fiserv.

Corillian Online® ASP

Release 16.1

Corillian Online® ASP Configuration Tool Guide

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Corillian Online ASP Configuration Tool Guide

Use the Configuration Tool to define all of the aspects of the online banking site, including branding the site, setting up the accounts to display in the site, adding your own text to pages and lightboxes, and defining your own business rules and policies.

Getting Started

In this section, you will learn about how financial institutions use the configuration tool to set up the online banking site. Topics include information about the online banking configuration tool tasks, working with gradients and colors and how to get the best results using your financial institution's logos on the site.

Introduction to Configuring the Online Banking Site

The Corillian Online ASP online banking site is made up of many components with customizable settings for both visual and operational features, so that you can make the site distinctly your own. Using the configuration tool, you will be able to

- Implement a color palette that supports your financial institution's branding

- Upload your own logos to place in strategic areas

- Create business rules for transaction limits and other operational activities

- Define a password security policy

- Add your financial institution's account products for display in the site

- Create customized text messages to add to any page or lightbox

This guide contains the information to perform all of these activities, as well as helpful information and guidelines, when needed.

Before you get started, there are just a few things to remember.

1. In order to use the configuration tool, you must have a Relationship Manager account with the correct permissions. Contact your financial institution's administrator if you need access to Relationship Manager.

2. A configuration tool session times out after **10 minutes**. If you have not saved your changes during that time, you may lose them. For that reason, we recommend that you save your changes often throughout a session.

3. The configuration tool can be edited by only one person at a time. If you open the configuration tool while another user is editing settings in the tool, you will see a message stating that the system is locked. You can review and look at all of the settings, but will not be able to edit as long as the session remains locked.

4. Be sure to use meaningful descriptions for your session summary notes. This will make it easier to locate certain changes in the history.

Launching the Configuration Tool

Relationship Manager, including the Configuration Tool, can only be accessed from a Windows personal computer using Internet Explorer.

1. Using Internet Explorer, log in to Relationship Manager with your User ID and PIN code.
   The Login Authorized page is displayed.

2. Click the **Continue** button.
   The Welcome page is displayed.

3. In the left navigation panel, click the **Settings** link.

The Site Configuration Settings page is displayed.

admin@corillian
since 5/5/2014 8:31:05 am

Client Settings

REPORTING

RELATIONSHIP

WORKFLOW

MARKETING

SETTINGS

SYSTEM SETUP

LOG OFF

Site Configuration Settings

Staging Settings History

Status: Active
Description: Enabled principal only payments
Date: 5/2/2014 2:28:02 PM
By: Admin

[Promote to Production]   [Reset from Production]

Production Settings History

Status: Active
Description: Enabled principal only payments
Date: 5/2/2014 2:28:02 PM
By: Admin

4. Click the **Settings** link in the Staging section.

The Configuration Tool page is displayed.

Client Settings

FI: Corillian
Description of changes: [   ]

[Back to Summary]   [Edit Settings]

In order to edit your settings you must click the Edit Settings button.

Look & Feel	Settings	Security	Contacts	Setup	Account Groups	Account Types	Content

⊞ **Header**

⊞ **Navigation Bar**

⊞ **Body**

⊞ **Footer**

[Back to Summary]   [Edit Settings]

5. Click the **Edit Settings** button.

Working With Colors

The ability to choose colors for certain elements in the online banking site is an important tool for branding the site to reflect the financial institution (FI). Using the Look and Feel tab options in the configuration tool, you have the ability to choose the colors that best match with your FI's logo and color palette on your primary public website.

The configuration tool supports three different methods for defining colors:

1. Direct entry of hexadecimal color codes

2. Choosing colors from a color picker tool

3. Using named colors

Using Hexadecimal Color Codes

For the most control over the colors used on the online banking site, specifying colors in hexadecimal format enables precise definition of colors. This is especially helpful when you are working with a pre-defined color palette.

Hexadecimal colors are a representation of the standard red-green-blue (RGB) colors used on displays. Theoretically, over 16 million colors can be defined using this format, though most modern monitors are capable of differentiating at 16,000 or more colors.

All of these colors can be created by using various combinations of red, green and blue ranging from 0 to 255, that is, 256 shades for each red, green and blue color that makes up an individual color.

When we define a color in hexadecimal format, we are using the same RGB values. The only difference is that instead of regular numbers, we use hexadecimal numbers instead, which only need 2 characters to express any shade between 0 and 255.

As an example, we can look at this sample of a pale green color swatch and the RGB and Hexadecimal values that define that color.

	RGB Definition	R=223, G=242, B=236
	Hexadecimal Definition	#DFF2EC

In this example, the first group, Red, is defined as 223 in RGB format and DF in hexadecimal. The number is the same; the only difference is the numbering system. Note that all hexadecimal colors must be prefixed by "hash" sign: #.

Using the Color Picker Tool

The configuration tool provides a color picker tool for each element that asks for a color definition.

Top open the color tool, click on the color swatch next to the element, as shown here:
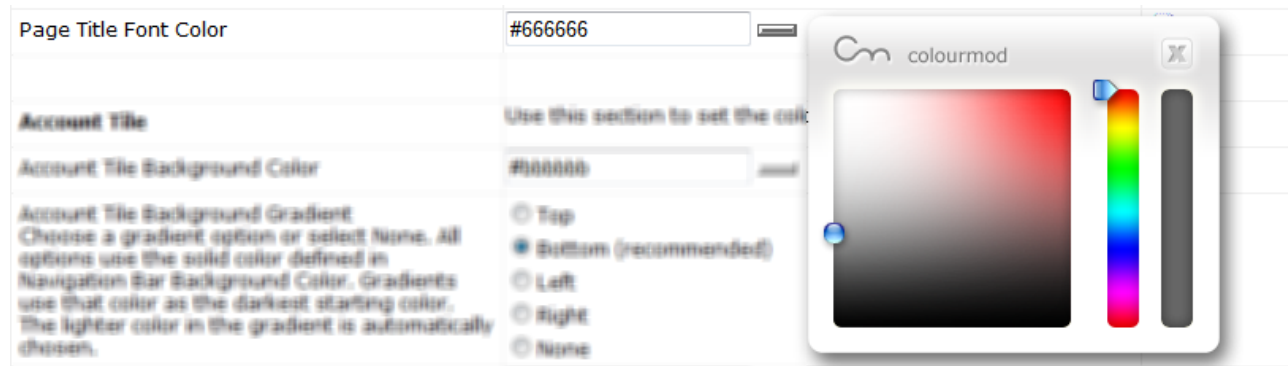
In this example, we clicked on the color swatch for the Page Title Font Color, which uses a dark gray color #666666. When the color picker opens, it is set to that color. To choose another color, select the blue dot with your mouse and move it around until you see the color you want in the right-side color strip.

Using Named Colors

Named colors may be used to define a color in online banking. For best results for use on various browsers, choose from these sixteen colors.

Swatch	Name	Hexadecimal Value
	black	#000000
	white	#FFFFFF
	silver	#C0C0C0
	gray	#808080
	red	#FF0000

Swatch	Name	Hexadecimal Value
	maroon	#800000
	yellow	#FFFF00
	olive	#808000
	lime	#00FF00
	green	#008000
	aqua	#00FFFF
	teal	#008080
	blue	#0000FF
	navy	#000080
	fuchsia	#FF00FF
	purple	#800080

👉 **Important:** When specifying a named color, use all lower case letters. Example: use navy, not Navy or NAVY.

About Gradients

Certain elements in the online banking user interface can use gradients with the background color to provide visual interest. Elements that can use gradients include the page header and footer, account tiles, parts of the navigation bar and the outer page background.

The larger visual areas, such as the account tiles and the outer page background, offer four gradient options: top, bottom, left and right. Smaller areas, such as the active link in the navigation bar, use only top and bottom. In all cases, the option to use a solid color instead is offered. For all elements that support gradients, one option is marked recommended for best results, but the choice of the appearance is always up to the financial institution.

The gradients used in the online banking site are automatically calculated; only a starting color is needed. Gradients are designed to provide a subtle enhancement to the site.

Here are images of an account tile showing all of the gradient styling options. All images use the same background color: a pale grey (#bbbbbb).

- **Top** option. Background color on top, fading towards the bottom.
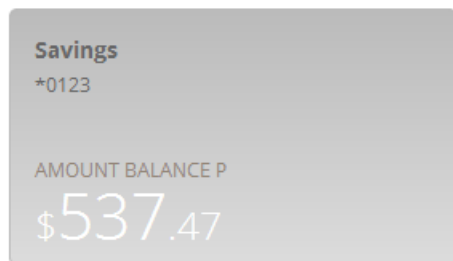
- **Bottom (recommended)** option. Background color at the bottom of the tile, fading towards the top.
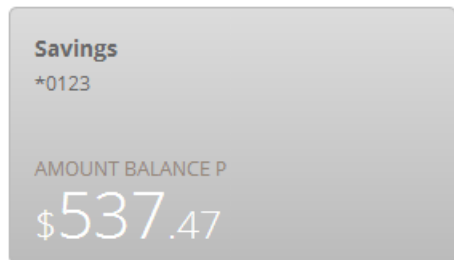
- **Left** option. Background color starts on the left side of the tile, fading towards the right side.
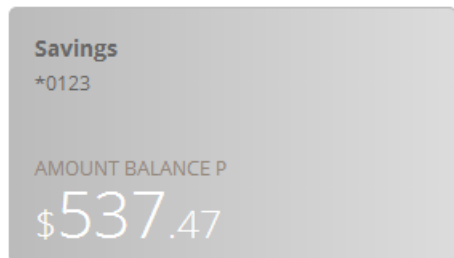
- **Right** option. Background color starts on the right side of the tile, fading towards the left side.

- **None** option. No gradient used; the background color is solid on the tile.
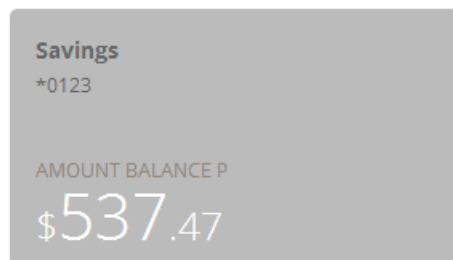
Working With Logos

Each financial institution (FI) can add its logo to the online banking site. In addition, the footer has a space provided for any certification logos that the financial institution wishes to use.

Header

The left portion of the header is reserved for the inclusion of the financial institution's logo. The logo, when uploaded, starts at the upper left corner of the header. The height of header will expand to accommodate the height of the he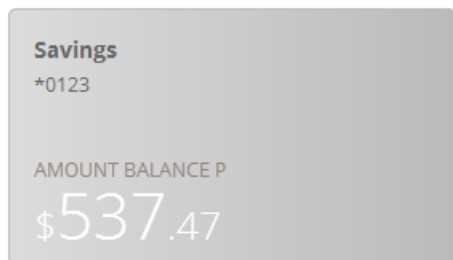ader image. For very large logos, this would result in a large header. You can easily use graphics tools to resize your logo to exactly the size you want.

The following diagram shows the online banking site header with a sample logo that measures 130 pixels wide by 47 pixels high. The logo also uses padding, which is added automatically.
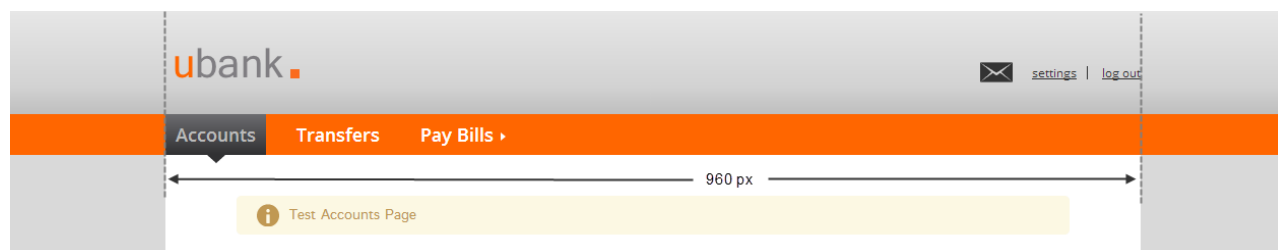
As this image shows, the main body of the online banking site is always 960 pixels wide. However, the navigation bar and header backgrounds extend to the edge of browser window and an outside page area is added on the sides as well. Note, however, that all of the header content (FI logo, message center logo, and settings an log out links) are situated within the 960 pixel area.

👉   **Note:** For best visual results, never enlarge an image that is not big enough, as the quality of the image will likely degrade significantly. You can, however, successfully shrink images that are too large.

For detailed information about using a logo in the header of the online banking site, see *About the Header*.

Account Tiles

Financial institutions can also use a logo on the account tiles on the Accounts and Account Detail pages.

Note that the logo used here is smaller than the one used in the header. Your logo may use up to 80x80 pixels in the upper right corner of the account tile. The logo shown in this illustration is 54px wide by 14 px high.

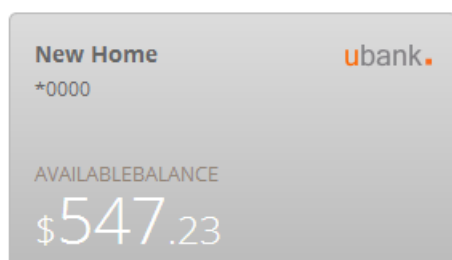For detailed information about adding a logo to account tiles, see *About Account Tiles*.

Footer

Space is provided in the footer to use a certification logo image. Here is an example footer showing both a Campaign Manager ad and a certification logo in addition to the copyright statement and several footer links.
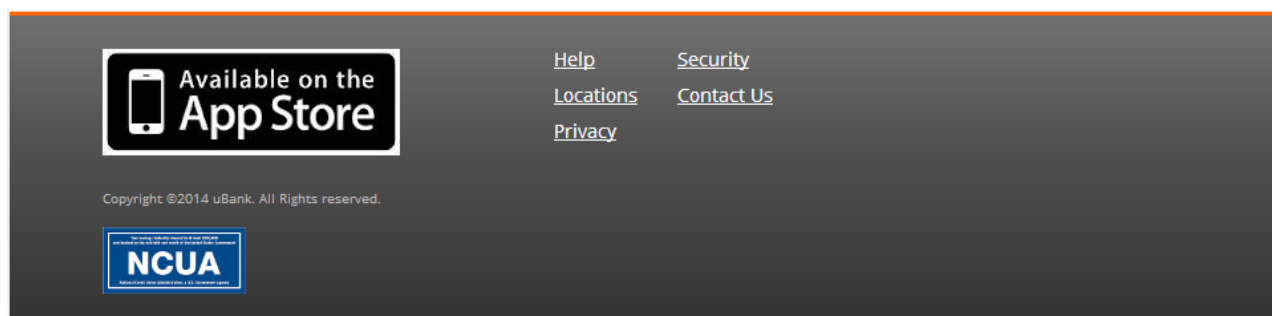
In this example, only one certification logo image is used. If you wish to use multiple certification logos in your footer, you can create a single graphics file with those logos added into the same graphic.

For detailed information about using certification logos in the footer, see *About the Footer*.

About Deleting Graphics

Once you have added a logo or footer certification logo to online banking, the site will, from then on, expect a graphic to be used in that spot. In this instance, you'll see an X mark that indicates a missing image. That means that if you delete a logo graphic, you will need to replace it with another graphic.

If you decide that you would prefer to not show a logo in a location, you should replace the old graphic with a small transparent .gif file. This file can be very small, even 1 x 1 pixels.

This does **not** apply to graphic ads used in marketing ad spaces.

Working With Text

An important aspect of customizing the Corillian Online ASP (COASP) online banking site is entering text content that appear in various places in the user interface and in email messages sent to your customers. This content includes

- Optional page messages that you can add to pages and lightboxes in the COASP user interface

- Text for alerts and security alerts email messages sent to users

- Text for links in the footer on all pages

- Text for links in the services module

This topic includes hints and tips for using text, information about how the configuration tool uses text, information about macros and variables used in some text and examples of the text content that can be configured.

Hints and Tips For Using Text

Most of the text that you'll be entering is short, but some are longer. The text boxes in the configuration tool are simple and do not include spellchecking or any formatting options. You may, if you wish, create your text entries in a word processor, run the spell checker and then save the content as plain text. This procedure explains how to use Microsoft Word to create and prepare text for the COASP configuration tool.

