

Internet Banking Website Enhancements

November 2015 release

Contents

- **LOAN SUMMARY SCREEN CHANGES** (refer to pages 3 – 6).
 - Ability to see the available balance on their visa debit cards;
 - Ability to change the order the accounts appear.
- **ACCOUNT SUMMARY SCREEN CHANGES** (refer to pages 7 – 10).
 - Ability to re-name any account they wish to, irrespective of whether it is:
 - a loan account, offset account or Visa debit card account
- **VISA DEBIT CARD SUMMARY SCREEN CHANGES** (refer to page 11).
 - Ability to see:
 - The cardholders names;
 - If they are the primary card holder or secondary cardholder;
 - The card number for each card issued;
 - The expiry date of the card;
 - The 'state' of the card, e.g. 'Active'
- **TRANSFER CREATION & TRANSFER FUNDS SCREEN CHANGES** (refer to pages 12 - 13).
 - A receipt number generated by system.

Loan summary screen

- Will now display the 'Available' funds for the customer's Visa Debit Card

Home Mrs. [REDACTED]

Loan for Refinance - Owner Occupied

Loan No.	1414 [REDACTED]	Current balance	\$359,321.50		
Matures	4/08/2044	Term (months)	360	Term remaining (months)	345

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
13999 [REDACTED]	Home Loan Product	\$369,643.09	\$17,688.97
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
		\$359,321.50	\$28,010.56

Loan summary screen

- Your customers will be able to change the order the accounts appear on the Loan Summary screen

Home Mrs. [REDACTED]

Loan for Refinance - Owner Occupied

Loan No.	1414 [REDACTED]	Current balance	\$359,321.50
Matures	4/08/2044	Term (months)	360
		Term remaining (months)	345

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
13999 [REDACTED]	Home Loan Product	\$369,643.09	\$17,688.97
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
		\$359,321.50	\$28,010.56

Loan summary screen

So how do you customers change the order the accounts appear in the Loan Summary screen?

- Right Mouse click on the account they wish to move
(they can do this anywhere on the line account appears on)

- Then simply drag the account to anywhere on the list
(refer to the following page for 'before' and 'after' screen shots)

Loan summary screen

Before

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
13999 [REDACTED]	Home Loan Product	\$369,643.09	\$17,688.97
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
		\$359,321.50	\$28,010.56

After

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
13999 [REDACTED]	Home Loan Product	\$369,643.09	\$17,688.97
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
		\$359,321.50	\$28,010.56

Account Summary screen

- Your customers will be able to change the name of an account – (a loan account, an Offset account, or a Visa Debit Card account)

Click the name below to personalise your account

Home Loan Product

Account No.	13999 [REDACTED]	Current balance	\$369,643.09		
Minimum instalment (per month)	\$2,057.22	Next instalment due	04/12/2015	Total available redraw	\$17,688.97

Account summary screen

So how do you customers change the name of the account?

- Right Mouse click on the name of the account
This will 'open'/make active the account name
- Then simply type in the name they wish for the account
(refer to the following page for 'before' and 'after' screen shots)

CARE: They must hit the 'Enter' key for the new name to be accepted by the system.

Account summary screen

Before

Home Transfer Funds Mrs [REDACTED]

Click the name below to personalise your account

Home Loan Product

Account No.	13999 [REDACTED]	Current balance	\$369,643.09
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After

Home Transfer Funds Mrs [REDACTED]

Click the name below to personalise your account

Back of the Black Stump investment property

Account No.	13999 [REDACTED]	Current balance	\$369,643.09
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Loan summary screen – post account name change

Before

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
13999 [REDACTED]	Home Loan Product	\$369,643.09	\$17,688.97
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
		\$359,321.50	\$28,010.56

After

Accounts

Please click or tap the account below to view more information or rename it. You can also click and drag the accounts into the order you would like.

Number	Description	Balance	Available
13999 [REDACTED]	Offset Account for 13999 [REDACTED]	-\$13,629.04	\$10,321.59
13999 [REDACTED]	Back of the Black Stump investment property	\$369,643.09	\$17,688.97
40001 [REDACTED]	Debit Card for 13999 [REDACTED]	\$3,307.45	\$0.00
		\$359,321.50	\$28,010.56

Visa Debit Card Summary screen

Your customers will be able to see more details about their card account.

Click the name below to personalise your account

Debit Card for 4000 [REDACTED]

Account No.	40001 [REDACTED]	Current balance	\$854.39
		Card limit	\$4,000.00

Cards

Card Name	Relationship	Card Number	Expiry Date	State
[REDACTED]	Primary	483867#####1451	30/04/2018	Active
[REDACTED]	Secondary	483867#####1469	30/04/2018	Active

Transactions

Last 90 days

Transfer creation confirmation screen – receipt numbers

If you customer creates a redraw or a pay anyone transfer then the receipt will appear like this in the transfer creation confirmation screen.

Transfer created

Your redraw for \$100.00 transfer has been created successfully.


Receipt #: **94701455423**

[Return to the transfers list](#)

Transfer Funds screen – receipt numbers

When your customer creates a transfer the receipt numbers will appear in the Transfer Funds summary screen like below.

Transfer Funds

BPay Pay a bill using BPay		Pay anyone Pay another Australian bank account	Transfer Transfer money between your accounts	Redraw Redraw your available funds into a nominated bank account
Payment Make a payment from your nominated bank accounts				

[Manage your pay anyone bank accounts](#)

[Manage your BPay biller history](#)

Upcoming Transfers

These are any transfers scheduled to come into or going out of your account.

Next Due	Receipt #	Frequency	Type	Amount	Action
25/11/2015	94701454277	Once	Bpay Payment From: [REDACTED] To: (8789) CITY WEST WATER CORPORATION 125039292114	\$50.00	Delete
25/11/2015	94701453543	Once	Direct Credit From: [REDACTED] To: [REDACTED]	\$200.00	Delete