



JACKHENRYUniversity

**My Templates: XP User Maintenance
Templates in Detail**

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User Maintenance

The screenshot displays the Xperience user interface. At the top, there is a navigation bar with the 'Xperience' logo, a search bar containing 'Search help', and window control icons. Below the navigation bar, there are tabs for 'Xperience', 'Customer & Account Inquiry', and 'User Maintenance'. On the left side, a sidebar contains navigation options: 'Favorites', 'Products' (highlighted), 'Links', 'Settings', 'Help', 'Notifications', 'Log Off', and 'Exit Xperience'. The main content area is divided into two columns: 'Products' and 'Functions'. The 'Products' column lists various applications like '4|sight', 'Branch Anywhere', 'jhaCall Center', 'jhaEnterprise Workflow', 'OnBoard', 'OnBoard Loans', 'SilverLake', 'Synapsys CRM', 'Synergy', and 'Teller'. The 'Functions' column lists various system tools like 'SilverLake', 'Ovation Bank 020/EDU (patricia.w)', 'Customer & Account Inquiry', 'SilverLake', 'Screen Editor', 'Field Editor', 'System Maintenance', 'Institution Maintenance', 'User Maintenance' (highlighted with a red box), 'Browser', 'Reporting Dashboard', 'PowerOn Configuration', 'Document Merge', and 'Enterprise Log Viewer'. A search bar at the top right of the main area contains the text 'Search for functions'.

User/Template Maintenance

Xperience - SilverLake

Xperience Customer & Account Inquiry User Maintenance

Options

User/Template Maintenance User Templates Template Report

Search

Refresh

Search Type: Name First Name: Last Name: OK

Related Functions

- Import/Export Templates
- Migrate User Templates
- Enable AD Group Templates

Name	User Name
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User/Template Maintenance User Templates Template Report

Search

Refresh Search Type: Name First Name: patricia Last Name: Widlund OK

Name	User Name
Patricia Widlund	PWidlund@jhaide.com

User/Template Maintenance User Templates Template Report

Related Functions

User: PWidlund@jhaide.com

Refresh Save Reset User Reset Toolbar Settings Close Support User PowerOn Administrator

Template: Education Trainers Template View Template

Account View: Remember last related function

Account Lookup: Search Criteria: Customer

Search Type: Name

Additional Loan Search Criteria: Escrow Parcel Number:

Do not display confirmation on application close

History Image Default: Front

Select Module: Checking Use All Demand Deposit Toolbar

Customize Toolbar for Selected Module



Xperience Customer & Account Inquiry SilverLake User Maintenance

User/Template Maintenance User Templates Template Report

User: P.Widlund@jhaide.com

Refresh Save Reset User Reset Toolbar Settings Close Support User PowerOn Administrator

Template: Education Trainers Template View Template

Account View: Remember last related function

Account Lookup: Search Criteria: Customer

Search Type: Name

Additional Loan Search Criteria: Escrow Parcel Number

Do not display confirmation on application close

History Image Default: Front

Escrow Parcel Number:
Insurance Policy Number:
Vehicle ID Number:
SBA GP Number:
Collateral Message:
Property Address:

Xperience Customer & Account Inquiry SilverLake User Maintenance

User/Template Maintenance User Templates Template Report

User: P.Widlund@jhaide.com

Refresh Save Reset User Reset Toolbar Settings Close Support User PowerOn Administrator

Template: Education Trainers Template View Template

Account View: Remember last related function

Account Lookup: Search Criteria: Customer

Search Type: Name

Additional Loan Search Criteria: Escrow Parcel Number

Do not display confirmation on application close

History Image Default: Front

Front
Front
Back
Combined

Template: Education Trainers Template View Template

Account View: Remember last related function

Account Lookup: Search Criteria: Customer

Search Type: Name

Additional Loan Search Criteria: Escrow Parcel Number:

Do not display confirmation on application close

History Image Default: Front

Select Module: Customer Use All Demand Deposit Toolbar

Customize Toolbar for Selected Module



Customize ToolBar


Template: Default Template
 

Refresh | Save | Delete | Create Template | Copy Template

Templates

Default Template

 Bryant
 Commercial Loan Department
 Customer Care
 Deposit Operations
 Deposit Operations - Data Entry
 Deposit Operations Backroom
 Education Trainers Template
 EIP Department
 Heather's Template
 JAC 2017
 JAC 2018
 JAC 2018-1
 Lenders
 Loan Department
 Loan Department Light
 Loan Operations
 Pat's Test Template
 Performance
 Tellers
 Temporary Template
 wires