1. Open Microsoft Word and type your text in a new document:
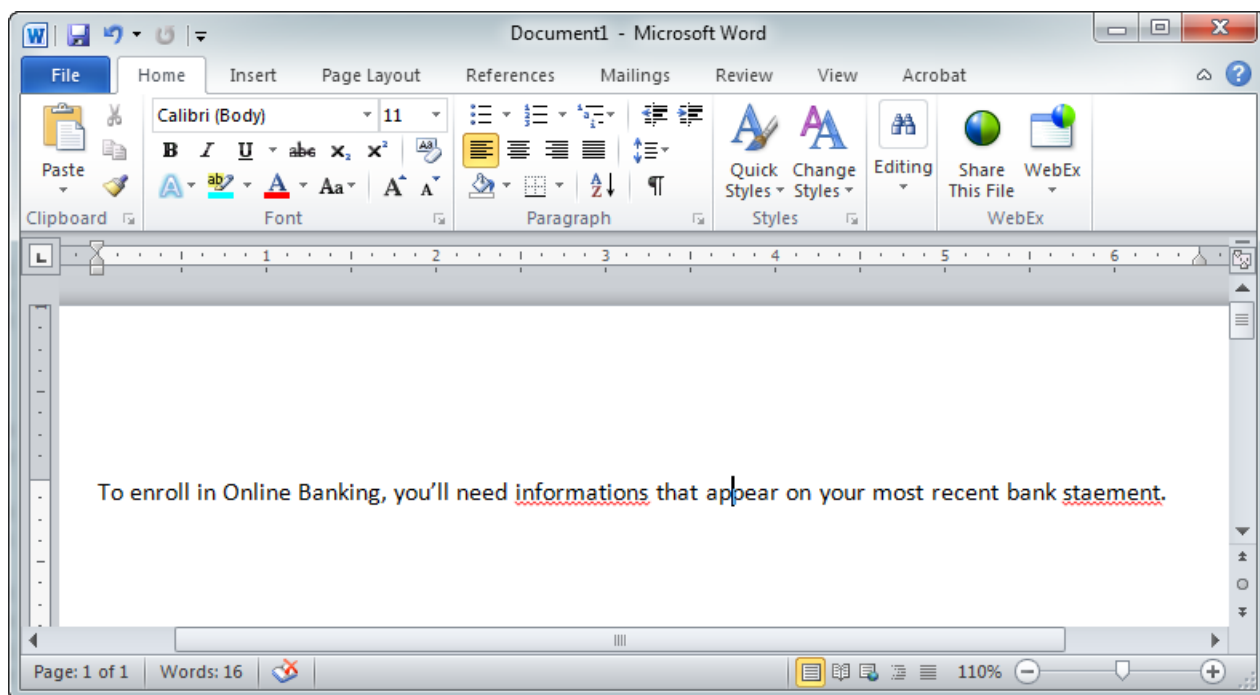
2. Use Word's built-in spellchecker on your text:
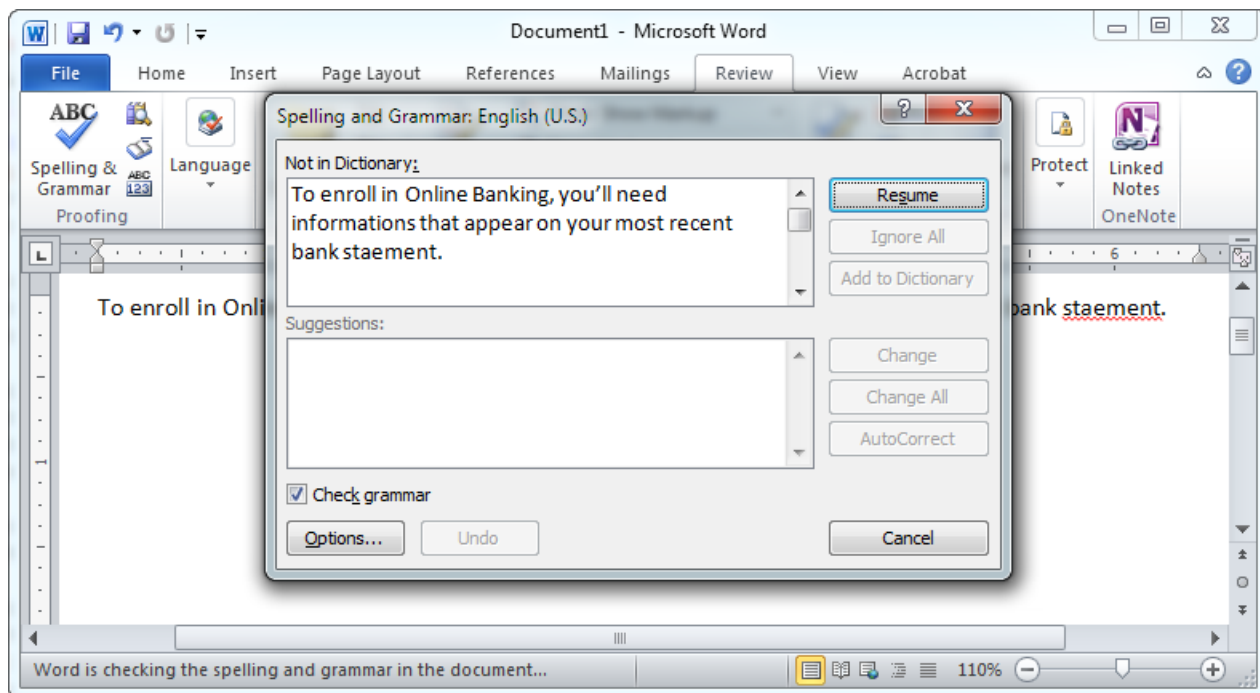
3. From the File Menu, select Save As using the plain text option:
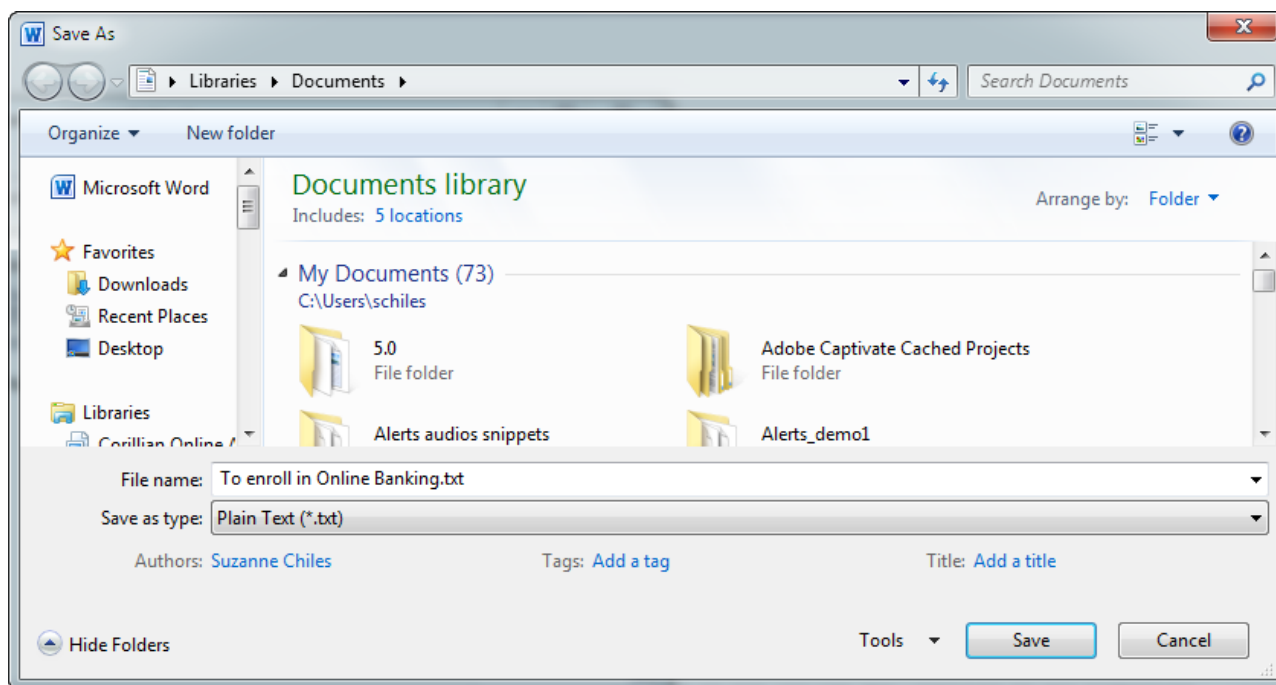
4. Open the file you just saved in a text editor, such as Microsoft's Notepad:
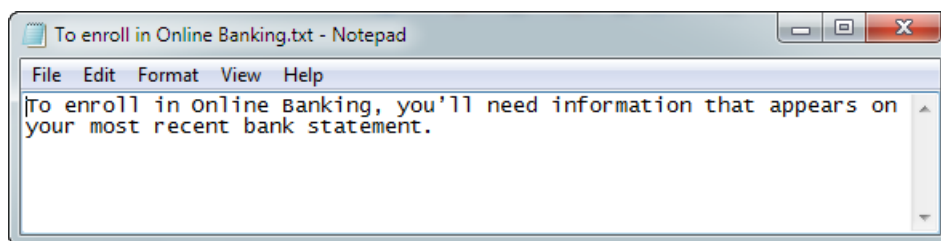
5. Select the plain text, copy it and then paste into the desired text box in the configuration tool.

Here is the text that was created in the last step and pasted into the page message that appears on the Enrollment page in COASP.

Localization

Corillian Online ASP supports Spanish for the online banking user interface. All of the default textual content has been translated to Spanish and will be used when a user selects the Spanish view of the site.

If your financial institution has added Spanish localization, your textual content will include both Spanish and English in the configuration tool. This example show the text for the list view of asset accounts on the Accounts page.

In this example, each column in the asset table has a default name and that name has already been translated into Spanish.

Asset Table Labels in List View

Asset Table Header

en: Checking and Savings

es: Cheques y Ahorros

Account Name and Number Column Header

en: Account

es: Cuenta

Available Balance Column Header

en: Available Balance

es: Saldo Disponible

Current Balance Column Header

en: Current Balance

es: Saldo Actual

If a financial institution that has enabled Spanish chooses to change a column name, the financial institution is also responsible for providing the Spanish translation.

Entering Text in the Configuration Tool

Some of the text that can be entered in configuration tool have default settings that you may wish to use:

Footer Links	
Footer Link 1: Text	en: Help
Footer Link 1: URL	:

You can use the default text as entered or you can enter your own customized text. There are a few rules that govern the use of default text.

1. If text appears above an empty box, such as in the illustration shown above, that text will be used, even if you do not enter text in the text box.

2. You can type any other text you wish in the text box. Even when you enter that text, the original default text is displayed above.

Footer Links	
Footer Link 1: Text	en: Help Assistance
Footer Link 1: URL	:

3. Once you have entered any text in a text box, the default text will not be automatically available, even if you delete the custom text you entered. If you want to use the default text, you can retype or copy and paste it into the text box.

Working With Text for Alerts Emails

COASP supports two types of alerts: alerts that users set up for themselves and security alerts, which are sent to users each time a change has been made in their personally identifiable information, such as their username or password. The configuration tool contains settings that define the content of those emails.

This is an example of a segment of an alerts email:
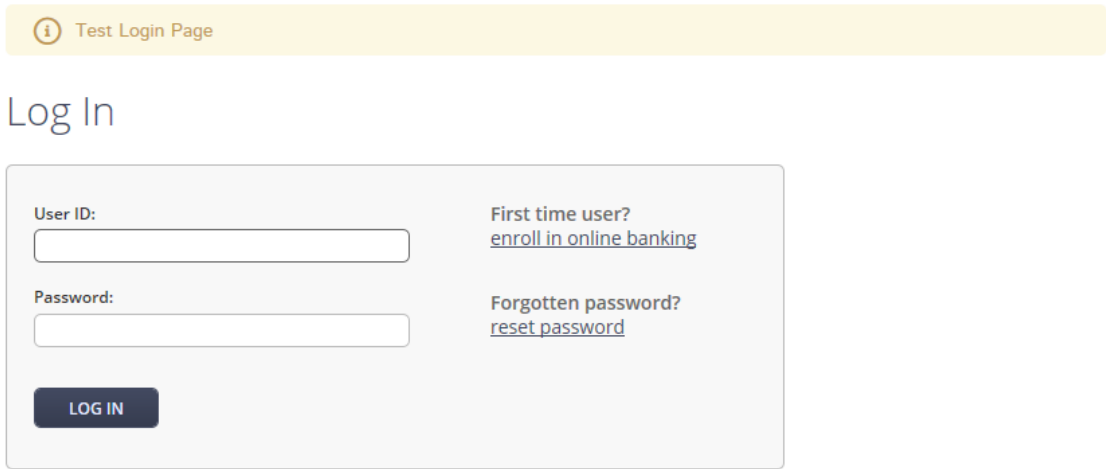
Secure Message Subscription	en: You have {0} secure message(s). Please log in to online banking to review those messages.

Notice that this message contains a variable: {0}. For this particular message, it is placeholder for the number of secure messages that the user has received. Many of the alerts message strings contain one or more of these variables. If you decide that you want to change some of the language used in a

message, be sure to not change or remove any of these variables. You can, if needed, always recopy the default text, as displayed in the area above the text box.

Working With Optional Page Messages

All pages and most lightboxes allow for an optional message to be displayed. These message can contain information specific to your financial institution or any other message or information. This is a sample of a page message on the main login page:

In addition to plain text, simple HTML markup can also be used, such as <strong> tag for bolding a word or phrase or the <i> tag for italics.

Understanding the Certification and Production Regions

When a new financial institution is added to Corillian Online ASP, hosting creates two distinct regions: Certification and Production.

The *Certification* region is a fully-functional installation of Corillian Online ASP that uses test regions for hosting and third-party providers. The financial institution uses the Certification region to configure all of the aspects of the online banking site, including the look and feel of the site, limits on transactions, how account information should be displayed, and much more, using the Configuration Tool. Installation administrators also use the Configuration Tool to create settings for the financial institution. Because this work is done in the Certification region, it can be reviewed and tested without affecting the public site, or *Production* region. Even after the site goes live in the Production region, the financial institution can use the Certification region to create and test changes. The Certification region is also a valuable tool for testing the site and the integration of the third-party providers.

When the financial institution is ready to start the pilot test of the online banking site, the Certification region is promoted to *Production*, which is the publicly available online banking site.

At any time, when the financial institution needs to update the site, it should:

1. Make the changes in the Certification region.

2. Review and test those changes in Certification.

3. Promote the Certification region to Production.

This diagram shows how this iterative process works:
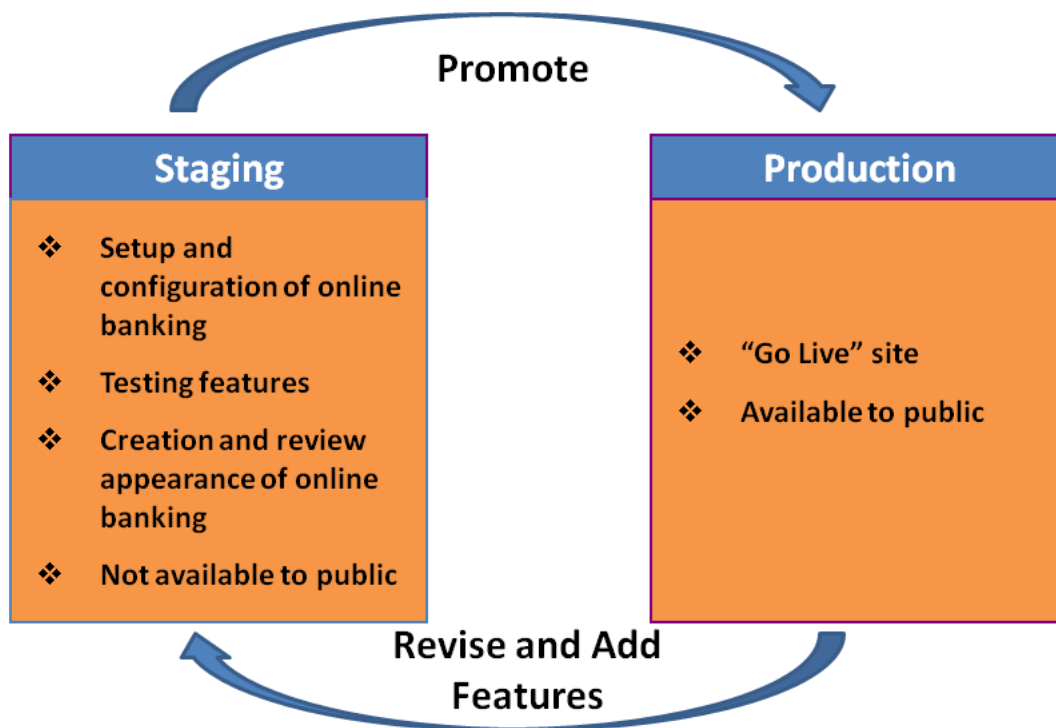
Defining the Look and Feel of the Online Banking Site

Creating the look and feel of the online banking site enables each financial institution to make changes to the site that support its branding. In addition to being able to use logos throughout the site, financial institutions can also define options used in the header, footer, navigation bars, tables and the page body.

About The Header

The header that you define here appears on every page in the online banking site. Each financial institution can use the configurable elements to support their own branding, including the colors used and the ability to upload its logo.

The header appears on each page, although not all of the content is shown on the login and logout pages. While the body section of the online banking page is set to a maximum width of 960 pixels, the header will automatically expand to fill the browser window, although the configurable elements in the header will be contained within the 960 pixels space.
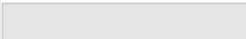

Number	Element	Description
1	Header Background Color	Choose the background color to use in the header. See *Working with Colors* for information about specifying colors in the configuration tool.
2	Define the appearance of the background header	The header can be a solid color or, if desired, use a gradient that starts with the Header Background Color. Gradients can start either at the top, bottom, left or right sides of the header; the bottom option is preferred for the best visual result. For more information about gradients, see *About Gradients*.
3	Link and Icon Color	The icons in the online banking site are designed to let you add an accent color to enhance the appearance of the icon. That same color is used for the links in the lower right corner of the header.
4	Message Alert Badge Color	Choose the color to use for the Message Alert Badge. The Message Alert Badge tells users how many unread secure messages are in their message queue. If there are no messages in the queue, the badge is not displayed.
5	Message Alert Badge Text Color	Choose the color for the text used with the Message Alert Badge. This text states the number of unread messages for the user.
6	FI Logo to Display in the Top Left Corner	Your financial institution's logo can be uploaded to the header. The maximum size of the logo used in the header is 200x600 pixels, though it can be smaller. The logo image you upload will be left aligned with the left

Number	Element	Description
		edge of the body. The system adds 25 pixels of padding above and below the header image. If your header logo is less than 200 pixels high, the height of the header will be automatically adjusted based on the height of the image. The minimum height of the header is 80 pixels. For information about how logos are resized in Corillian Online ASP, see *Working With Your Financial Institution's Logo*.

Configuring the Look and Feel of the Header

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Header** expand button ⊞.

The Header section opens.

4. Using the **Header Background Color** control, enter the color to use for the header background. For information about entering a color in the configuration tool, see *Working With Colors*.

5. Using the **Define the appearance of the background header** control, choose one these options:

Option	Description
None	Select **None** to use the solid color (defined in the previous step) for the header.
Top	Choose **Top** to use the gradient option that begins with the color defined in the previous step at the top of the header and fades to a lighter color at the bottom of the header. See *About Gradients* for more information.

Option	Description
Bottom	Choose **Bottom** to use the gradient option that begins with the color defined in the previous step at the bottom of the header and fades to a lighter color at the top of the header. This gradient option is recommended for the best results.
Left	Choose **Left** to use the gradient option that begins with the color defined in the previous step on the left side of the header and fades to a lighter color on the right side of the header.
Right	Choose **Right** to use the gradient option that begins with the color defined in the previous step on the right side of the header and fades to a lighter color on the left side of the header.

6. Use the **Link and Icon Color** control to define the color that will be used for the links included in the header as well as the accent color for icons.

7. Use the **Message Alert Badge Color** control to enter the color to be used in the circle part of the badge.

8. Use the **Message Alert Badge Text Color** control to enter the color of text used inside the badge.

9. Use the **FI Logo to Display in the Top Left Corner** control to add a logo to the header. To upload your logo, click the **Browse** button to navigate to the logo file on your computer; click OK to upload and use that version of the logo image. To delete the current logo, click the **Delete** button. If you want to use another version of your logo, delete the current version and then upload the newer version.

   👉 **Note:** Do not use the Delete button at this time. Instead, replace the image with another image, such as a small, transparent .GIF or .PNG file, if no graphic is needed.

10. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Defining the Look and Feel of the Navigation Bars

The online banking navigation bars are included just under the header and before the main body of the site. There are two type of navigation bars.

1. The primary navigation bar is displayed when the user is viewing an online banking page, such as the Accounts or Accounts Detail page. This navigation bar lists the other options available to the user.

2. The single-sign on navigation bar is displayed when the user is viewing a single-signon (SSO) page, such as Bill Pay or All Data. This navigation bar lists just the option to return to the main online banking site.

When you configure the look and feel of the two types of navigation bars, you may consider giving the SSO navigation bar a different look and feel from the primary navigation bar as a visual cue that the page they are viewing is not in your financial institution's online banking site.

About the Primary Navigation Bar

The navigation bar that you define here appears on every page in the online banking site. Each financial institution can use the configurable elements to support their own branding, including the colors used and the ability to upload their logo. There are two states for the navigation bar: one for normal online banking pages and another for single-signon applications, such as Bill Pay and All Data. This topic addresses the primary navigation bar.

The primary navigation bar appears on every page in online banking. While the body section of the online banking page is set to a maximum width of 960 pixels, the primary navigation bar background will automatically expand to fill the browser window, although the configurable elements in the navigation bar will be contained within the 960 pixels space.
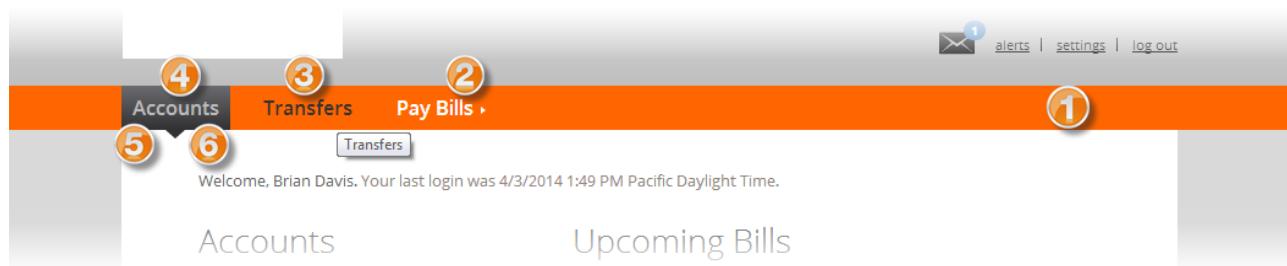
This table describes each of the configurable elements called out in this image.

Number	Element	Description
1	Navigation Bar Background Color	Choose the background color to use for the navigation bar background. See *Working with Colors* for information about specifying colors in the configuration tool.

Number	Element	Description
2	Link Color for Normal and Visited States	Choose the color for links in the normal and visited states. (In the previous diagram, the Pay Bills link is in this state.)
3	Hover Link Color	Choose the background color for a link in the hover state. (In the previous diagram, the Transfers link is in this state.)
4	Active Link Color	Choose the color for a link in the active state. (In the previous diagram, the Accounts link is in this state.)
5	Active Link Background Color	Choose the color for the background area for the active link.
6	Active Link Background Gradient	The active link background can be a solid color or, if desired, use a gradient that starts with the Active Link Background Color. Gradients can start either at the top or bottom; the bottom option is preferred for the best visual result. For more information about gradients, see *About Gradients*.

About the Single Signon Navigation Bar

This topic eescribes the configurable elements in the single-signon navigation bar and provides instructions for configuring those elements using the configuration tool.

