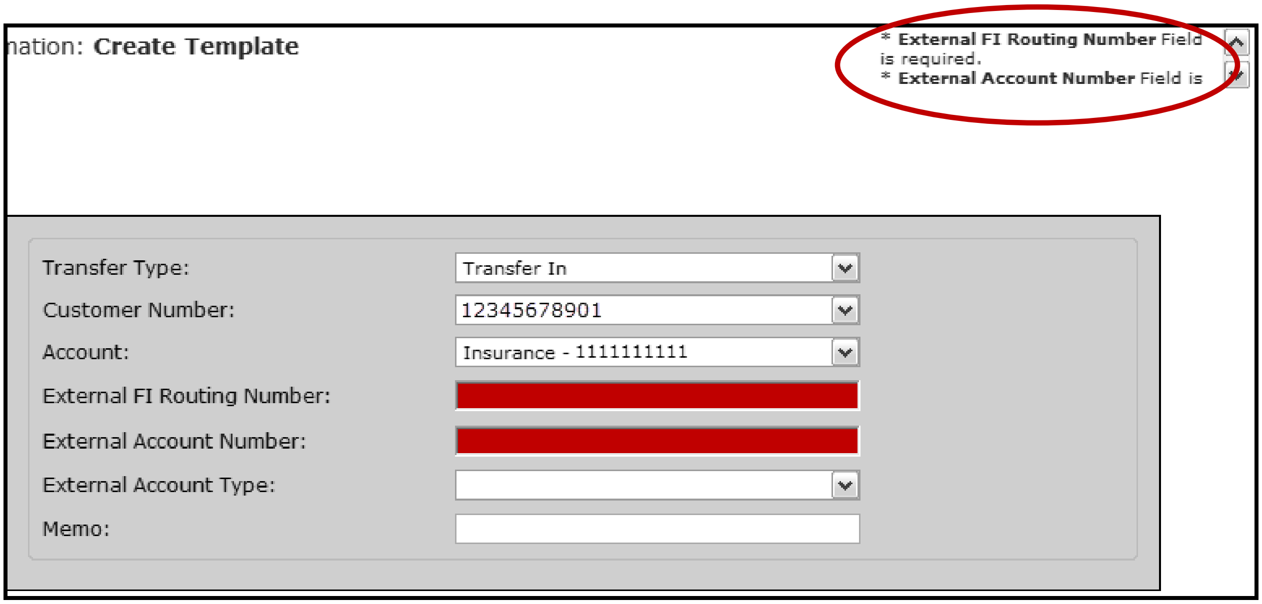
TIP: Hover over the icon to display the name of the icon.

Buttons

Button	Purpose/Navigation
Cancel	Closes the page without saving any changes.
Close	Closes the current page.
OK	Acknowledges the request and returns to the previous page.
Add >>	Adds a value or record to a selected table, and/or to the database.
Add All >>	Adds all available values to the selected values list.
Preview	Displays a preview of the selected item in the Report Summary table. The button is disabled if a row is not selected.
Previous	Returns to the previous page of the report, if available.
Print	Sends a copy of a report to a printer or displays a print preview of "view detail" items.
< Remove	Removes selected assigned value from the Selected Values list.
<< Remove All	Removes all selected values. All removed values display in the Available Values list.
Report	Generates a report.
Restore	Restores original default values.
Save	Saves, as entered/displayed, all parameters for this page.
Yes	Continues with processing the transaction or process after a Warning Message page is displayed. Assumes continuation without resolving the problem.
Yes to All	Continues with processing the transactions or processes after a Warning Message page is displayed. Assumes continuation without resolving the associated problem(s).

Errors and Error Messages

When the Online Banking system detects an error in data you entered, it will highlight the error field(s) in red. The error messages display as text in the upper-right corner of the page.



Environment Parameter Options

Most summary tables in Online Banking have an environment parameter feature. This feature allows you to customize the tables you see in Online Banking. You can adjust these environment settings for a single online session or you can save your environment settings for use whenever you log on to Online Banking.

To set or adjust environment parameters:

1. Click the **Environment** icon at the top of a summary table.

A page displays environment-setting options you may use to filter the records you want to view; or change what columns you want to display in the table.