The SSO navigation bar appears on pages when a full-page single sign-on application is in use, such as Bill Pay or AllData. It has a difference appearance than the primary navigation bar

This table describes each of the configurable elements referred to in the previous image.

Number	Element	Description
1	Navigation Bar Background Color	Choose the background color to use for the SSO navigation bar background. See *Working with Colors* for information about specifying colors in the configuration tool.
2	Navigation Bar Background Gradient	The SSO navigation background can be a solid color or, if desired, a gradient that starts with the SSO Navigation Background Color. Gradients can start either at the top or bottom; the bottom option is preferred for

Number	Element	Description
		the best visual result. For more information about gradients, see *About Gradients*.
3	Link Color for Normal and Visited States	Choose the color for the link in its normal and visited state. There is only one link on the SSO navigation bar.
4	Hover Link Color	Choose the background color for the link in the hover state.

Configuring the Look and Feel of the Single Signon Navigation Bar

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Navigation Bar** expand button ⊞.
The Navigation Bar section opens.

⊟ **Navigation Bar**

Primary Navigation Bar	Use these configuration options to specify the colors of the tabs and links for the navigation bar.
Navigation Bar Backgound Color	#ff6600
Link Color for Normal And Visited States	#FFFFFF
Hover Link Color	#333333
Active Link Color	#bbbbbb
Active Link Background Color	#333333
Active Link Background Gradient Choose a gradient option or select None. All options use the solid color defined in Header Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	○ Top ◉ Bottom (recommended) ○ None
SSO Navigation Bar	Use these configuration options to specify the colors of the tabs and links for the navigation bar. These settings apply once to an SSO tab such as Bill Pay or AllData.
Navigation Bar Backgound Color	#666666
Navigation Bar Background Gradient	○ Top ◉ Bottom (recommended) ○ Left ○ Right ○ None
Link Color for Normal And Visited States	#FFFFFF
Hover Link Color	#dcdcdc

4. Locate the SSO Navigation Bar subsection in the Navigation Bar section.

5. Using the **Navigation Bar Background Color** control, enter the color to use for the SSO navigation bar background color. See *Working With Colors* for more information.

6. Using the **Navigation Bar Background Color** control, choose one of these options:

Option	Description
Top	Choose **Top** to use the gradient option that begins with the color defined in the previous step at the top of the header and fades to a lighter color at the bottom of the SSO navigation bar. See *About Gradients* for more information.
Bottom	Choose **Bottom** to use the gradient option that begins with the color defined in the previous step at the bottom of the navigation bar and fades to a lighter color at the top of the SSO navigation bar. This gradient option is recommended for the best results.
Left	Choose **Left** to use the gradient option that begins with the color defined in the previous step on the left side of the SSO navigation bar and fades to a lighter color on the right side of the SSO navigation bar. See *About Gradients* for more information.
Right	Choose **Right** to use the gradient option that begins with the color defined in the previous step on the right side of the SSO navigation bar and fades to a lighter color on the left side of the SSO navigation bar. See *About Gradients* for more information.
None	Select **None** to use the solid color (defined in the previous step) for the SSO navigation bar.

7. Using the **Link Color for Normal and Visited States**, enter the color to use for the link when it is in this state.

8. Using the **Hover Link Color** control, enter the color to use for the link when it is this state.

9. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

   Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

**Defining the Look and Feel of the Page Body**

The online banking site has several pages that include various types of content including account information, account detail information, transfers and more. There are numerous elements included on body pages which can be configured.

Because there are numerous elements that can be configured, the information is grouped according to logical use and location in the site.

About the General Page Items

The General Page Items discussed here affect every page in the online banking site (except that fully-integrated single-signon pages, such as those for Bill Pay and AllData, do not use the Page Title when displaying their content).

This image shows these configurable elements:
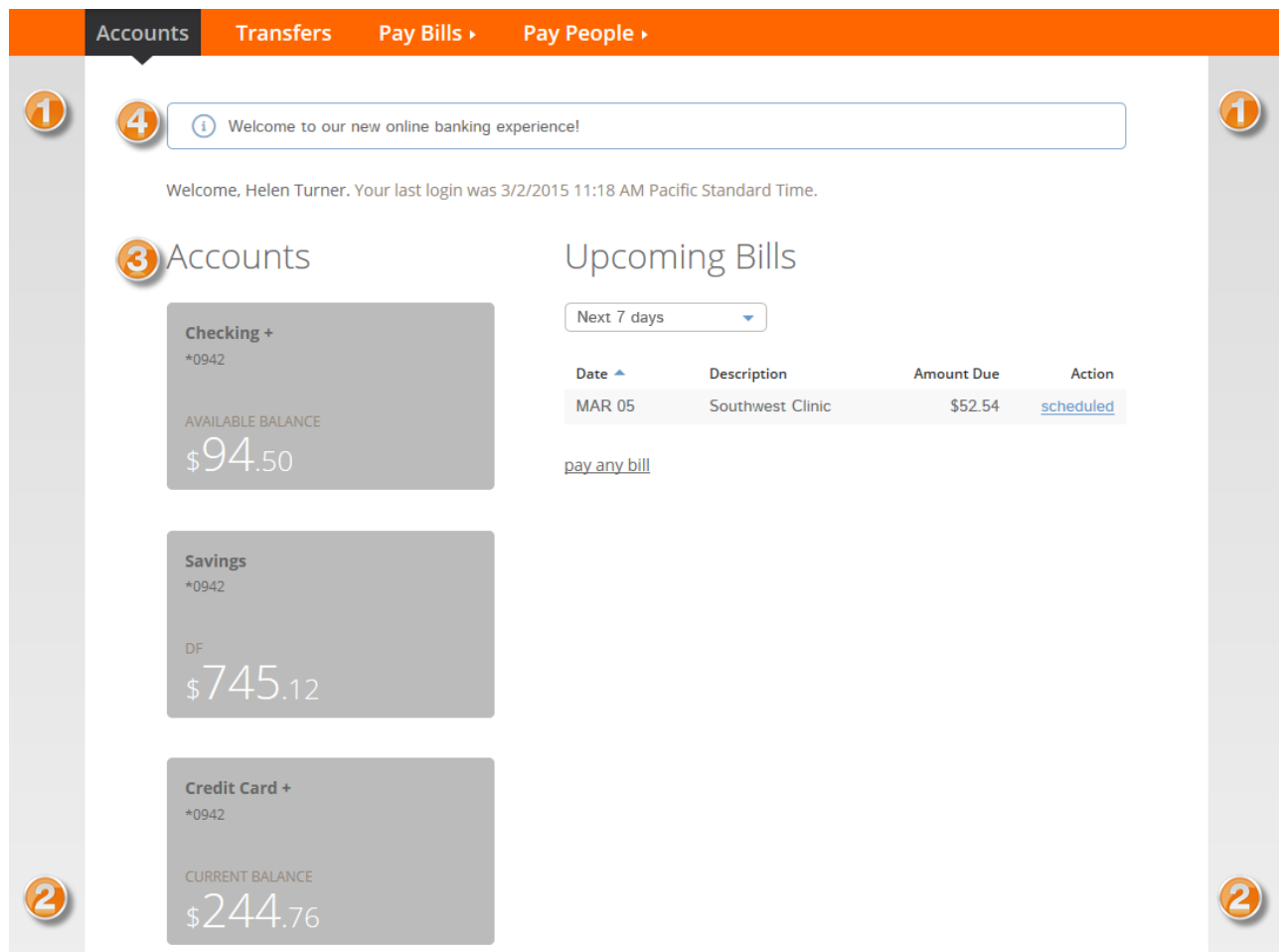
This table describes the elements that are called out in the previous image.

Number	Element	Description
1	Outer Page Background Color	Every page in the online banking site contains all information in a 960 pixel wide space. When the user's browser window is wider than 960 pixels, an outer background color is used to symmetrically fill the extra space. Choose the color to fill this space. See *Working With Colors* for information about specifying colors.
2	Outer Page Background Gradient	The outer section can be a solid color or, if desired, use a gradient that starts with the Outer Page Background Color. Gradients can start either at the top, bottom, left or right sides of the header; the bottom option is preferred for the best visual result. For more information about gradients, see *About Gradients*.
3	Page Title Font Color	Choose the color for the title on each page. Note that only the color used for the page title may be changed; the size and style of the page title is preset.
4	Page Message Border and Icon Color	Choose the color for the optional page message box border and icon.

Configuring the Look and Feel of General Page Items

This tasks defines the steps needed to configure the look and feel of the general page items used on all pages in online banking.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
The Body section opens.

Body		
Outer Page Background Color	#d9d9d9	
Outer Page Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	● Top (recommended) ○ Bottom ○ Left ○ Right ○ None	
Page Title Font Color	#666666	
Page Message Border and Icon Color	#88aacc	
Account Tile	Use this section to set the colors used for Account Tiles.	
Account Tile Background Color	#bbbbbb	
Account Tile Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	○ Top ● Bottom (recommended) ○ Left ○ Right ○ None	
Account Tile Border Color	#bbbbbb	
FI Logo to Display in the Top Right Corner of the Tile	Browse... Delete	
Account Name And Number Font Color	#666666	
Balance Type Font Color	#94877a	
Balance Font Color	#ffffff	
Contextual Links	Use this section to set the colors used for Links.	
Link Color for Normal, Active and Visited States	#666666	
Link Color for Hover State	#333333	
Tables	Use this section to specify the look and feel options for tables used in online banking, such as the transactions table on the Account Details page.	
Table Link for Normal, Active and Visited States.	#6699cc	
Table Link Color for Hover State	#1459ff	
Buttons	Buttons are used to submit actions throughout the site, such as the Review button on the Transfer Money page.	
Button Border Color	#666666	
Button Font Color	#ffffff	
Button Background Color	#6699cc	
Icons	Icons are used throughout the site to highlight functionality, such as the calendar icon associated with the date picker control.	
Icon Color	#6699cc	

4. Using the **Outer Page Background Color** control, specify a color for the outer page background. See *Working With Colors* for information about specifying colors.

5. Using the **Outer Page Background Color Gradient** control, choose one these options:

Option	Description
None	Select **None** to use the solid color (defined in the previous step) for the outer page background.

Option	Description
Top	Choose **Top** to use the gradient option that begins with the color defined in the previous step at the top of the outer page background and fades to a lighter color at the bottom of the outer page background. See *About Gradients* for more information.
Bottom	Choose **Bottom** to use the gradient option that begins with the color defined in the previous step at the bottom of the outer page background and fades to a lighter color at the top of the outer page background. This gradient option is recommended for the best results.
Left	Choose **Left** to use the gradient option that begins with the color defined in the previous step on the left side of the outer page background and fades to a lighter color on the right side of the outer page background
Right	Choose **Right** to use the gradient option that begins with the color defined in the previous step on the right side of the outer page background and fades to a lighter color on the left side of the outer page background.

6. Using the **Page Title Font Color** control, choose a color for page titles.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Account Tiles

When selected as the preferred display format, all the user's accounts are represented on the initial Account page by account tiles. The configurable elements of account tiles are described here.

The accounts are ordered according to account groups, which are determined on the Account Groups tab in the configuration tool. See *Creating Account Groups* for more information about how account groups control the order of the account tiles on the Accounts page.

Account tiles contain the name or nickname for the account, the account number (with masking as defined by each financial institution), and the balance.


This table describes each of the configurable elements used on the account tile.

Number	Element	Description
1	Account Tile Background Color	Choose the background color for the tile. See *Working with Colors* for information about specifying colors.
2	Account Tile Background Gradient	The account tile can be a solid color or, if desired, use a gradient that starts with the Account Tile Background Color. Gradients can start either at the top, bottom, left or right sides of the account tile; the bottom option is preferred for the best visual result. For more information about gradients, see *About Gradients*.
3	Account Tile Border Color	Choose a color for the thin outline used as a border for the account tile.
4	FI Logo to Display in the Top Right Corner of the Tile	Your financial institution's (FI) logo can be displayed on each account tile, if desired. A space of 80 x 80 pixels is reserved for the display of the logo. For more information about using your FI's logo in the online banking site, see *Working with Your Financial Institution's Logo*.
5	Account Tile Primary Label Color	Choose the font colors for the primary and secondary labels. See *Configuring the Look and Feel of Account Tiles*.
6	Account Tile Secondary Label Color	

Selecting Account Tiles

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
   The Body section opens.

4. Locate the **Account Overview Page** subsection and select **Tiles**.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Configuring the Look and Feel of Account Tiles

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
   The Body section opens.

4. Locate the **Account Tile** subsection in the Body section.

⊟ **Body**			
Account Tile	Use this section to set the colors used for Account Tiles.		
Account Tile Background Color	#bbbbbb		?
Account Tile Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	○ Top ◉ Bottom (recommended) ○ Left ○ Right ○ None		?
Account Tile Border Color	#bbbbbb		?
FI Logo to Display in the Top Right Corner of the Tile		Browse... Delete	?
Account Name And Number Font Color	#666666		?
Account Tile Primary Label Color	#ffffff		?
Account Tile Secondary Label Color	#807d81		?

5. Using the **Account Tile Background Color** control, enter the color to use for the account tile background. For information about entering a color in the configuration tool, see *Working With Colors*.

6. Using the **Account Tile Background Gradient** control, choose one these options:

Option	Description
None	Select **None** to use the solid color (defined in the previous step) for the account tile.
Top	Choose **Top** to use the gradient option that begins with the color defined in the previous step at the top of the account tile and fades to a lighter color at the bottom of the header. See *About Gradients* for more information.
Bottom	Choose **Bottom** to use the gradient option that begins with the color defined in the previous step at the bottom of the account tile and fades to a lighter color at the top of the account tile. This gradient option is recommended for the best results
Left	Choose **Left** to use the gradient option that begins with the color defined in the previous step on the left side of the account tile and fades to a lighter color on the right side of the account tile.
Right	Choose **Right** to use the gradient option that begins with the color defined in the previous step on the right side of the account tile and fades to a lighter color on the left side of the account tile.

7. Use the **FI Logo to Display in the Top Right Corner of the Tile** control to add a logo to the account tile. To upload your logo, click the **Browse** button to navigate to the logo file on your computer; click OK to upload and use that version of the logo image.

   ☞   **Note:** Do not use the Delete button at this time. Instead, replace the image with another image, such as a small, transparent .GIF or .PNG file, if no graphic is needed.

8. Do the following:

   a) Type an **Account Tile Primary Label Color** in the text box or use the *color picker* to choose one.

   b) Type an **Account Tile Secondary Label Color** in the text box or use the *color picker* to choose one.

9. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

   Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Account Tile Primary Labels

Account tile labels display the account name or nickname, the account number (with masking as defined by each financial institution), and one or two balances, depending on account type. The elements of the primary and secondary labels are configurable. Primary labels are described here.
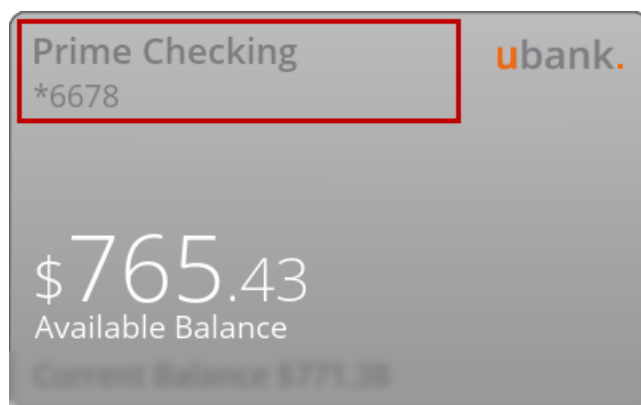
Account Types on Primary Labels

At the time of this writing, primary label configuration choices include the account types listed in the following table.

AvailableBalance	The amount currently available in the account.
CurrentBalance	The current balance in the account.

Related information
Account Tile Secondary Labels
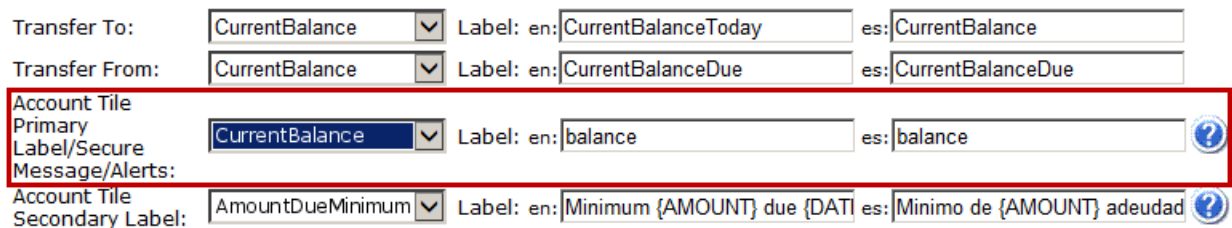
Configuring Account Tile Primary Labels

When tiles are selected as the account display format, primary tile labels are configured according to account type selected.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Click **Add Asset Account Type** or **Add Liability Account Type** ✚.

4. Locate **Tiles and Dropdown Lists**.

5. Choose a balance type from the **Account Tile Primary Label/Secure Message/Alerts** drop-down list on the left.

- AvailableBalance

- CurrentBalance

The label text boxes on the right, **Label: en:** and **Label: es:**, are automatically filled according the choice of balance type made above.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Account Tile Secondary Labels

Account tile labels display the account name or nickname, the account number (with masking as defined by each financial institution), and one or two balances, depending on account type. The elements of the primary and secondary labels are configurable. Secondary labels, described here, display the second account balance, when available.
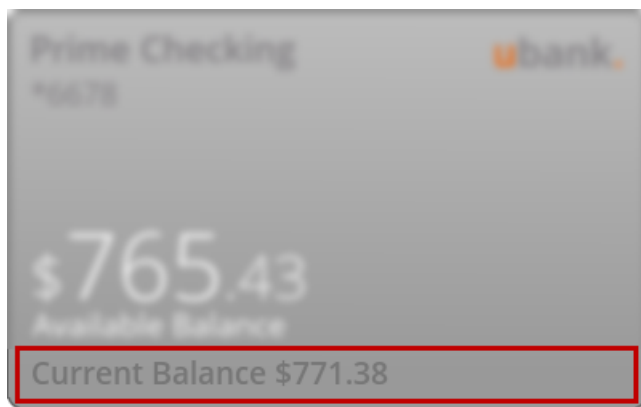
Tokens

What are tokens? For some account types displayed on account tiles, secondary labels use units of text called tokens (primary labels do not use tokens). Tokens represent units of account data, such as an amount or a date, that are obtained from the financial institution's system. Corillian Online automatically replaces tokens with appropriate data for display on the account tiles. Tokens, along with accompanying text, form the secondary labels on the account tiles of those accounts that support them.

Default use of tokens. Tokens are used in default phrases, as illustrated below. In the phrase **Minimum {AMOUNT} due {DATE}**:

*   {Amount} causes the system to enter the appropriate dollar amount.

*   {Date} causes the system to enter the payment date associated with that amount.

Tiles and Dropdown Lists

Transfer To:	CurrentBalance ⌄	Label: en: CurrentBalanceToday	es: CurrentBalance
Transfer From:	CurrentBalance ⌄	Label: en: CurrentBalanceDue	es: CurrentBalanceDue
Account Tile Primary Label/Secure Message/Alerts:	CurrentBalance ⌄	Label: en: balance	es: balance ?
Account Tile Secondary Label:	AmountDueMinimum ⌄	Label: en: Minimum {AMOUNT} due {DATE	es: Minimo de {AMOUNT} adeudad ?

☞ **Note:** At the time of this writing, {AMOUNT} and {DATE} are the only tokens in use.

Custom use of tokens. Custom labels can be created with or without the use of tokens. Labels without tokens display only text, not account data. However, to display a phrase that includes a dollar amount and/or a date in the label text, use the {Amount} and {Date} tokens.

For example, this slightly friendlier phrase could be entered in the **Label: en:** textbox to replace the default:

```
The amount of {AMOUNT} is due on {DATE}.
```

This might appear as illustrated below:

$640.35

Balance

The amount of $20.00 is due on May 11.
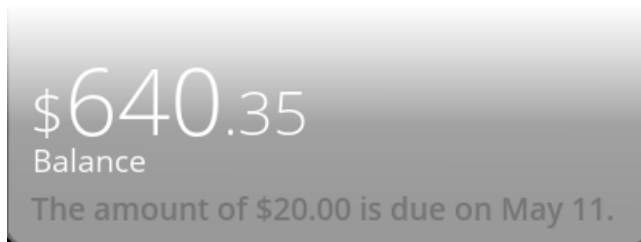
☞ **Tip:**
Here are a few points to remember about using tokens in account tile secondary labels:

- A token consists of a keyword inside curly braces and must be spelled exactly.

- For custom use, tokens must be inserted manually.

- The selected account type must support their use.

- The only tokens available are {Amount} and {Date}.

- Dates are displayed in the format MMM dd (month and day without the year).

- To reset the default label text, reselect an account type from the drop-down list.

Account Types on Secondary Labels

At the time of this writing, secondary label configuration choices include the account types listed in the following table.

None (empty)	The secondary label is disabled; only the primary label is displayed.	
AvailableBalance	The amount currently available in the account. Automatically displayed when the selected primary label value is Current Balance.	These labels display dollar values and do not use tokens.
CurrentBalance	The current balance in the account. Automatically displayed when the selected primary label value is Available Balance.	
Minimum Amount Due	The minimum amount due with the next payment. Minimum {AMOUNT} due {DATE}	These labels use tokens and are customizable.
Payment Amount Due	The amount due with the next payment. Payment {AMOUNT} due {DATE}	

Related information

Account Tile Primary Labels

Configuring Account Tile Secondary Labels

When tiles are selected as the account display format, secondary tile labels are configured according to account type selected or can be customized or disabled.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Click **Add Asset Account Type** or **Add Liability Account Type** ✚.

4. Locate **Tiles and Dropdown Lists**.

5. Choose a balance type from the drop-down list on the left.

6. In the English (en:) and Spanish (es:) text boxes on the right, do one of the following:

- Accept the default label text.

- Edit the label text.

> 👉 **Note:** The label text boxes on the right, **Label: en:** and **Label: es:**, are automatically filled according the choice of balance type made above. To restore the default label text after editing, click the drop-down list and re-select a balance type.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Account Lists

When selected as the preferred display format, all the user's accounts are represented on the initial Account page by account lists. The configurable elements of account lists are described here.

The accounts are ordered according to account groups, which are determined on the Account Groups tab in the configuration tool. See *Creating Account Groups* for more information.

Account lists contain the name or nickname for the account, the account number (with masking as defined by each financial institution), and the balance.

This table describes each of the configurable elements used on the account tile.

Number	Element	Description
1	Icon Toggle	Switch between Account Tiles and Account Lists.
2	Asset Account List	The list of asset accounts and account numbers.
3	Asset Account Balances	Balances of each asset account individually.
4	Asset Account Total	Total of all asset accounts combined.
5	Liability Account List	The list of liability accounts and account numbers.
6	Liability Account Balances	Balances of each liability account individually.
7	Liability Account Total	Total of all liability accounts combined.

Selecting Account Lists

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
The Body section opens.

4. Locate the **Account Overview Page** subsection and select **List**.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Configuring Account Lists

When lists are selected as the account display format, the types of balances to be displayed are enabled according to asset and liability account types.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞ .
The Body section opens.

4. Locate **Account Overview Page**.

5. To the right of **Asset Table Columns in List View**, do the following:
- Select the check box to enable the balance type.

- Clear the check box to disable the balance type.

6. To the right of **Liability Table Columns in List View**, do the following:
- Select the appropriate check boxes to enable selected balance types.

- Clear the appropriate check boxes to disable selected balance types.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Contextual Links

This topic describes the configurable elements use in contextual links. Contextual links appear on the Account Details page when a user is viewing the details of a specific account. On the right side of the account tile, there may be one or more links to features or services associated with that type of account. Examples include access to eStatements, the ability to stop payment on a check and initiate a funds transfer.

There are two ways a contextual link can appear. Links that are in a normal, active or already visited state all share the same appearance. A link that the user is hovering over has another appearance.

The following table describes the configurable elements used in contextual links.

Number	Element	Description
1	Link Color for Normal, Active and Visited States	Choose the color for all links that are not currently being hovered over. See *Working with Colors* for information about specifying colors.
2	Link Color for Hover State	Choose the color for a link that user is hovering over. Note that, at least in some browsers, a tool tip with content of the link may also display.

Configuring the Look and Feel for Contextual Links.

This topic contains the instructions to use in order to configure the contextual links.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
The Body section opens.

⊟ Body		
Outer Page Background Color	#d9d9d9 ▭	❓
Outer Page Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	◉ Top (recommended) ◯ Bottom ◯ Left ◯ Right ◯ None	
Page Title Font Color	#666666 ▭	❓
Account Tile		
Account Tile Background Color	#bbbbbb ▭	❓
Account Tile Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	◯ Top ◉ Bottom (recommended) ◯ Left ◯ Right ◯ None	❓
Account Tile Border Color	#bbbbbb ▭	❓
FI Logo to Display in the Top Right Corner of the Tile	ubank.	❓
Account Name And Number Font Color	#666666 ▭	❓
Balance Type Font Color	#94877a ▭	❓
Balance Font Color	#ffffff ▭	❓
Contextual Links		
Link Color for Normal, Active and Visited States	#666666 ▭	❓
Link Color for Hover State	#333333 ▭	❓
Tables		
Table Link for Normal, Active and Visited States.	#6699cc ▭	❓
Table Link Color for Hover State	#1459ff ▭	❓
Buttons		
Button Border Color	#666666 ▭	❓
Button Font Color	#ffffff ▭	❓
Button Background Color	#6699cc ▭	❓
Icons		
Icon Color	#434A61 ▭	❓

4. Locate the Contextual Links section.

5. Using the **Link Color for Normal, Active and Visited States** control, enter the color to use for this style of contextual link. See *Working with Colors* for information about specifying colors.

6. Using the **Link Color for Hover State** control, enter the color to use for this style of contextual link.

7. When you are finished, you can:

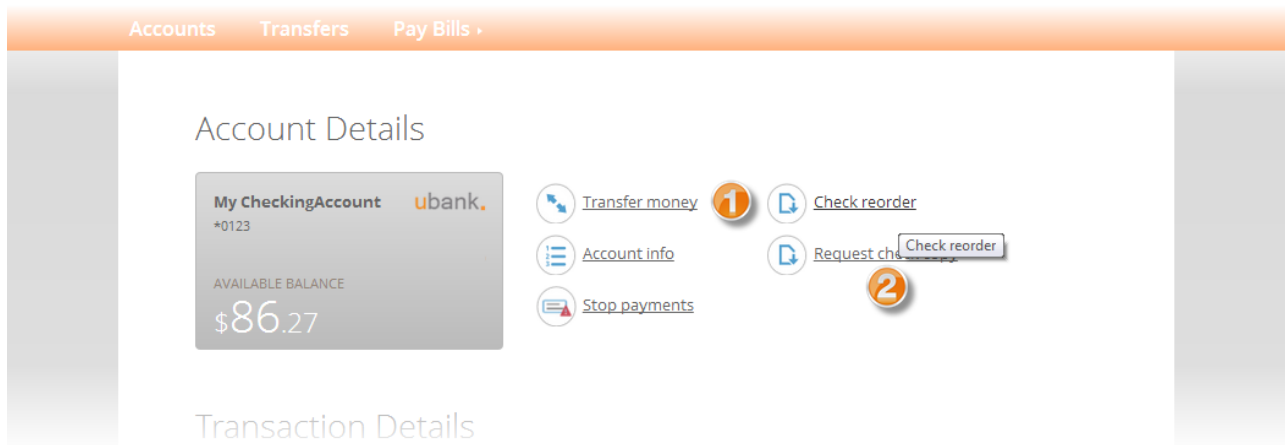| Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Buttons and Icons

This topic describes the configurable elements for button and icons in the online banking site. The online banking site uses buttons for users to click when performing tasks in online banking. Icons are used on the Account Details page in conjunction with contextual links. The icons are designed to provide a visual cue for the type of action being performed.

Buttons and icons may be configured with colors which can be coordinated, for example, with the colors in your logo to help provide a unified appearance in the online banking site.
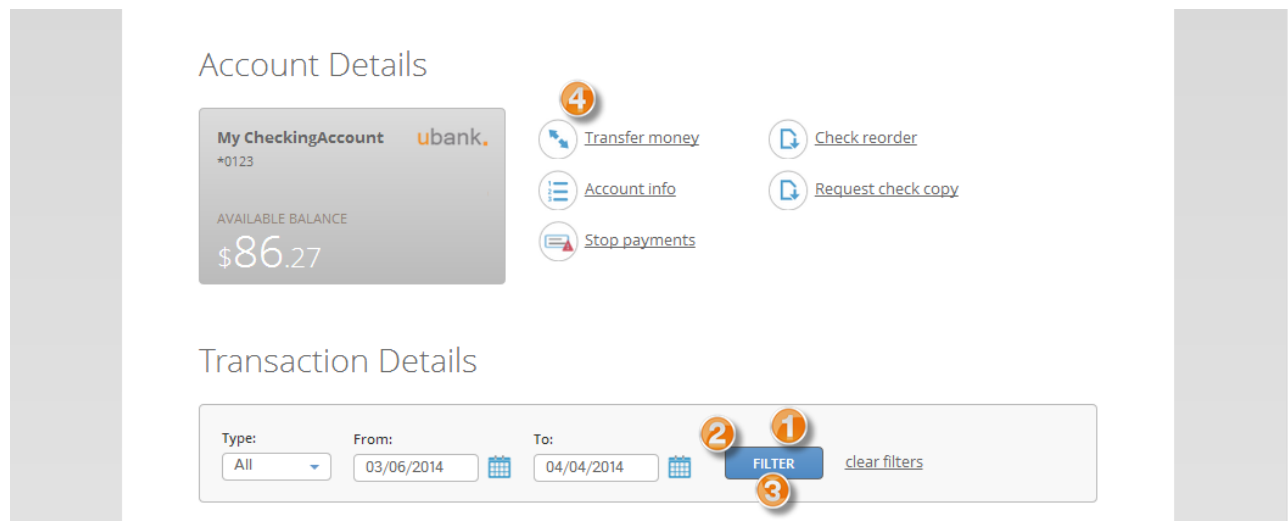
This table describes each of the configurable elements used with buttons and icons.

Number	Element	Description
1	Button Border Color	Choose a color for the thin outline for the button border. For information about entering a color in the configuration tool, see *Working With Colors*.
2	Button Font Color	Choose a color for the font used with buttons.
3	Button Background Color	Choose a background color for buttons.

Number	Element	Description
4	Icon Color	Choose the accent color to use in the icons associated with contextual links.

Configuring the Look and Feel of Buttons and Icons

Follow these steps to configure the look and feel of buttons and icons

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.
   The Body section opens.

Body			
Outer Page Background Color	#d9d9d9	—	?
Outer Page Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	◉ Top (recommended) ◯ Bottom ◯ Left ◯ Right ◯ None		
Page Title Font Color	#666666	—	?
Account Tile			
Account Tile Background Color	#bbbbbb	—	?
Account Tile Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	◯ Top ◉ Bottom (recommended) ◯ Left ◯ Right ◯ None		?
Account Tile Border Color	#bbbbbb	—	?
FI Logo to Display in the Top Right Corner of the Tile	ubank.		?
Account Name And Number Font Color	#666666	—	?
Balance Type Font Color	#94877a	—	?
Balance Font Color	#ffffff	—	?
Contextual Links			
Link Color for Normal, Active and Visited States	#666666	—	?
Link Color for Hover State	#333333	—	?
Tables			
Table Link for Normal, Active and Visited States.	#6699cc	—	?
Table Link Color for Hover State	#1459ff	—	?
Buttons			
Button Border Color	#666666	—	?
Button Font Color	#ffffff	—	?
Button Background Color	#6699cc	—	?
Icons			
Icon Color	#434A61	—	?

4. Locate the Buttons subsection in the Body section.

5. Using the **Button Border Color** control, enter the color to use for the thin outline used as a border on all buttons. For information about entering a color in the configuration tool, see *Working With Colors*.

6. Using the **Button Font Color** control, enter the color to use for font color for all buttons.

7. Using the **Button Background Color** control, enter the color to use as the background color for all buttons.

8. Locate the Icons subsection in the Body section.

9. Using the **Icon Color** control, enter the color to use as an accent color on all icons associated with contextual links.

**10.** When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Tables

Tables are used on several pages in the online banking site, including Account Details and Transfers pages. While the general appearance of the tables is preset, the links used in tables to perform actions, such as launching a light box with details about a transaction, may be configured.

There are two ways a link in a table can appear. Links that are in a normal, active or already visited state all share the same appearance. A link that the user is hovering over has another appearance. Other than these two link options, there are no other configurable elements for tables.

Past Transactions

Date ▼	Description		Amount	Balance
APR 2	Electronic Transfer		$3.00	-$0.99
APR 2	Electronic Transfer	①	+$2.01	$2.01
MAR 31	Electronic Transfer		+$3.23	$85.24
MAR 31	Electronic Transfer	②	+$90.00	$82.01
MAR 31	Electronic Transfer		$3.00	-$7.99
MAR 31	Electronic Transfer		$4.00	-$4.99
MAR 21	Electronic Transfer		+$1.00	$84.24
MAR 21	Electronic Transfer		+$1.00	$83.24
MAR 21	Electronic Transfer		$3.00	$82.24
MAR 18	Electronic Transfer		$5.00	-$24.76
MAR 18	Electronic Transfer		$21.00	-$19.76
MAR 18	Electronic Transfer		$21.00	$1.24
MAR 18	Electronic Transfer		+$1.00	$22.24
MAR 18	Electronic Transfer		$21.00	$21.24
MAR 18	Electronic Transfer		$21.00	$42.24
MAR 18	Electronic Transfer		$21.00	$63.24
MAR 14	Electronic Transfer		$2.00	-$26.76
MAR 12	Electronic Transfer		$3.00	-$29.76

This table describes the configurable elements used in tables.

Number	Element	Description
1	Table Link for Normal, Active and Visited States	Choose the color for all links in a table that are not currently being hovered over. See *Working with Colors* for information about specifying colors.
2	Table Link Color for Hover State	Choose the color for a table link that user is hovering over.

Configuring the Look and Feel of Tables

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Body** expand button ⊞.

The Body section opens.

Body			
Outer Page Background Color	#d9d9d9	—	❷
Outer Page Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	⦿ Top (recommended) ◯ Bottom ◯ Left ◯ Right ◯ None		
Page Title Font Color	#666666	—	❷
Account Tile			
Account Tile Background Color	#bbbbbb	—	❷
Account Tile Background Gradient Choose a gradient option or select None. All options use the solid color defined in Navigation Bar Background Color. Gradients use that color as the darkest starting color. The lighter color in the gradient is automatically chosen.	◯ Top ⦿ Bottom (recommended) ◯ Left ◯ Right ◯ None		❷
Account Tile Border Color	#bbbbbb	—	❷
FI Logo to Display in the Top Right Corner of the Tile	ubank.		❷
Account Name And Number Font Color	#666666	—	❷
Balance Type Font Color	#94877a	—	❷
Balance Font Color	#ffffff	—	❷
Contextual Links			
Link Color for Normal, Active and Visited States	#666666	—	❷
Link Color for Hover State	#333333	—	❷
Tables			
Table Link for Normal, Active and Visited States.	#6699cc	—	❷
Table Link Color for Hover State	#1459ff	—	❷
Buttons			
Button Border Color	#666666	—	❷
Button Font Color	#ffffff	—	❷
Button Background Color	#6699cc	—	❷
Icons			
Icon Color	#434A61	—	❷

4. Locate the Tables section.

5. Using the **Table Link for Normal, Active and Visited States** control, enter the color to use for this style of link. See *Working with Colors* for information about specifying colors.

6. Using the **Table Link Color for Hover State** control, enter the color to use for this style of link.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About the Appearance of the Footer

The footer appears at the bottom of every page in the online banking site. The footer may contain a marketing ad, links defined by the financial institution and a copyright statement.

The following table describes each of the configurable elements used in the footer.

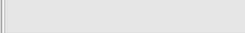| Number	Element	Description
1	Footer Background Color	Choose the background color to use in the footer. See *Working with Colors* for information about specifying colors in the configuration tool.
2	Footer Background Gradient	The footer can be a solid color or, if desired, use a gradient that starts with the Footer Background Color. Gradients can start either at the top, bottom, left or right sides of the footer; the bottom option is preferred for the best visual result. For more information about gradients, see *About Gradients*.
3	Footer Link Color	Choose the color to use for links contained in the footer. Note that these links are automatically underlined.
4	Footer Text Color	Choose the color to use for the copyright statement in the footer.
5	Footer Certification Image	An image containing one or more logos for the financial institution's affiliations can be uploaded and placed in the footer. The space for the footer certification is 280 pixels wide by 100 pixels high. If the uploaded image is

Number	Element	Description
		larger in one or both dimensions, the image will be automatically resized to fit in this space while maintaining the aspect ratio.

👉 **Note:** For information about adding footer links, see *Creating Links to Appear in the Footer*.

Configuring the Look and Feel of the Footer

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Look & Feel** tab.

3. Click the **Footer** expand button ⊞.
   The section opens.

4. Use the **Footer Background Color** control to enter the color to use for the footer background. For information about entering a color in the configuration tool, see *Working With Colors*.

5. Use the **Footer Background Color** control to choose one these options:

Option	Description
None	Select **None** to use the solid color (defined in the previous step) for the footer.
Top	Choose **Top** to use the gradient option that begins with the color defined in the previous step at the top of the footer and fades to a lighter color at the bottom of the footer. See *About Gradients* for more information.
Bottom	Choose **Bottom** to use the gradient option that begins with the color defined in the previous step at the bottom of the footer and fades to a lighter color at the top of the footer. This gradient option is recommended for the best results.

Option	Description
Left	Choose **Left** to use the gradient option that begins with the color defined in the previous step on the left side of the footer and fades to a lighter color on the right side of the footer.
Right	Choose **Right** to use the gradient option that begins with the color defined in the previous step on the right side of the footer and fades to a lighter color on the left side of the footer.

6. Use the **Footer Link Color** control to enter the color to use for all links contained in the footer.

7. Use the **Footer Text Color** control to enter the color to use for the copyright text in the footer.

8. Use the **Footer Certification Image** control to add an image that contains one or more certification images to the footer. To upload an image, click the **Browse** button to navigate to the image file on your computer; click **OK** to upload and use that version of the image.

> ☞ **Note:** Do not use the Delete button at this time. Instead, replace the image with another image, such as a small, transparent .GIF or .PNG file, if no graphic is needed.

9. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Defining Settings for the Online Banking Site

Topics in this section include information on adding information about a financial institution, setting transaction limits for transfers, selecting secure message subjects, defining a password policy, and defining how account numbers should be masked when displayed online, among others.

Entering Site-Wide Financial Institution Data

Financial institutions enter information, such as addresses and support telephone numbers, that are used to populate informational and error messages in online banking. Certain items of information can

be displayed through use a string macro. This is the technique used to automatically insert the customer support telephone number throughout the site, for example.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Site-Wide Financial Institution** expand button ⊞.
The Site-Wide Financial Institution Info section opens.

⊟ Site-Wide Financial Institution info	
Financial Institution's Name	U Bank !
Financial Institution's Support Phone Number	800-000-0000
Financial Institution's Address Line 1	3400 My Address Ln
Financial Institution's Address Line 2	
Financial Institution's City	MyCity
Financial Institution's State	Oregon ⌄
Financial Institution's ZIP Code	99999
Financial Institution's Customer Service Phone Number	503-987-6544
Financial Institution's E-mail Address	update@me.please
Financial Institution's Web Site	http://update.me.plz
Financial Institution's Online Banking Site Name	UpdateMe!
Financial Institution's Mobile Short Code	39872

4. Enter the following information about the financial institution:

Setting	Description
Financial Institution's Name	Enter the full name of the financial institution, such as The First National Bank of Portland or Portland Federal Credit Union. This setting can be retrieved in text using the macro `[=tenant:Name]`.
Financial Institution's Support Phone Number	Enter the general support telephone number for the financial institution.
Financial Institution's Address Line 1	Enter the first line of the mailing address for the financial institution.
Financial Institution's Address Line 2	Enter the second line of the mailing address, if needed.