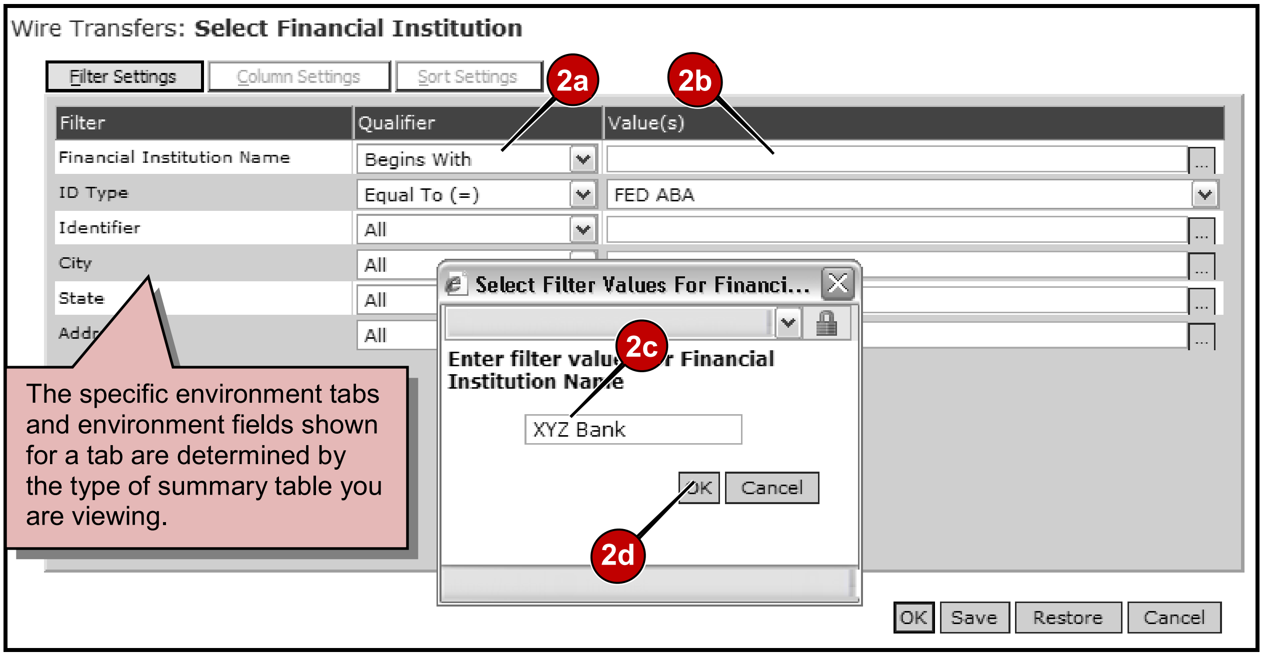
2. To filter the records you view in a summary table, click the **Filter Settings** option.

a. Select the qualifier for each filter from the **Qualifier** drop-down list.

b. Specify the values for each filter in the **Value(s)** field. A *Filter Values* dialog box displays requesting specific values for the filter/qualifier.

c. Enter or select the values in the *Filter Values* dialog box.

d. Click **OK** to add the value(s) to the filter settings.



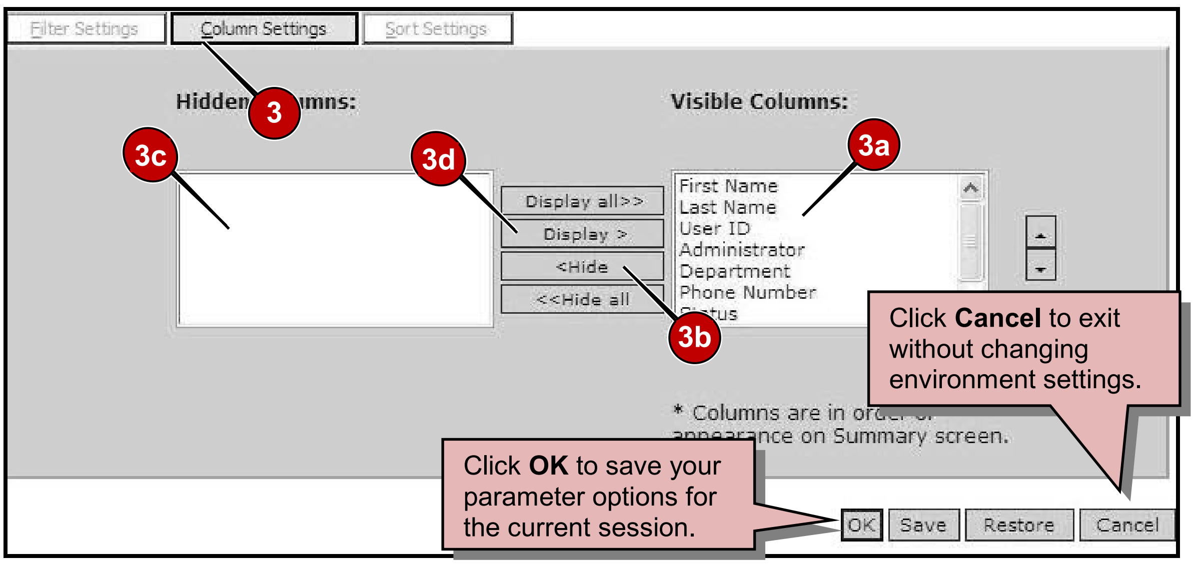
3. To change what columns you want to view in a summary table, click the **Column Settings** option.