Setting	Description
Financial Institution's City	Enter the city associated with the financial institution's mailing address.
Financial Institution's State	Enter the state associated with the financial institution's mailing address.
Financial Institution's ZIP Code	Enter the ZIP code for the financial institution's mailing address.
Financial Institution's Customer Service Phone Number	Enter the customer service telephone number for the financial institution. This setting can be automatically added to text or error messages using the string macro `[=tenant:CustomerServicePhoneNumber]`
Financial Institution's Email Address	Enter the email address for the financial institution.
Financial Institution's Web Site	Enter the fully-qualified URL for the financial institution's website. This setting can be automatically added to text or error messages using the string macro `[=tenant:HomepageUrl].`
Financial Institution's Online Banking Site Name	Enter the financial institution's name for the online banking site.
Financial Institution's Mobile Short Code	This setting is used only for those financial institutions who are implementing out-of-band authentication (OOBA). If the financial institution is using OOBA, enter the mobile short code used.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Selecting Secure Message Subjects

Corillian Online ASP (COASP) uses secure messages to facilitate communication between customers or members and the support staff of the financial institution. Secure message subjects are an important part of the secure message solution. By using a pre-defined selection of secure message topics, the COASP workflow system can automatically route messages to the person(s) deemed best able to manage inquiries about a particular subject.

For more information about the COASP workflow system, please refer to the *Relationship Manager Guide*.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Secure Message Subject** expand button ⊞ .
   The Secure Message Subject section opens.

⊟ Secure Message Subjects		
Account Information Request	☑	❓
Account Problem	☑	❓
ATM / Check Card Request	☑	❓
Dispute Transaction	☑	❓
Funds Transfer Inquiry	☑	❓
General Information Request	☑	❓
Other	☑	❓
Security	☑	❓
Transaction Inquiry	☑	❓
Technical Problem	☑	❓
Bill Payment Inquiry	☑	❓
Check Copy Request	☑	❓
Change Address Request	☑	❓
Change Email Address Request	☑	❓
Credit Card Request	☑	❓
Statement Copy Request	☑	❓
Stop Payment Request	☑	❓
Tax Information Request	☑	❓
Skip-A-Pay Request	☐	❓

4. Notice that the first section of secure message subjects are automatically included and cannot be turned off. These secure message subjects are:

Account Information Request

Account Problem

ATM/Check Card Request

Dispute Transaction

Funds Transfer Inquiry

General Information Request

Other

Security

Transaction Inquiry

Technical Problem

5. The next group of secure message subjects are pre-selected, but can be de-selected by unchecking the box. These secure message subjects are:

Bill Payment Inquiry

Check Copy Request

Change Address Request

Change Email Address Request

Credit Card Request

Statement Copy Request

Stop Payment Request

Tax Information Request

6. The final option list, Skip-A-Pay Request, is not selected by default, but can be selected by checking the box.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Determine Emulation Access Options

Financial institutions can choose to allow service representatives to emulate a user when providing support to that user. The financial institution can determine access.

- Allow agents to add or edit transfers

- Allow agents to cancel transfers

- Allow agents to change address

- Allow agents to send messages

- Allow agents to add wires

- Allow agents to approve transactions

Selecting Capabilities for Emulation Access

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **On-Behalf-Of Access** expand button ⊞.
The On-Behalf-Of Access section opens.

⊟ On-Behalf-Of Access	
Allow Agents to Add/Edit Transfers	☐
Allow Agents to Cancel Transfers	☐
Allow Agents to Change Address	☐
Allow Agents to Order Checks	☐
Allow Agents to Send Messages	☐
Allow Agents to Add Wires	☐
Allow Agents to Approve Transactions	☐

4. Edit one or more emulation options.

Option	Description
Allow Agents to Add/Edit Transfers	If not selected, service representatives can view transfers, but not make changes to them.
Allow Agents to Cancel Transfers	If not selected, service representatives will not be allowed to cancel transfer.

Option	Description
Allow Agents to Change Address	If selected, service representatives will be able to use the Profile section of the settings in online banking to update the user's address.
Allow Agents to Order Checks	This feature not enabled.
Allow Agents to Send Messages	If selected, service representatives will be allowed to write and send a message from the user's message center. If not selected, the message center can be viewed, but not acted upon.
Allow Agents to Add Wires	If selected, service representatives will be allowed to create a wire transfer request on behalf of the user.
Allow Agents to Approve Transactions	If selected, service representatives will be allowed to approved a transaction on behalf of the approver.
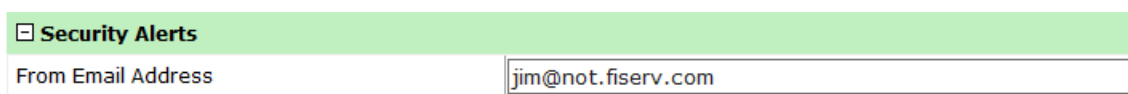
Providing Email Address for Security Alerts

Security alerts are sent via email to customers or members when certain changes have been made, such as changes to personally identifiable information. Because security alerts are sent by regular email, each financial institution adds the "from" email address to use for that email.

Most financial institutions use an email account that is either not monitored or even made up, such as `securityalerts@finame.com`. Even though the security alert email sent to customers or members request that they not reply to the message, sometimes they do reply.

For information about the content of security alerts emails, see *About Alerts Text in Email Messages*.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Security Alerts** expand button ⊞ .
The Security Alerts section opens.

⊟ Security Alerts	
From Email Address	jim@not.fiserv.com

4. Enter the from email address in the space provided.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.
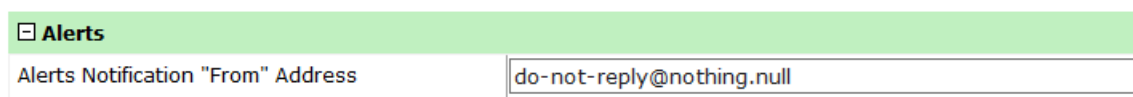
Providing Email Address for Alerts

Alerts are sent via email to customers or members when triggered according to the thresholds set by the customer or member. Because alerts are sent by regular email, each financial institution adds the from email address to use for that email.

Most financial institutions use an email account that is either not monitored or even made up, such as `alerts@finame.com`. Even though the alerts email sent to customers or members request that they not reply to the message, sometimes they do reply.

For information about the content of security alerts emails, see *About Alerts Text in Email Messages*.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Alerts** expand button ⊞ .
The Alerts section opens.

⊟ **Alerts**	
Alerts Notification "From" Address	do-not-reply@nothing.null

4. Enter the from email address in the space provided.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About the On-Demand Maintenance Page

A financial institution can, if needed, turn on the on-demand maintenance page when there is a planned outage that only affects that particular financial institution. When the maintenance page is activated, no traffic is sent to online banking; when users try to access online banking, they will see a System Unavailable page with the message you entered displayed instead. As soon as all activities associated with the planned outage are completed, simply de-activate the maintenance page to allow your users to access online banking.

Remember that planned Corillian Online ASP updates will automatically activate the Weekly System Maintenance page and require no action by the financial institution.

For more information, please see *About Maintenance Pages*.

Managing Activation for the On-Demand Maintenance Page

Follow these steps to activate or de-activate the on-demand maintenance page.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **FI Options** expand button ⊞.
The FI Options section opens.

⊟ FI Options			
Require fee account for business users	☐		❓
Activate Maintenance Page	☐		❓

4. Perform one of these activation options.

Option	Description
Activate the on-demand maintenance page	Ensure that the **Activate Maintenance Page** checkbox.
De-activate the on-demad maintenance page	Ensure that the **Activate Maintenance Page** checkbox is not selected.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

👉 **Note:** Your customers or members will not be able to access the online banking site until you have deactivated the on-demand maintenance page, as described above.

Requiring a Fee Account for Business Users

Some financial institutions require that business users select a fee account in order to use online banking services. If this option is required, those users will be asked to identify a fee account when they log in to online banking for the first time.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **FI Options** expand button 🔲 .
The FI Options section opens.

⊟ **FI Options**		
Require fee account for business users	☐	❓
Activate Maintenance Page	☐	❓

4. To require a fee account, select the checkbox. No action is needed if a fee account is not required.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Configuring Next Multi-Channel Marketing

Some financial institutions use the Next marketing tool. Those institutions need to configure Next to recognize the Corillian Online ASP ad spaces.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Next Multi-Channel Marketing Configuration** expand button ⊞.
The Next Multi-Channel Marketing Configuration section opens.

⊟ NEXT Multi-Channel Marketing Configuration	
Right-side Short Ad Space	0
Right-side Ad Space	0
Footer Ad Space	0
Trends Ad Space	0

4. Enter or change the channel ID for an ad space.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Defining Location After Session Ends

In Corillian Online ASP, when a user clicks the Sign In Again or Continue link when the session is ended, that user is, by default, sent to the online banking log in page. This location can, if needed, be changed. For example, financial institutions that use tethered login may wish to have those users sent to the login page on their own site for those user to sign in again.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Tethered Login** expand button ⊞.

The Tethered Login section opens.

⊟ **Tethered Login**		
Tethered Login Url		❓

4. Enter the fully qualified URL to the page users will be sent to.

👉 **Note:** If left empty, the standard online banking login page will be the destination used.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Enabling Transaction Download Options

Financial institutions can select one more download options for their members or users to choose from for downloading transaction information. The transaction download link is displayed on the Services module.

👉 **Note:** A Fiserv administrator, such as your financial institution's implementation engineer or project manager, must enable transaction downloads before these options will appear in the Services module.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **FI Options** expand button ⊞.
The FI Options section opens.

⊟ **FI Options**		
Require fee account for business users	☐	❓
Activate Maintenance Page	☐	❓

4. Select one or more of these transaction download formats:

Option	Description
Enable Transaction Download: QBO	This option is used for QuickBooks. To use this option, your implementation engineer or project manager must enter your financial institution's Intuit code.
Enable Transaction Download: QFX	This option is used for Quicken. To use this option, your implementation engineer or project manager must enter your financial institution's Intuit code.
Enable Transaction Download: OFX	The OFX (Open Financial eXchange) format is an open-source format that be used without any licenses or fees by anyone.
Enable Transaction Download: CSV	The CSV (comma-separated values) format provides downloads that can be easily opened in or added to a spreadsheet.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting Dollar Limits for Transfers

Each financial institution can specify limits to enforce for users making transfers in the online banking site. Setting limits can help prevent fraudulent access.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **Limits** expand button ⊞.

The Limits section opens.

□ **Limits**		
Maximum Single Transfer Amount	10000.00	❓
Daily Transfer Limit	1000000.00	❓
IA Challenge Single Transfer Amount Threshold	15.00 *Note: When this value is 0.00 then this Authentication is not Activated*	❓
Always Challenge Single Transfer When Amount Over Threshold	☑	❓
Minimum Single Wire Amount	0.01	❓
Maximum Single Wire Amount	10000.00	❓
IA Challenge Single Wire Amount Threshold	100.00 *Note: When this value is 0.00 then this Authentication is not Activated*	❓

4. In the **Maximum Single Transfer Amount** field, enter the largest dollar amount of a single transfer that the financial institution allows.

5. In the **Daily Transfer Limit** field, enter the largest dollar amount of all transfers that can be made in a 24-hour period.

6. In the **IA Challenge Single Transfer Amount Threshold** field, enter the largest dollar amount of a single transfer that can be made without requiring the user to authenticate by answering an Intelligent Authentication question.

7. Select the **Always Challenge Single Transfer Amount When Amount Over Threshold** check box to require all transfers over the threshold to be challenged, even if the user has already been challenged in the session.

   ☞ **Note:** If this box is unchecked, the user may not always be challenged when the transfer amount is over the threshold. If a user is asked to answer a challenge question previously during the session (such as when logging in), that user will not be challenged when performing the transfer. For extra security, select the checkbox to ensure that the user will always be challenged for a transfer amount over the threshold, whether or not that user has previously been challenged.

8. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Enabling Notes for Transfers

Financial institutions, which use core systems that support the feature, can enable a notes feature to transfers. This allows a user to enter a short memo or note about a transfer.

☞ **Important:** Not all core systems support the notes feature. Only financial institutions that run on XP2, Signature and Spectrum cores can use this feature.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** tab.

3. Click the **FI Options** expand button ⊞ .
The FI Options section opens.

⊟ **FI Options**			
Require fee account for business users	☐		❓
Activate Maintenance Page	☐		❓

4. Select the **Enable Transfer Memo** checkbox.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting Limits for Wire Transfers

Corillian Online ASP supports the creation of wire transfer requests by small business users. These requests are sent using the secure message feature. Financial institutions set the minimum and maximum limits to apply to all wire transfers.

Wire transfer requests can only be made from accounts that have the account capability for wire transfers. See *Configuring an Account for Small Business* for more information on how to add the capability to use wire transfers to an account type.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Settings** link for Staging or Production.

3. Click the **Edit Settings** button.

4. Click the **Limit** expand button ⊞.
   The Limits section opens.

Limits		
FI Routing & Transit Number (if only one)	123000220	
Password Lifetime	180	
Maximum Signon Attempts	3	
Minimum Single Transfer Amount	0.01	
Maximum Single Transfer Amount	10000.00	
Daily Transfer Limit	1000000.00	
IA Challenge Single Transfer Amount Threshold	15	
	Note: When this value is 0.00 then this Authentication is not Activated	
Always Challenge Single Transfer When Amount Over Threshold	☑	
Minimum Single Wire Amount	1	
Maximum Single Wire Amount	1000	
IA Challenge Single Wire Amount Threshold	10000.00	
	Note: When this value is 0.00 then this Authentication is not Activated	

5. Use **Minimum Single Wire Amount** to enter a dollar value for the smallest allowable amount for a wire transfer.

6. Use **Maximum Single Wire Amount** to enter a dollar value for the largest allowable amount for a wire transfer.

7. Use **IA Challenge Single Wire Amount Threshold** to set a dollar value to require the user to validate, either by answering a security question or, if out-of-band authentication is used, to request and then provide a security code. Any wire equal to or over the amount listed will require authentication; any value less than the amount will not be challenged.

8. When you are finished, you can:

| Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session will end after 45 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Self-Enrollment

Online banking's self-enrollment features allows members and customers to enroll themselves to use the online banking site. Each financial institution chooses the user validation options in order to provide a secure and easy-to-use self-enrollment experience for their members or customers.

Corillian Online ASP also offers the use of Google reCAPTCHA as part of the enrollment process. With this option, users will have to enter the letters that match words in an image before they can proceed.
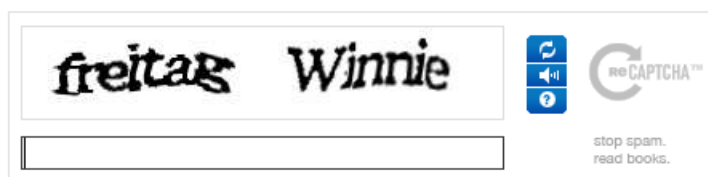
The extra step of using reCAPTCHA helps prevent automated processes, or bots, from attempting to enroll in online banking or attempting to tie up servers in an automated denial of service attack.

Contact your Fiserv project manager if you want to use this feature for your online enrollment.

Setting Up Self-Enrollment

Each financial institution can choose the specific items of information that must be verified in order for a customer or member to enroll in online banking.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **Enrollment** expand button ⊞ .

The Enrollment section opens.

⊟ **Enrollment**	
Disable Enrollment Link	☐ *Note: This will completely disallow enrollment through the UI. CSRs can still use RM for enrollment.*
Member ID	☑
Online Access PIN	☑
Last Name	☐
Zip Code	☐
Phone Number	☐
Address	☐

4. To prevent users from self-enrolling in online banking, select the **Disable Enrollment Link** checkbox. To allow users to self-enroll, ensure that this checkbox is not selected.

5. Select the user verification options from the list provided. You can choose as many or a few as you wish; most financial institutions use 3 or 4 verification options.

> ☞ **Note:** Each banking core provider has its own values that are applicable for using for the self-enrollment process. The items listed here will likely be different than the ones listed here, which come from a banking core simulator used for testing purposes.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting Password Complexity

Each financial institution defines the password complexity rules for their customers or members. The default setting for Corillian Online ASP (COASP) password complexity is:

- At least 8 characters

- At least one upper-case letter and at least one lower-case letter

- At least one number

- At least one special character (such as # or &)

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **Password Complexity** expand button ⊞.
The Password Complexity section opens.

⊟ Password Complexity	
Minimum length for passwords	8
Require mixed case passwords	☑
Require a number in passwords	☑
Require a special character in passwords	☑

4. In the **Minimum length for passwords** field, enter a number for the minimum length. (All passwords can be up to 32 characters long.)

5. In the **Require mixed case passwords** field, select the checkbox to require at least one upper case and at least one lower-case letter in a password.

6. In the **Require a number in passwords** field, select the checkbox to require at least one number in a password.

7. In the **Require a special character in password** field, select the checkbox to require at least one special character in a password.

8. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting Signon ID Complexity

Each financial institution defines the signon ID complexity rules for their customers or members. The default setting for Corillian Online ASP (COASP) signon ID complexity is:

- At least 3 characters

- At least one alphabetical character

- At most 32 characters

- The equal sign (=), ampersand (&), less than (<) and pound sign (#) are not allowed

- Not case sensitive

- Must be unique across the installation

The first two items in the list above can be changed by the financial institution. The other items are not configurable.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **Signon ID Complexity** expand button ⊞.
The Signon ID Complexity section opens.

⊟ Signon ID Complexity		
Minimum Length For Signon ID	3	❓
Require Alpha Character in Signon ID	☑	❓

4. In the **Minimum Length for Signon ID** field, enter a number for the minimum length. (All signon IDs can be up to 32 characters long.)

5. In the **Require Alpha Character in Signon ID** field, select the checkbox to require at least one alphabetical character in a signon ID.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Turning Off COASP SecureNow actions

These settings apply only if SecureNow services are configured for the financial institution. A financial institution with COASP SecureNow integration may turn off COASP actions so that online banking users do not experience any SecureNow challenges or denied operations.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **SecureNow Service** expand button.

⊟ SecureNow Service		
Override SecureNow Responses	☐	

The section opens.

4. To turn off actions to which an online banking user must respond, select the **Override SecureNow Responses** check box.

☞   **Note:** This setting is visible to all financial institutions, even those that do not have COASP SecureNow integration. If your financial institution does not have COASP SecureNow integration do not configure this setting, as it has no affect.

When selected, if SecureNow identifies a user operation as a medium or high risk, the user is allowed to proceed. The user is not challenged or denied. This setting can be used temporarily if online banking users are being challenged or denied too many times.

☞   **Note:** If connectivity to the SecureNow service is lost, the online banking user is always challenged, since the SecureNow service cannot determine the risk level. This is true even if **Override SecureNow Responses** is selected.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session will end after 45 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Recording Contact Information

While completely optional, the financial institution can use the settings on the Contacts tab to record contact information.

The financial institution can record the following information:

Project Contacts - Primary
Project Contacts - Secondary
Project Contacts - Payments
Internet Service Provider
Core Processing Provider
Digital Certificate Contact

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Contacts** tab.

3. Click the expand button ⊞ beside any of the contact options, as in the Project Contacts - Primary section.
The section opens.

⊟ Project Contacts - Primary	
Name	
Title	
Phone Number	
Phone Extension	
Mobile Phone Number	
Fax Number	
E-mail Address (e.g. "customersupport@corillian.com")	

4. Enter the requested information for the contact type.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting Masking for Account Numbers

To help ensure privacy, account numbers can be masked when displayed in the online banking site. Even if someone is looking over the shoulder of the customer or member when he or she logged in to online banking, the account number cannot be stolen.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Setup** tab.

3. Click the **Account Masking** expand button ⊞.
   The Account Masking section opens.

⊟ Account Masking	
Mask Account Number in UI	☑
Number of Visible Characters to Display for a Masked Account	4
Masking Character for Account Number	*
Mask Account from the Left or Right	◉ From the Left ○ From the Right

4. To enable account number masking, ensure that the **Mask Account Number in UI** checkbox is selected.

5. Enter the number of visible characters to display in the **Number of Visible Characters to Display for a Masked Account** field.

6. In the **Masking Character for Account Number** field, enter the character to display instead of the masked numbers.

7. In the **Mask Account from the Left or Right** section, select one of these options:

Option	Description
From the Left	Select this option to display only the last *n* characters in the account number, where *n* is the value set in the **Number of Visible Characters to Display for a Masked Account** field. Sample Result: *78901.
From the Right	Select this option to display only the first *n* characters in the account number, where *n* is the value set in the **Number of Visible Characters to Display for a Masked Account** field. Sample Result: 12345*.

8. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Choose the Method for Forgotten Password

Users who forget their password can use the forgotten password feature to create a new password after being authenticated. Financial institutions can choose between two methods to determine who forgotten password works.

- **Security Questions.** When the user clicks the **reset password** link, he or she user is prompted to answer one or more security questions. Once the questions are answered successfully, the user can create a new password for online banking.

- **Security Questions and Email.** When the user clicks the **reset password** link, an email is sent to the email address associated with the user. This email contains a link (this link is good for fiftenn minutes) for creating a new password. The user will be prompted with security question as well before he or she can use the new password.

Selecting a Method To Use For Forgotten Password

Online banking users can use the Forgotten Password feature to reset their password without having to contact customer service. Financial institutions select one of the two methods for their customers to use: the option to use security questions only or the option to use an email with a link and security questions.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Security** tab.

3. Click the **Forgotten Password Method** expand button ⊞.
The Forgotten Password Method section opens.
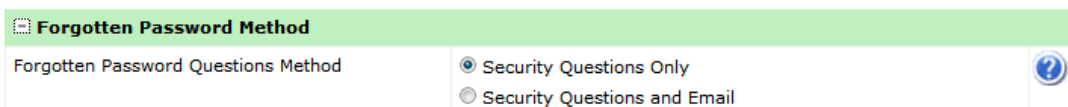
4. Select one of the two methods: **Security Questions Only** or **Security Questions and Email**.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Add the Financial Institution's Logo to Relationship Manager

Financial institutions can add their logo to Relationship Manager pages. For best results, the logo should be 120 pixels wide and 35 pixels high. See *Working with Logos* for more information.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Setup** tab.

3. Click the **FI Logo Display in Relationship Manager** expand button ⊞.
The FI Logo Display in Relationship Manager opens.
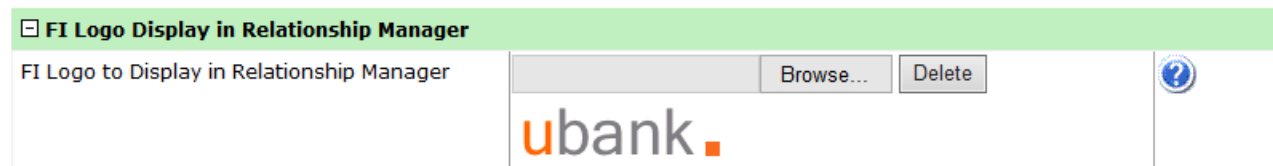
4. Use the Browse button to navigate to the logo image you want to use and click OK.
Your logo displays in the configuration tool and will also display in Relationship Manager.

> ☞ **Note:** Do not use the Delete button at this time. Instead, replace the image with another image, such as a small, transparent .GIF or .PNG file, if no graphic is needed.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Defining Stop Payment Self-Service Options

Each financial institution can decide whether or not to enable a self-service option for dealing with stop payment requests, for both single check and range of checks requests.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Setup** tab.

3. Click the **Self Service** expand button ⊞.
The Self Service section opens.

⊟ Self Service Options			
Enable Change Address	☑		?
Enable Check Copy Request	☑		?
Enable Statement Copy Request	☑		?
Enable Stop Payment (Single)	☑		?
Enable Stop Payment (Range)	☑		?

4. To enable customers or members to use the self-service option to request a stop payment for either a single check or a range of checks, ensure that the appropriate checkbox is selected.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Defining the Change of Address Self-Service Option

Financial institutions can choose to allow or not allow their customers or members change their mailing address online. By default, the settings link in the online banking site enables the customer or member to change their own mailing address. Some financial institutions, however, prefer that a change of address be performed by a representative of the institution.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Setup** tab.

3. Click the **Self Service** expand button ⊞.

The Self Service section opens.

⊟ Self Service Options			
Enable Change Address	☑		❓
Enable Check Copy Request	☑		❓
Enable Statement Copy Request	☑		❓
Enable Stop Payment (Single)	☑		❓
Enable Stop Payment (Range)	☑		❓

4. Choose one of these options.

> **1.** To enable self-service change of address, ensure that the checkbox is selected.
>
> **2.** To disable self-service change of address, ensure that the checkbox is not selected.

> ☞ **Note:** Additional options for handling change of address requests are available. Discuss these options with your project manager or other Fiserv administrator to learn more about these options.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Setting up Accounts for Online Banking

The creation of account groups and account types is one of the most important configuration tasks for a financial institution.

First, account groups are created. Each financial institution can have as many or as few account groups as they prefer. An account group is simply a description that includes one or more families of accounts.

For example, many financial institutions use an asset account group that includes checking, savings and money market accounts. A liability account group may include all personal loans.

After creating account groups, the account types are created. An account type is a representation of each banking product that your financial institution offers: checking and savings accounts, money market accounts, IRAs, credit cards, lines of credit, automotive loans, mortgages and many more. In setting up account types, you define all of the actions that your customers or members can perform on that account in the online banking site, such as transfers, use for bill payment and other account capabilities.

About Account Groups

Each financial institution creates its own account groups that consist of related banking products. Then, as you create each of your *account types*, you assign each account type you create to an account group. Account groups determine the order that account tiles are displayed on the Accounts page in the online banking site.

Let's assume that you create these account groups:

- Asset: Checking, Savings and Money Market

- Asset: Retirement and Investment Accounts

- Asset: CDs

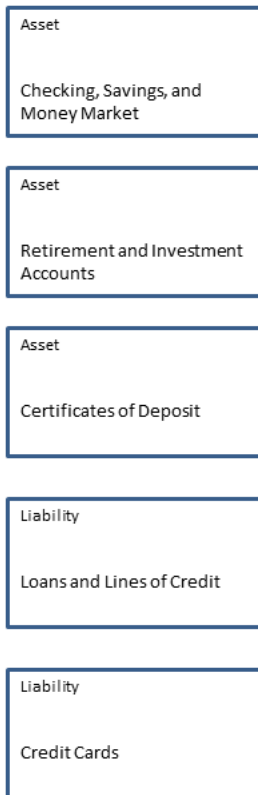- Liability: Loans and Lines of Credit

- Liability: Credit Cards

We can also assume that you used the up and down arrows to arrange these groups in this order.

Now we can look at a typical customer named Jason Smith, who has these accounts with your financial institution:

- A certificate of deposit (CD)

- Regular checking account

- Savings Account

- An IRA

- Two car loans

- A home equity line of credit

Based on the account groups described here, the account tiles would be arranged as shown:
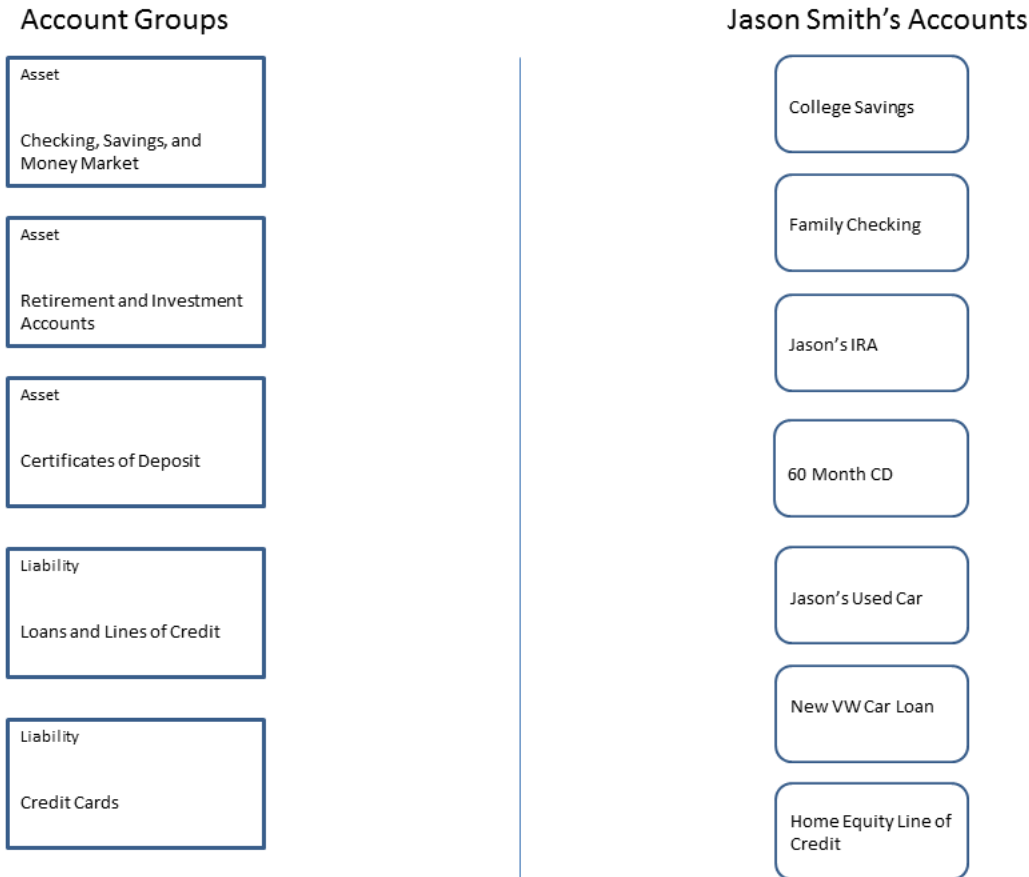
Account Groups

Asset
Checking, Savings, and Money Market

Asset
Retirement and Investment Accounts

Asset
Certificates of Deposit

Liability
Loans and Lines of Credit

Liability
Credit Cards

Jason Smith's Accounts

Regular Checking

Standard Savings

Basic IRA

60 Month CD

New Car Loan

Used Car Loan

Home Equity Line of Credit
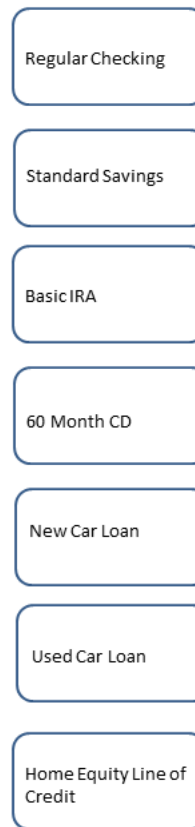
When there is more than one type of account for a group, such as we see in number 1, which has a checking account and a savings account, the tiles are ordered by the name of the account, as defined in the account type.

When the user a nickname for an account, the account tiles are sorted by that nickname, rather than the account name, as shown here:

Account Groups

Asset Checking, Savings, and Money Market

Asset Retirement and Investment Accounts

Asset Certificates of Deposit

Liability Loans and Lines of Credit

Liability Credit Cards

Jason Smith's Accounts

College Savings

Family Checking

Jason's IRA

60 Month CD

Jason's Used Car

New VW Car Loan

Home Equity Line of Credit

Creating Account Groups

The online banking site uses account groups to determine how account tiles are sorted on the Accounts page. Each financial institution chooses how many account groups to create. All account types associated with a specific account group are displayed together on the Accounts page. For more information about how account groups affect the order by which accounts are listed, see *About Account Groups*.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Groups** tab.

3. Click the Add Asset Group or Add Liability Group button ✚ to add a new account group of that type.

4. Enter a description for the account group, such as Retirement and Investment Accounts.

5. Repeat steps 3 and 4 until you have created all of the account groups needed for the financial institution.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Ordering Account Groups

The order that account groups are listed in determines the display order of account tiles in the online banking site. The account groups page lets you easily sort the account groups in the order that is best for each financial institution.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Groups** tab.

3. Use the arrows ⌃ ⌄ to sort the account groups in the desired order.

4. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Account Types

Financial institutions use the Account Types tab in the configuration tool to set up all of their accounts. In setting accounts, the financial institution (FI) defines the following information:

• Product name, OFX type, account group type

• The capabilities for each account type, such as stop payment, transfer to, transfer from, and if remote deposit may be enabled

- Account overview information that is displayed in a lightbox, such as description, account number, and available balance

- Transaction detail information

- Which balance types to display in lists and on tiles

The account type form for a new account type is shown here:

Account Type Detail

Display Name:	en: Primary Checking es: Primary Checking
Account Group:	Checking, Savings and Money Market Accounts ▾
Product Code:	3
OFX Category:	CHECKING ▾
Externally Managed SSO Type:	None ▾

Account Capabilities

☑ CheckImages ☑ CheckReorder

☑ PayBillsFrom ☐ PayNow

☑ StopPayment ☑ TransferFrom

☑ TransferTo ☑ DisplayBalanceInHistory

☑ StatementImages ☐ AA

☐ A2A ☐ EnableContextualRewardsLink

☐ EnableContextualBrokerageLink ☐ EnableContextualStudentServicesLink

☐ EnableContextualCreditCardLink ☐ ShowHolds

☐ RemoteDepositEnabled ☐ ShowProcessing

☑ WireTransfer ☐ ACHEligible

☐ TransferNowEligible

Account Information Lightbox

	Field	Label		Order
☑	Description	en: Desc	es: Desc	⌃ ⌄
☑	Number	en: Num	es: Num	⌃ ⌄
☑	AvailableBalance	en: Avail	es: Avail	⌃ ⌄
☑	CurrentBalance	en: Curr	es: Curr	⌃ ⌄
☐	NumberMasked	en:	es:	⌃ ⌄
☐	DisplayName	en:	es:	⌃ ⌄
☐	AmountDueMinimum	en:	es:	⌃ ⌄
☐	InterestYTD	en:	es:	⌃ ⌄
☐	MaturityDate	en:	es:	⌃ ⌄
☐	RewardsBalance	en:	es:	⌃ ⌄

Transaction Details Lightbox

	Field	Label		Order
☑	Date	en: Date	es: Date	⌃ ⌄
☑	Description	en: Description	es: Description	⌃ ⌄
☑	Type	en: Type	es: Type	⌃ ⌄
☑	CheckNumber	en: Check Image	es: Check Image	⌃ ⌄
☑	Amount	en: Amount	es: Amount	⌃ ⌄
☑	RunningBalance	en: Balance	es: Balance	⌃ ⌄
☐	CheckImage	en:	es:	⌃ ⌄
☐	CheckImageIdentifier	en:	es:	⌃ ⌄
☐	FITID	en:	es:	⌃ ⌄

Tiles and Dropdown Lists

Transfer To:	CurrentBalance ▾	Label: en: CurrentBalanceToday es: CurrentBalance
Transfer From:	CurrentBalance ▾	Label: en: CurrentBalanceDue es: CurrentBalanceDue
Account Tile Primary Label/Secure Message/Alerts:	CurrentBalance ▾	Label: en: balance es: balance ❓
Account Tile Secondary Label:	AvailableBalance ▾	Label: en: es: ❓

✔ Close Account Type Detail   ✖ Cancel Account Type Detail

[Back to Summary]   [Save to Staging]

To more easily understand the relationship between the configuration options for account types and their effect on the user interface, the account type form is grouped into sections. In the following examples, the account type is for a Money Market Checking account type. For each section, there is a picture of

the options chosen in each section and the screen image(s) from the online banking site that are affected by those options.

Account Type Detail

Financial institutions use the Account Type Detail section to name the account type, associate it with an account group, identify it using the correct product code, and define the OFX category. The account tile displays the account name as defined here, although users can easily give their own nickname to an account.

Account Capabilities
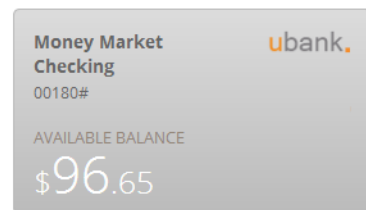
For each account type, the financial institution chooses the capabilities that account type should have. Some capabilities are widely used, such as the ability to transfer funds to an account; others are less so, such as viewing a check image, as that would only apply to accounts that use checks. Most account capabilities are listed as options on the Account Details page, although others (such as check images) are available from the transaction details.

For more information about account capabilities, see *About Account Capability Options*.

Account Information Lightbox

Each account shown in online banking has the option to view account information. The information presented is chosen using the configuration tool. Account information options include account description, account number, balance information, and interest information, among others.

Account Information Lightbox

	Field	Label	Order
☑	Description	en: Description	⌂ ⌄
☑	Number	en: Acct Number	⌃ ⌄
☑	AvailableBalance	en: Avail Balance	⌃ ⌄
☑	DisplayName	en: DisplayName	⌃ ⌄
☑	CurrentBalance	en: Curr Balance	⌃ ⌄
☑	NumberMasked	en: NumberMasked	⌃ ⌄
☑	AmountDueMinimum	en: AmountDueMinimum	⌃ ⌄
☑	InterestYTD	en: InterestYTD	⌃ ⌄
☑	MaturityDate	en: MaturityDate	⌃ ⌄
☑	RewardsBalance	en: RewardsBalance	⌃ ⌄

Account Information   ✕

Description :	Checking +
Avail Balance :	$96.65
DisplayName :	Money Market Checking
Curr Balance :	$98.65
AmountDueMinimum :	$0.00
MaturityDate :	4/23/2015
RewardsBalance :	$0.00

CLOSE

Transaction Details Lightbox

On each Account Details page, a transaction details list displays the latest transactions. The transaction details list contains the most important items of information: date, transaction description, the amount of the transaction, and the running account balance. However, additional details about transactions are available and may be displayed in a lightbox.

Transaction Details Lightbox			
	Field	**Label**	**Order**
☑	Date	en: Date	⌃ ⌄
☑	Description	en: Description	⌃ ⌄
☑	Type	en: Type	⌃ ⌄
☑	CheckNumber	en: Check Image	⌃ ⌄
☑	RunningBalance	en: Balance	⌃ ⌄
☑	Amount	en: Amount	⌃ ⌄
☑	FITID	en: FITID	⌃ ⌄
☐	CheckImage	en:	⌃ ⌄
☐	CheckImageIdentifier	en:	⌃ ⌄

Tiles and Dropdown Lists

In this section, the financial institution chooses what balance information is used in three places: the account tile, in the transfer to dropdown, and the transfer from dropdown. The options available support different types of accounts and include not only available and current balance, but minimum amount due, available credit, and other specific balance types to support a variety of account types.

Tiles and Dropdown Lists

Transfer To:	CurrentBalance ▾	Label: en:	CurrentBalanceToday	es:	CurrentBalance
Transfer From:	CurrentBalance ▾	Label: en:	CurrentBalanceDue	es:	CurrentBalanceDue
Account Tile Primary Label/Secure Message/Alerts:	CurrentBalance ▾	Label: en:	balance	es:	balance
Account Tile Secondary Label:	AvailableBalance ▾	Label: en:		es:	

Money Market Checking
ubank.
00180#

AVAILABLE BALANCE

$96.65

Transfer Money

From:
test123121 ▾

To:
Please select... ▾

Please select...

Credit Card
00216#
AVAILABLEBALANCE
$162.23

Money Market Checking
00180#
CURRENT BALANCE
$98.65

test123121
00011#

About Account Capability Options

When setting up account types, financial institutions select the capabilities that each account will have. These choices will apply to all customers or members who use that account type. The following table lists the most common capabilities. However, account type capabilities are tightly associated with the core host system that the financial institution uses; some capabilities listed here may not be available while other capabilities may be added to the list.