   a. To hide individual columns, select the name of the column in the **Visible Columns** list box.

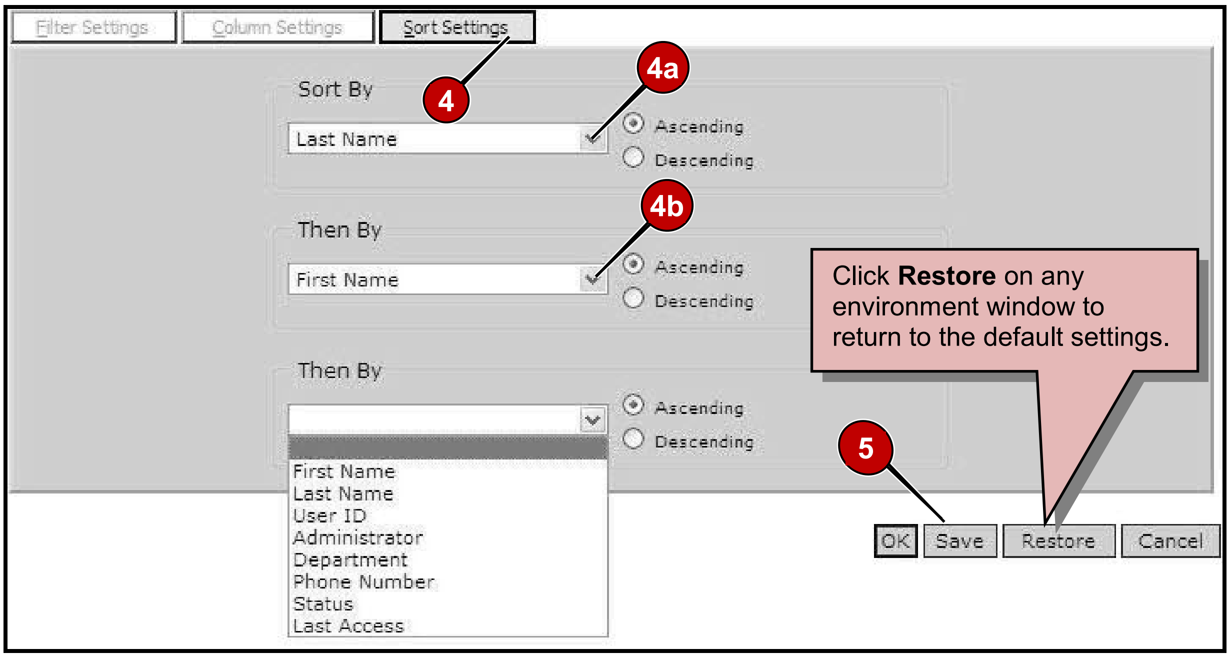
   b. Click **Hide**. The column no longer displays in a table. Repeat for each column you want hidden.

   c. To make individual columns visible, select the name of the column in the **Hidden Columns** list box.

   d. Click **Display**. The column displays in a table. Repeat for each column you want visible.



4. To change the sort for the summary table, click the **Sort Settings** option.
   a. Establish the first sort criteria by selecting the column name from the **Sort By** drop-down list. In addition, determine if you want the information displayed in ascending or descending order, and if you want the information grouped or counted.
   b. Select any secondary sort criteria from the **Then By** sections.



5. Click **Save**. This allows your custom settings to be your default each time you log in to Online Banking.