Check box name	Enables…
TransferFrom	Funds transfer from this account type to other accounts. If the account is also eligible for

Check box name	Enables…
	TransferNow, this setting will not apply to TransferNow transactions.
TransferTo	Funds transfer from other accounts to this account type. If the account is also eligible for TransferNow, this setting will not apply to TransferNow transactions.
PayBillsFrom	When selected, the account type is associated with the Bill Pay and Retail Popmoney services.
CheckImages	When selected, the account type is associated with a check image SSO feature and the check image links for that account history will show a link to the check image feature.
StatementImages	When selected, the account type is associated with a eStatements SSO feature and the contextual menu for that account will show a link to the eStatements feature.
StopPayment	Stop payment on issued checks
CheckReorder	When selected, the account type is associated with a check reorder SSO feature and the contextual menu for that account will show a link to the check reorder feature.
PayNow	"Pay Now" for this account type. Not currently implemented; reserved for future use.
AA	When selected, the account type is associated with an account aggregation (viewing information from accounts at other financial institutions) SSO feature and the contextual menu for that account will show a link to the account aggregation feature.
A2A	When selected, the account type is associated with an account-to-account (transfer of funds to and from accounts of other customers in the same financial institution) SSO feature and the contextual menu for that account will show a link to the account-to-account feature.
PrincipalOnlyPayments (liability accounts only)	Application of entire payment to principal and none to interest on liability accounts of the selected type
EnableContextualRewardsLink	When selected, the account type is associated with a rewards SSO (single sign on) feature and the

Check box name	Enables…
	contextual menu for that account will show a link to the rewards feature.
EnableContextualBrokerageLink	When selected, the account type is associated with a brokerage SSO feature and the contextual menu for that account will show a link to the brokerage feature.
EnableContextualStudentServices	When selected, the account type is associated with a student services SSO feature and the contextual menu for that account will show a link to the student services feature.
EnableContextualCreditCardLink	When selected, the account type is associated with a credit card SSO feature and the contextual menu for that account will show a link to the credit card feature.
RemoteDepositEnabled	Customers or members to deposit checks by uploading photographs or scans of the front and back of the check
WireTransfer	When selected, this account may be used for wire transfers. This option is only available to users that are in the small business segment.
ACHEligible	When selected, this account may be used with the Popmoney Invoices and Payments feature. This option is only available to users that are in the small business segment.
DisplayBalanceInHistory	When selected, the account balance is displays in the transaction history for the account. For some types of accounts where the balance is not useful, such as with a Mortgage account, this option can be not selected and no balance is displayed.
ShowProcessing	When selected, pending transactions will be retrieved and displayed. If not selected, pending transactions won't be retrieved or displayed.
TransferNowEligible	When selected, the account can be used for external account-to-account transfers with TransferNow from Fiserv.

☞ **Important:** NACHA regulations do not permit business accounts to use the CashEdge TransferNow feature. If this financial institution uses TransferNow, ensure that the **TransferNowEligible** capability is not selected for business accounts.

Notes about Account Capabilities for TransferNow

These notes apply to account capabilities only for those financial institutions that use TransferNow.

- Be sure to select the **TransferNowEligible** capability for all accounts that may be used with the TransferNow product.

- The **TransferTo** and **TransferFrom** account capabilities are not used when a banking user is creating a TransferNow transaction.

- TransferNow will not allow a transfer from a creditline account, such as line of credit, to an external account. TransferNow transactions can be created to transfer funds to a creditline account.

- NACHA regulations do not permit business accounts to use the CashEdge TransferNow feature.

Creating a New Account Type

Creating the account types used by your financial institution is one of the most important configuration tasks that is performed. The correct creation of account types is crucial for the proper display of the customer's or member's account information in the online banking site.

☞ **Important:** Be sure that you have created all of the account groups for your financial institution before adding new account types.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Click **Add Asset Account Type** or **Add Liability Account Type** ✚.

4.

Account Type Detail

Display Name:	en:
Account Group:	Checking, Savings and Money Market Accounts ▾
Product Code:	
OFX Category:	CHECKING ▾
Externally Managed SSO Type:	None ▾

Locate **Account Type Detail**.

5. Enter the values for these settings:

Setting	Description
Display Name	Enter the name of product for the account type.
Account Group	Use the dropdown list to associate this account type with an existing account group.
Product Code	Enter the product code that identifies this account type. Product codes usually consist of a prefix that is specific to each core system and a number that identifies a banking product. Contact your implementation project manager for information about using the proper product codes for your financial institution.
OFX Category	Select one of these OFX categories: **CHECKING**, **SAVINGS**, OR **MONEYMRKT**.
Externally Managed SSO Type	Some account types, such as credit cards, are managed by a third-party provider. If the account type you are adding is set up this way, select the appropriate option from the dropdown list. Most account types will use the **None** selection.

6.

Locate **Account Capabilities**.

☞ **Note:** Your list of account capabilities may differ from the image shown here. The account capabilities that are listed on your system are the ones that your core supports.

7. Click the checkbox next to each capability that you want this specific account type to have.

8. Locate **Account Information Lightbox**.

Account Information Lightbox			
	Field	**Label**	**Order**
☐	Number	en:	⋀ ⋁
☐	NumberMasked	en:	⋀ ⋁
☐	DisplayName	en:	⋀ ⋁
☐	AmountDueMinimum	en:	⋀ ⋁
☐	AvailableBalance	en:	⋀ ⋁
☐	CurrentBalance	en:	⋀ ⋁
☐	Description	en:	⋀ ⋁
☐	InterestYTD	en:	⋀ ⋁
☐	MaturityDate	en:	⋀ ⋁
☐	RewardsBalance	en:	⋀ ⋁

☞ **Remember:** The account information lightbox is opened from a link on the Account Details page. The account information lightbox typically contains all of the available information about a specific account type. For example, if the account pays interest on the balance, you might wish to include the Interest Year To Date option.

9. Click the checkbox next to each information field you want to display.

10. Enter the label you want to use for each information field that is selected.

11. Use the arrows ⋀ ⋁ to sort the account information fields in the desired order.

12.

Transaction Details Lightbox			
	Field	**Label**	**Order**
☐	Amount	en:	⋀ ⋁
☐	CheckImage	en:	⋀ ⋁
☐	CheckImageIdentifier	en:	⋀ ⋁
☐	CheckNumber	en:	⋀ ⋁
☐	Date	en:	⋀ ⋁
☐	Description	en:	⋀ ⋁
☐	FITID	en:	⋀ ⋁
☐	RunningBalance	en:	⋀ ⋁
☐	Type	en:	⋀ ⋁

Locate **Transaction Details Lightbox**.

Be sure to select fields, such as InterestAmount and LateChargeAmount, that can display a value for a transaction with a zero amount. Failure to do so prevents the Transaction Details lightbox from displaying information for that transaction.

👉   **Remember:** In the Past Transactions table, the amount of a transaction is a hyperlink that opens the Transaction Details lightbox, which contains detailed information about a specific transaction, whether a credit or a debit to the account.

13. Click the checkbox next to each information field you want to display in the transaction details lightbox.

14. Enter the label you want to use for each information field that is selected.

15. Use the arrows ⌃ ⌄ to sort the transaction detail fields in the desired order.

16. Locate **Tiles and Dropdown Lists**.

Tiles and Dropdown Lists

Transfer To:	CurrentBalance ▾	Label: en: CurrentBalanceToday	es: CurrentBalance
Transfer From:	CurrentBalance ▾	Label: en: CurrentBalanceDue	es: CurrentBalanceDue
Account Tile Primary Label/Secure Message/Alerts:	CurrentBalance ▾	Label: en: balance	es: balance ❓
Account Tile Secondary Label:	AvailableBalance ▾	Label: en:	es: ❓

17. Select the values for these settings.

Setting	Description
Transfer To	Use this setting to define account information to display for this account type when it is used to transfer funds to. Choices include: • AmountDue • AmountDueMinimum • AvailableBalance • AvailableCredit • CurrentBalance • OutstandingLoanBalance
Transfer From	Use this setting to define account information to display for this account type when it is used to transfer funds from. Choices include: • AmountDue • AmountDueMinimum • AvailableBalance

Setting	Description
	• AvailableCredit
	• CurrentBalance
	• OutstandingLoanBalance
Account Tile Primary Label/Secure Message/Alerts	Define the balance type to be displayed as the primary label on the account tile, as well as in messages and alerts that refer to this account type. See *Configuring Account Tile Primary Labels*.
Account Tile Secondary Label	Define the balance type and description to be displayed as the secondary label on the account tile. See *Configuring Account Tile Secondary Labels*.

18. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Copying an Account Type

Copying an account type speeds up the process of adding similar new account types. For example, once you have created an account type for a checking account, you can then copy that account type as a starting point to add an additional checking account type.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Locate the account type you want to copy in the list of account types.

Client Settings

Description of changes: [   ]

[Back to Summary]   [Save to Staging]

In order for your settings to be saved to your staging site, you must click the Save To Staging button.

| Look & Feel | Settings | Security | Contacts | Setup | Account Groups | Account Types | Content |

Enter Account Type Details

Display Name	Group	Product Code	OFX Category	
Mutual Fund	Investment and Retirement Accounts	14	SAVINGS	
BMW Loan	Consumer Loans	11	CREDITLINE	
Rainy Day Savings	Checking, Savings and Money Market Accounts	2	SAVINGS	
Mortgage	Mortgage	7	CREDITLINE	
Primary Checking	Checking, Savings and Money Market Accounts	3	CHECKING	
Cash Management	Checking, Savings and Money Market Accounts	9	CHECKING	
LOC	Lines of Credit and Home Equity Loans	5	CREDITLINE	
My Savings Account	Checking, Savings and Money Market Accounts	1	SAVINGS	
CD	Certificates of Deposit	10	SAVINGS	
Kitchen Loan	Lines of Credit and Home Equity Loans	8	CREDITLINE	
Money Market Checking	Checking, Savings and Money Market Accounts	4	MONEYMRKT	
VISA Platinum	Credit Cards	6	CC	
Brokerage	Investment and Retirement Accounts	13	SAVINGS	
Kid's Auto Loan	Consumer Loans	12	CREDITLINE	

➕ Add Asset Account Type   ➕ Add Liability Account Type

[Back to Summary]   [Save to Staging]

4. Click the copy button 🗐 for that account type.

A copy of that account type is added below the list of account types. This copy is identical to the account type you selected, except that the account type name field is empty.

5. Add the name for the new account type in the **Display Field** box.

6. Review the settings for the new account type and make changes as needed. See *Creating an Account Type* for more information.

7. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Editing an Existing Account Type

Account types can be easily edited, if needed.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Click the account type name that you want to edit.

Client Settings

Description of changes: [   ]

[Back to Summary] [Save to Staging]

In order for your settings to be saved to your staging site, you must click the Save To Staging button.

| Look & Feel | Settings | Security | Contacts | Setup | Account Groups | **Account Types** | Content |

Enter Account Type Details

Display Name	Group	Product Code	OFX Category		
Mutual Fund	Investment and Retirement Accounts	14	SAVINGS		
BMW Loan	Consumer Loans	11	CREDITLINE		
Rainy Day Savings	Checking, Savings and Money Market Accounts	2	SAVINGS		
Mortgage	Mortgage	7	CREDITLINE		
Primary Checking	Checking, Savings and Money Market Accounts	3	CHECKING		
Cash Management	Checking, Savings and Money Market Accounts	9	CHECKING		
LOC	Lines of Credit and Home Equity Loans	5	CREDITLINE		

4. Scroll down to view the account type information.

5. Make your changes, as needed.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Deleting an Account Type

Account types can, if needed, be deleted. Typically, they are deleted when created by mistake during the initial account setup. Of course, you can delete an account type at any time. However, if any customers or members have an account of that type, they will not be able to view their account information online if the account type is deleted.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Account Types** tab.

3. Locate the account type you want to delete in the list of account types.

4. Click the delete symbol ✖next to that account type name.

Adding Custom Textual Content to the Online Banking Site

Financial institutions can create add additional textual content to the online banking site. This text includes terms and conditions, the copyright statement and optional messages may be added to each page and lightbox in the online banking site.

Defining the Copyright Statement

Financial institutions use copyright statements in the footer of the online banking site to protect their site.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Copyright** expand button ⊞ .
The Copyright section opens.

⊟ **Copyright**	
Copyright Information	en: Copyright ©2014 [=tenant: Name]. All Rights reserved.
	Copyright ©2014 uBank. All Rights reserved.

4. Choose one of these options.

Option	Description
Use default option	The copyright control contains pre-defined text that you can use for the copyright statement. This text includes the current year, the HTML code for the copyright symbol ($^{©}$) as well as a macro that automatically inserts the name of the financial institution.
Create new text	Each financial institution, if desired, can enter their own copyright statement in the space provided.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.

Option	Description
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Creating Links to Appear in the Footer

The financial institution can create up to nine customized hyperlinks that will be displayed in the footer in the online banking site. These links can be to any content that you wish, not only links to content at your financial institution, but even to external content from trusted sources. Possible uses for these links include ATM and branch location, information for investors, contact information, and online applications for products and services on your financial institution's primary website.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Footer Links** expand button ⊞.

The Footer Links section opens.

⊟ **Footer Links**		
Footer Link 1: Text	en:	Help Help
Footer Link 1: URL	:	http://www.fiserv.com/
Footer Link 2: Text	en:	Locations Locations
Footer Link 2: URL	:	http://www.fiserv.com/
Footer Link 3: Text	en:	Privacy Privacy
Footer Link 3: URL	:	http://www.fiserv.com/
Footer Link 4: Text	en:	Security Security
Footer Link 4: URL	:	http://www.fiserv.com/risk-compliance1.htm
Footer Link 5: Text	en:	Contact Us Contact Us
Footer Link 5: URL	:	http://www.fiserv.com/about/contact-us.htm
Footer Link 6: Text	en:	
Footer Link 6: URL	:	
Footer Link 7: Text	en:	
Footer Link 7: URL	:	
Footer Link 8: Text	en:	
Footer Link 8: URL	:	
Footer Link 9: Text	en:	
Footer Link 9: URL	:	

4. For each link that you wish to include, specify

Label	Description
Text	Enter a word or short phrase that describes the link, such as `Locations` or `Contact Us`.

Label	Description
URL	Enter the fully qualified URL that point to the content, such as `http://www.mybank.detailedcontactinformation.html`

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Terms and Conditions

Financial institutions write the terms and conditions for use of online banking and bill pay for their users. From time to time, these terms and conditions may be updated. When that occurs, the financial institution can decide whether to require their members or customers to accept the new terms and conditions before using online banking.

Working With Terms and Conditions

The fields provided on the Content tab do not have a spelling or grammar checker built in. You may want to compose the terms and conditions in a word processor that will perform those checks. Then, you can save the file as text, such as `bankingtandc.txt`. You can copy that text content and paste it into the fields on the Content tab.

Follow these steps to write or edit text for terms and conditions.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Terms and Conditions** expand button ⊞.

The Terms and Conditions section opens.

4. Use the Banking section to write or edit terms and conditions for the use of the online banking site.

👉 **Note:** If your financial institution uses Spanish in addition to English for the online banking site, you will need to create versions of the banking terms and conditions in both languages.

5. If you want to require your members or customers to re-accept the updated terms and conditions, select the Yes option in the **Require users to re-accept updated Banking terms and conditions** section.

6. Use the Pay Bills and Pay People section to write or edit terms and conditions for the use of the online banking site.

👉 **Note:** If your financial institution uses Spanish in addition to English for the online banking site, you will need to create versions of the bill pay terms and conditions in both languages.

7. If you want to require your members or customers to re-accept the updated terms and conditions, select the Yes option in the **Require users to re-accept updated Pay Bills and Pay People terms and conditions** section.

8. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About The Services Module

Some financial institutions use third-party services to provide features to their customers or members. While many of these services are associated with specific accounts, such as electronic statements and check re-ordering, some of third-party services are not associated with a customer's current set of accounts.

Financial institutions often use third-party providers for specialized offerings, such as mortagages or credit cards. When supported by the provider, users may be able to apply for a mortgage or credit card within online banking.

When presenting the service module to a customer, online banking determines which accounts that customer has, including any account managed by third-party providers. So, for example, if the customer has a credit card granted through the financial institution (FI), the credit card information is displayed on a tile, just like his or her other accounts. However, if the customer doesn't yet have a credit card through the FI, that customer will see a credit card link in the services module, which can be clicked to get information or apply for a card.

Other services may be direct links to a service, such as the documents link. When users click this link, they are presented with lists of documents, such as tax forms, that may be downloaded.

A financial institution can set up a services module to feature links to any of these external services:

- Online account opening
- Lending online
- Credit card application
- Mortgage information
- Merchant capture
- Documents

When implemented, the services module displays on the Accounts page, underneath the Upcoming Bills and, if used, a marketing ad.
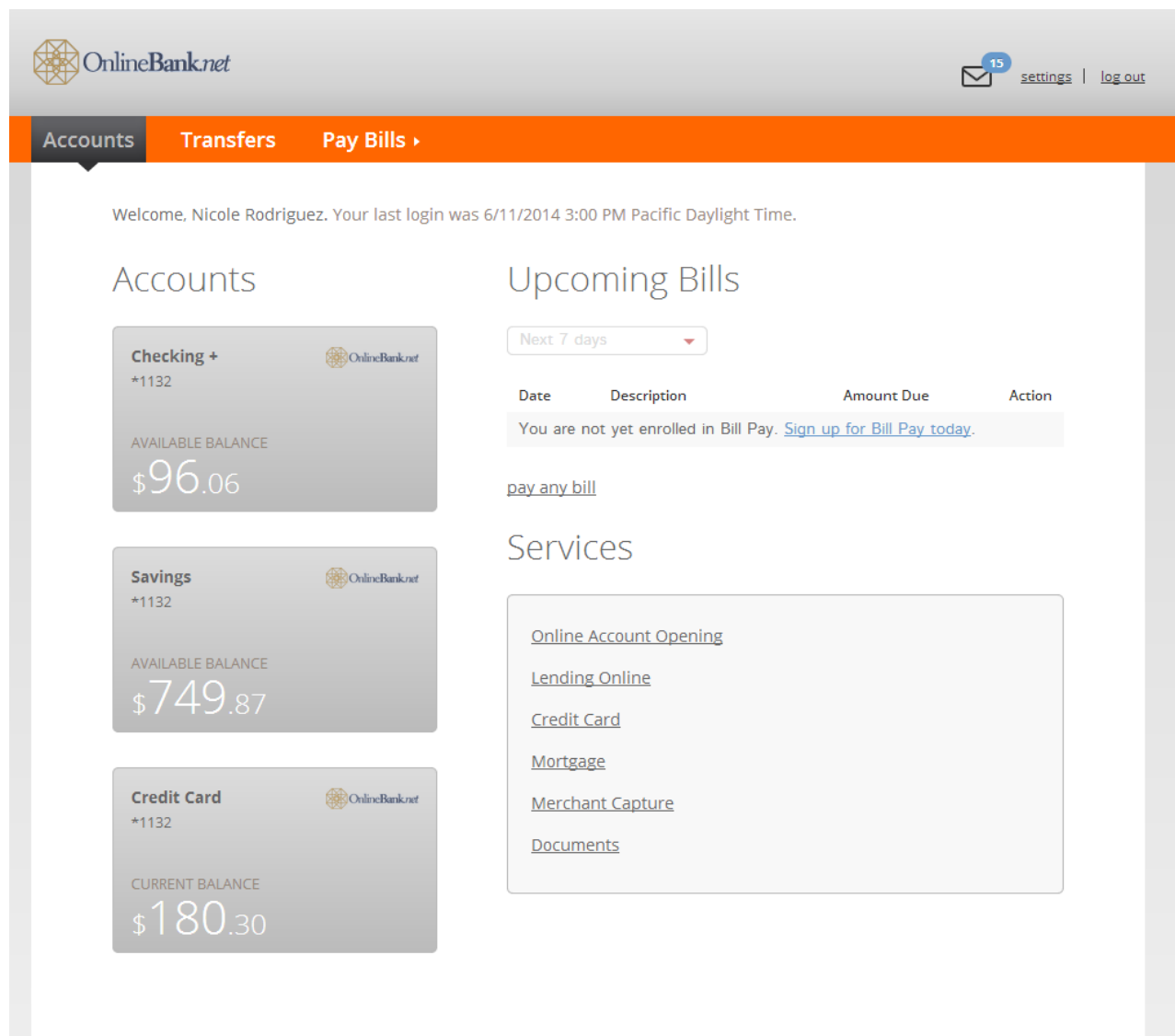
When customers or members click on one these links, a lightbox opens, which informs the user that they will be taken to a site outside of online banking to take advantage of that feature. Once the user elects to view the service, a new tab or window opens to provide that information.

Setting Up the Services Module

Follow these steps to set up text for the services to use on the services module.

👉 **Note:** In order for the links in the services module to properly work, the codes and links associated with the third-party provider must be set up by a Fiserv administrator, such as your project manager.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Services Module** expand button ⊞.
The Services Module section opens.

⊟ **Services Module**	
Online Account Opening - link text	en: Online account opening
Lending Online - link text	en: Lending online
Credit Card - link text	en: Credit card
Mortgage - link text	en: Mortgage
Merchant Capture - link text	en: Merchant capture
Documents - link text	en: Documents
Online Account Opening Lightbox	en:
Lending Online Lightbox	en:
Credit Card Lightbox	en:
Mortgage Lightbox	en:
Merchant Capture Lightbox	en:
Documents Lightbox	en:

4. For each service you want to use, enter link text in the appropriate box, as shown below. If left blank (or if the existing text is removed), that particular service will not appear in the services module.

Online Account Opening - link text	en: Online account opening
Lending Online - link text	en: Lending online
Credit Card - link text	en: Credit card
Mortgage - link text	en: Mortgage
Merchant Capture - link text	en: Merchant capture
Documents - link text	en: Documents

👉 **Note:** Suggested link text appears above the empty field boxes. These are not defaults and must be manually entered if desired.

5. For each of the services being used, you may, if desired, enter an optional page message to appear on the lightbox that opens when a user clicks a link in the services module.

Online Account Opening Lightbox	en:
Lending Online Lightbox	en:
Credit Card Lightbox	en:
Mortgage Lightbox	en:
Merchant Capture Lightbox	en:
Documents Lightbox	en:

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Maintenance Pages

From time to time, the online banking site will not be available to your financial institution's users. In those cases, a maintenance page is displayed to those users.

There are two categories of maintenance situations and each category has its own page that may be customized by each financial institution.

The first category is when Corillian Online ASP (COASP) is performing an update to the system. These system maintenances are scheduled well in advance. They typically last a few hours and begin just after midnight on Sunday mornings. With these types of system maintenance events, the **Weekly Maintenance Page** is automatically displayed to your financial institution's users. When the maintenance event is concluded, the maintenance page is removed and your customers or members are then able to access online banking. No action is required on the part of the financial institution for enabling or disabling the display of the Weekly Maintenance Page.

The second category covers maintenance events that are initiated by the financial institution. For example, you may use a non-Fiserv core banking system; when that system needed a system update, the COASP online banking site would not be able to work. In these cases, the financial institution can manually enable the **On-Demand Maintenance Page** for this maintenance event and then manually disable the maintenance page when the event is ended. See *About the On-Demand Maintenance Page* for information on turning this page on and off for your financial institution.

Both types of maintenance pages contain content that the financial institution has complete control over.

Adding Content to Maintenance Pages

Follow these steps to add customized content to either or both of the maintenance pages.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Maintenance Page** expand button ⊞ .

The Maintenance Page section opens.

⊟ **Maintenance Page**		
On-demand Maintenance Page	en:	
Weekly Maintenance Page	en:	

4. Enter the customized text for one of the maintenance page types, either on-demand or weekly scheduled.

5. If needed, enter the customized text for the other maintenance page type.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

For information about using the on-demand maintenance page, see *About the On-Demand Maintenance Page*.

About the System Unavailable Page

Occasionally, a user may not be able to reach the site successfully. In these cases, Corillian Online ASP (COASP) will present a page stating that the system is unavailable. When COASP is able to determine which financial institution the user is associated with, a customized system available page is presented. In cases when the associated financial institution cannot be determined, a default system unavailable page is displayed.
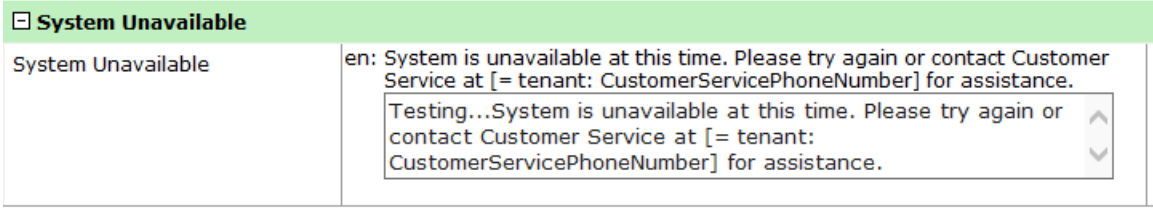
When customizing the system unavailable page, any relevant information may be added.

Customizing Text for the System Unavailable Page

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **System Unavailable** expand button ⊞.

The System Unavailable page section opens.

⊟ **System Unavailable**	
System Unavailable	en: System is unavailable at this time. Please try again or contact Customer Service at [= tenant: CustomerServicePhoneNumber] for assistance.
	Testing...System is unavailable at this time. Please try again or contact Customer Service at [= tenant: CustomerServicePhoneNumber] for assistance.

4. Use the default content as is or enter your own content. The default content contains a system variable that automatically inserts the phone number of your customer or member support center.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

About Alerts Text in Email Messages

For both user-defined alerts and security alerts, automated emails are sent to customers or members when appropriate. The content of these emails may, if needed, be changed.

User-defined alerts let customers or members be notified when certain actions take place, including certain types of transactions, balance threshold alerts and the receipt of a secure message from the financial institution.

Security alerts are sent to customers or members when personally identifiable information has been changed in online banking. This type of information includes user IDs, passwords, and mailing addresses.

Configuring Email Message Content for Approvals Required Alerts

Follow these steps to configure one or more of the message components for an approvals alert email messages.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Approvals Required Alert** expand button ⊞ .

The Approvals Required Alert section opens.

⊟ **Approvals Required Alert**

Generic Greeting and Footer

Generic Greeting

en: Dear {approverFirstName},

es: Estimado/a {approverFirstName},

Generic Footer

en: This is a notice only – please do not respond to this message.

es: Este mensaje sólo es un aviso. Por favor, no lo responda.

Approvals Required Alert

Transaction Approval: Subject

en: {transactionType} Approval Alert

es: {transactionType} Alerta de Aprobación

Transaction Approval: Body

en:
{submitterFullName} has created a {transactionType} dated
{transactionEffectiveDate} for {transactionAmount}, which needs your
approval in order to be processed. Sign in to online banking to manage the
approval process.

es:
Se necesita aprobación para procesar un {transactionType} por el monto de
{transactionAmount}, creado por {submitterFullName} en la fecha de
{transactionEffectiveDate}. Inicie sesión en línea para administrar el proceso
de aprobación.

4. You can use the default text already provided or create custom text content for the approval required alert.

Alert Section	Description
Generic Greeting	This standard greeting uses a variable for the approver's first name to create a greeting. If the approver's name is Robert Jones, the greeting would be "Dear Robert".
Generic Footer	The standard footer reminds the recipient that this communication is a notice only and to not reply to the message. There are no variables in the text.
Transaction Approval: Subject	This section provides the subject of the alert. It uses a variable to indicate the type of alert. At this time, only approval alert is supported.
Transaction Approval: Body	This section provides the details of the approval and uses several variables: full name of the submitter, the type of transaction, the date of the transaction and the amount of the transaction. A typical message might read (with variable content in italics): *Sandra Johnson* has created a *wire* dated *August 31, 2015* for *$9560.00*, which needs your approval in order to be processed. Sign in to online banking to manage the approval process.

☞ **Note:** The default text for the Approvals Required Alert has been translated into Spanish. If you change the content for any of the sections in this alert and if your financial institution uses Spanish, you will need to have the updated text properly translated.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Configuring Email Message Content for User-defined Alerts

Follow these steps to configure one or more of the message components for alerts email messages.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Alerts Email** expand button ⊞.
The Alerts Email section opens.

⊟ **Alerts Email**		
Account Balance Threshold Event	en: \t{0}\n \t{0}\n	
Account Balance Threshold Subject	en: Your Online Banking Alerts Your Online Banking Alerts	
Account Balance Threshold Subscription	en: {0}: The balance on your account ({1}) {2} ${3}. {0}: The balance on your account ({1}) {2} ${3}.	
Account Closed Event	en: \t{0} has closed. Any associated alerts have been cancelled.\n \t{0} has closed. Any associated alerts have been cancelled.\n	
Email Content Footer	en: This is a notice only - please do not respond to this message. This is a notice only - please do not respond to this message.	
Email Content Greeting	en: Dear {0}, Dear {0},	
Secure Message Event	en: Secure message received.	
Secure Message Subject	en: Your Online Banking Alerts	
Secure Message Subscription	en: You have {0} secure message(s). Please log in to online banking to review those messages.	
Transaction Amount Threshold Event	en: Transaction event ocurred.	
Transaction Amount Threshold Subject	en: Your Online Banking Alerts	
Transaction Amount Threshold Subscription	en: {0}: Your account ({1}) had one or more {2} transactions {3} ${4}.	

4. Make changes in or more of the message components, as needed.

☞ **Note:** The default text for the message components contains variables, designated by curly brackets, that produce the details required for Alerts Emails, such as account names, balances and so forth. If you do edit a text message and remove a bracket, you should use a test account

to generate a message of that type to verify the correct information in the automated Alerts email.

☞ **Note:** The `Account Balance Threshold Subscription` statement contains a variable ({1}), which shows the account number being discussed. If your financial institution chooses **not** mask account numbers, the emails that are sent will include the full account number. Because the emails are sent over the Internet, they are not secure. If your financial institution does **not** mask account numbers for online banking, you should consider removing the {1} account number variable from the statement.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Configuring Email Message Content for Security Alerts

Follow these steps to configure one or more of the message components for alerts email messages.

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the **Security Alert Email** expand button ⊞.
The Alerts Email section opens.

⊟ **Security Alert Email**

Change Address Body	en: Your address or phone number has changed.
Change Address Subject	en: Address/Phone Number changed alert
Change Email Address - New Address Body	en: Your email address on file for Online Banking has been updated. This is the new email address on file.
Change Email Address - New Address Subject	en: Email Changed Alert
Change Email Address - Previous Address Body	en: Your email address on file for Online Banking has been updated. This is the old email address on file.
Change Email Address - Previous Address Subject	en: Email Changed Alert
Change Password Body	en: Your online password has been changed.
Change Password - Subject	en: Password Changed Alert
Change Username Body	en: Your online user id has been changed.
Change Username Subject	en: UserID Changed Alert
Forced Set Email Address - Instructions	en: Please use the form below to give us your E-mail address. An E-mail address is required to use bill payment, bill presentment, and e-statements. We will also use it to alert you when any personal information is changed, such as your username, password, or address.
Forced Set Email Address - Title	en: Update E-mail
Security Alerts Greeting	en: We are sending this message to alert you that your account data may have changed.
Security Alerts Footer	en: If you were not aware of the modification of your account information, please contact our Customer Service at [Contact-phone number]. If you have any questions, please contact us at [Contact-phone number], Monday-Friday, 8:00 am - 7:00 pm and Saturdays, 8:00 am - 5:00 pm MT. This is a notice only - please do not respond to this message, as any response would be communicated over the internet. Since internet e-mail is not a secure form of communication, we cannot assure the privacy of this type of communication.

4. Make changes in one or more of the message components, as needed.

5. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.

Optional Messages for Pages and Lightboxes

Optional messages are one way for a financial institution to customize the pages and lightboxes used in the online banking site. Optional messages can provide additional information or instructions, tips and help, or any other kind of content needed.

The financial institution (FI) can add a custom message to each page and lightbox in the online banking site. This enables the FI to provide any additional information they wish to a page. Messages can contain HTML markup, such as bold and italics, to call attention to any information. Messages are contained in a banner, as shown here:

While the content of the messages is completely customizable, the appearance of the enclosing banner is not.
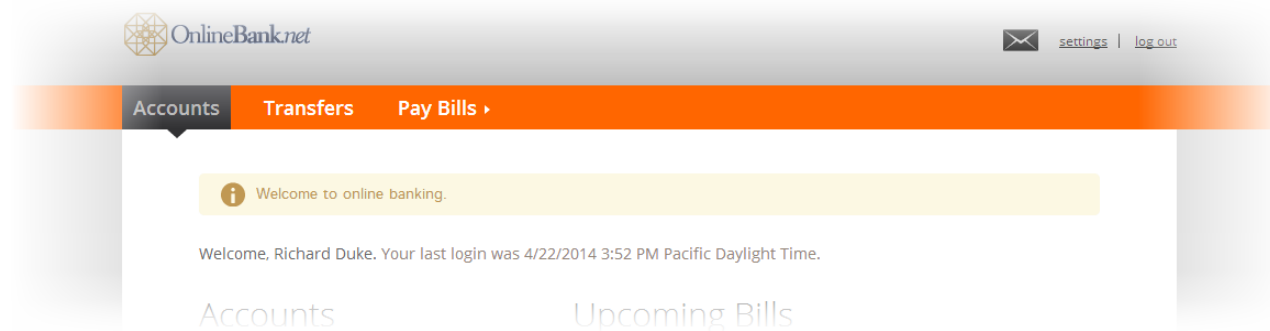
Optional Message Locations

This table lists each of the pages and lightboxes that can have an optional message added.

Section	Item	Notes
Terms and Conditions		
	Banking Terms and Conditions	Users can view banking terms and conditions from the enrollment process. They are also

Section	Item	Notes
		available to view from the footer on each page.
	Bill Pay Terms and Conditions	User can view bill pay terms and conditions during the sign up process for bill pay.
Login/Logout Pages and Lightboxes		
	Login Page	This is the first page the user sees upon accessing the online banking site.
	Logout Page	The user sees this page after clicking a Log out link in the online banking site. This page allows the user to log in again.
Accounts Pages and Lightboxes		
	Accounts Page	All users are directed to this page after they are successfully authenticated. They can view the balances on their accounts and click on an account tile to view details about that account on the Account Details page.
	Credit Card Account Tile Redirection Lightbox	Launched when the user clicks on a tile for more information about an SSO credit card account.
	Mortgage Account Tile Redirection Lightbox	Launched when the user clicks on a tile for more information about an SSO mortgage account.
Labels for Asset Table in List View		
	Asset Table Header	Header that describes the list view of all asset accounts
	Account Name and Number Column Header	Header that describes the account and account number for asset accounts
	Available Balance Column Header	Header that describes the available balance for asset accounts
	Current Balance Column Header	

Section	Item	Notes
Labels for Liability Table Labels in List View		
	Liability Table Header	Header that describes the list view of all liability accounts
	Account Name and Number Column Header	Header that describes the account name and account number column for liability accounts
	Current Balance Column Header	Header that describes the current balance column for liability accounts
	Amount Due Minimum Column Header	Header that describes the minimum amount due column for liability accounts
	Amount Due Column Header	Header that describes the amount due column header
	Due Date Column Header	Header that describes the next due date column for all liability accounts
Account Details Pages and Lightboxes		
	Account Details Page	Launched by clicking on an account tile on the Accounts Page.
	Account Information Lightbox	Launched when user clicks the Account Info link next to the account tile. Contains details about the account, such as the full account number, balances and interest earned.
	Transaction Details Lightbox	Launched when user clicks on a transaction amount in transaction details table
	eStatements SSO Redirection Lightbox	Launched when user clicks the eStatements link
	Stop Payment Lightbox - Entry - Page Message	First step in the stop payment workflow; user specifies check(s) to stop payment on.
	Stop Payment Lightbox - Fee Label	Adds label that appears before the fee disclaimer message in the stop payment lightbox.

Section	Item	Notes
	Stop Payment Lightbox - Disclaimer Message	Adds message regarding fees to the stop payment lightboxes.
	Stop Payment Lightbox - Review - Page Message	Second step in the stop payment workflow; user reviews request before submitting.
	Stop Payment Lightbox - Success - Page Message	Final step in the stop payment workflow; user is informed the request was accepted.
	Check Image Lightbox	Launched when user clicks on a check in the transaction details table.
Enrollment		
	User Verification Lightbox	Displayed on the lightbox after the user ID has been verified.
	Page Message - Create User ID and Password Lightbox	Displayed on the lightbox when the user is asked to create a user ID and password for online banking.
	Member ID - text input label	Displayed on page when user enrolls for online banking. Default is Member ID.
	Mother's Maiden Name - text input label	Displayed on page when user enrolls for online banking. Default is Mother's Maiden Name.
Enrollment		
	User Verification Lightbox	Displayed on the lightbox after the user ID has been verified.
	Page Message - Create User ID and Password Lightbox	Displayed on the lightbox when the user is asked to create a user ID and password for online banking.
	Member ID - text input label	Displayed on page when user enrolls for online banking. Default is Member ID.
	Online Access PIN - text input label	Displayed on page when user enrolls for online banking. Default is Online Access PIN.

Section	Item	Notes
	Mother's Maiden Name - text input label	Displayed on page when user enrolls for online banking. Default is Mother's Maiden Name.
Pay Bill Pages and Lightboxes		
	Pay Bill Lightbox - Entry	Launched when user clicks on an upcoming bill on the Account Page.
	Pay Bill Lightbox - Review	Second step in the Pay Bill workflow.
	Pay Bill Lightbox - Success	Final step in the Pay Bill workflow.
	Pay Bill Frame	Message displays on the frame in online banking that provides access to the bill pay product.
Message Center Page		
	Message Center	Launched when the user navigates to the Message Center by clicking mail icon in header.
	Message Center - Compose	Displays when user clicks button to create a new message.
	Message Center - Reply	Displays when user replies to a message from their financial institution/
Settings Pages and Lightboxes		
	Settings Main Page	Displays when user navigates to settings by clicking the Settings link in header.
	Change User ID Page	Launched when user opts to change his or her user ID.
	Change Password Page	Launched when user opts to change his or her password.
	Change Security Questions Page	Launched when user opts to change the security questions.

Section	Item	Notes
	Change Address Lightbox - Entry	Launched when user opts to change mailing address.
	Change Address Lightbox - Success	Confirmation of mailing address change.
	Change Phone and Email Lightbox - Entry	Launched when user opts to change phone and/or email address.
	Change Phone and Email Lightbox - Success	Confirmation of change.
	Update Account Nickname Lightbox - Entry	Launched when user clicks Accounts section and then on an account.
	Update Account Nickname Lightbox - Success	Confirmation of new or changed nickname for account.
Transfers Pages and Lightboxes		
	Transfer Money Lightbox - Entry	First step in the transfers workflow; user enters all transfer information here.
	Transfer Money Lightbox - Review	Second step in the transfers workflow; user reviews the information before submitting.
	Transfer Money Lightbox - Success	Final step in the transfers workflow; user receives a success message.
	Delete Series Transfers Lightbox - Entry	First step in the workflow to delete a recurring series of transfers.
	Delete Series Transfers Lightbox - Review	Second step in the delete recurring transfer series workflow; review before submitting.
	Delete Series Transfers Lightbox - Success	Final step in the delete recurring transfer series workflow; deletion successful.
	Delete Single Transfer Lightbox - Review	First step in single transfer deletion workflow; user specifies transfer to delete.
	Delete Single Transfer Lightbox - Success	Final step in single transfer deletion workflow;
Optional Products Pages		

Section	Item	Notes
	Invoices and Payments	Launched when a small business user selects the Invoices and Payments link in the main navigation bar. This option is only available to financial institutions which have purchased the CashEdge small business product.
	Trends	Launched when a user selects the Trends link in the main navigation bar. This option is only available to financial institutions which have purchased the CashEdge product.
	Mobiliti	Launched when a user who is not currently enrolled for mobile banking clicks the Mobiliti link in the header. This option is available only to financial institutions which have purchased the Mobiliti product.

Adding an Optional Message to a Page or a Lightbox

1. Open the configuration tool. See *Launching the Configuration Tool* for detailed information.

2. Click the **Content** tab.

3. Click the expand button for any of the sections listed in the table displayed earlier in this topic.

4. The section expands to show the pages and lightboxes that can have an optional message.

5. Enter text for one or more pages or lightboxes in any of the sections and items described in the table.

You can type your message in an advanced text editor or word processor to check the spelling and grammar of the content, if you wish. You can easily copy from an external document into any of the text boxes.

6. When you are finished, you can:

Option	Description
Save your changes	Type a summary of your action(s) in the **Description of changes:** box and click the **Save to Staging** button.
Make additional changes	Choose another section or tab to make additional changes.

Remember that your configuration tool session ends after 10 minutes. Thus, for best results, consider saving your changes with a meaningful description before working on additional configuration tasks.