 Preferences | Related Functions | Screen Editor | **Account Lookup Columns**


Institution Selection: Always Prompt
 Account View: Display File and Field in Help ToolTip
 Allow Users to Edit Merge Documents
 Recent Accounts: Keep the Last Accounts
 Account Lookup: Search Criteria:
 Search Type:
 Additional Loan Search Criteria:
 History Image Default:
 Customer View: Allow Add Customer Contact:
 Allow Users to View Customer Identification
 Display Credit Line from Customer Panel
 Display Credit Line from Customer Profile View
 Display account pseudo name in Customer Panel
 Override: Allow Users to Override Search Type, Search Criteria, Toolbar Settings, and History Image Defaults
 Account Maintenance: Display Confirmation Screen
 Account Inquiry: Display Code and Description for Field Values
 Xperience Settings: Activate Xperience
 Keep the Last Recent Options
 Collateral Tracking: Display Item Description Line 1 in Treeview
 Display Document Description Line 1 in Treeview
 CRM Settings: Search for Prospects on Customer Searches
 Allow Phone Log Integration
 Discovery Settings: Remove Xperience UI Menu Items from Products

Related Functions

The screenshot shows the 'User/Template Maintenance' interface for the 'Education Trainers Template'. The top navigation bar includes 'Xperience', 'Customer & Account Inquiry', 'SilverLake', and 'User Maintenance'. The main header shows 'User/Template Maintenance' with sub-tabs for 'User', 'Templates', and 'Template Report'. The current page title is 'Template: Education Trainers Template'. Below the title is a toolbar with 'Refresh', 'Save', 'Delete', 'Create Template', and 'Copy Template'. The left sidebar lists various templates, with 'Education Trainers Template' selected. The main content area has tabs for 'Preferences', 'Related Functions', 'Screen Editor', and 'Account Lookup Columns'. Under 'Related Functions', there are options to 'Reset ALL Function View Settings' and 'Reset Toolbar Settings'. A 'Select Module:' dropdown is set to 'All Demand Deposits' with a checked 'Use All Demand Deposit Toolbar' option. A search box is present above a table of functions. The table has columns for 'Function', 'Auto Start', 'Auto Focus', and 'Auto Hide'. The functions listed are: Transaction Entry, Transfers, USPS Address Verification, Waived Fees Inquiry, Wire Enter/Update, Wire Inquiry, and Wires-Recurring. To the right of the table is a 'Reset Function View Settings' panel with checkboxes for 'Auto Start' (checked), 'Auto Focus', and 'Auto Hide', along with a 'Configure Grid Settings...' link.

Reset ALL Function View Settings Reset Toolbar Settings

Select Module: Use All Demand Deposit Toolbar

Related Functions

Search:

Function	Auto Start	Auto Focus	Auto Hide
Transaction Entry			
Transfers			
USPS Address Verification			
Waived Fees Inquiry			
Wire Enter/Update			
Wire Inquiry			
Wires-Recurring			

Reset Function View Settings

- Auto Start
- Auto Focus
- Auto Hide
- [Configure Grid Settings...](#)

Grid Settings

Customer & Account Inquiry | SilverLake | User Maintenance

User/Template Maintenance | User | Templates | Template Report

Template: Education Trainers Template

Refresh | Save | Delete | Create Template | Copy Template

Templates

- Default Template
- Bryant
- Commercial Loan Department
- Customer Care
- Deposit Operations
- Deposit Operations - Data Entry
- Deposit Operations Backroom
- Education Trainers Template**
- EIP Department
- Heather's Template
- JAC 2017
- JAC 2018
- JAC 2018-1
- Lenders
- Loan Department
- Loan Department Light
- Loan Operations
- Pat's Test Template
- Performance
- Tellers
- Temporary Template
- wires

Preferences | Related Functions | Screen

Reset ALL Function View Settings

Select Module: All Demand Deposits

Related Functions

Search:

Function	Auto
Fresh Start	
Historical Information	
History	
Image Charges	
Image Inquiry	
Image Statements	
Inquiry Tracking	
iTalk	

Customize Toolbar for Selected Module

Grid Settings

Reset Grid Settings

Grid: History View

Filter: Transactions

Available Columns	Show these Columns
ACH Batch	Icon
ACH Code	Amount
ACH File Key	Posted
ACH Seq #	Check #
ACH Std Entry Class	Transaction Description
ACH Std Entry Class Code	EFT Description
ACH Transaction Code	Tran Code
ACH Transaction Description	Balance
Addenda Information	
Affects	
Affects Code	
Amt	
Batch	
Captured Payee	
Check Misc Flag	

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Load Custom Columns

OK | Cancel

Screen Editor

Xperience - SilverLake ? Search help

Xperience Customer & Account Inquiry SilverLake **User Maintenance**

User/Template Maintenance User Templates Template Report Options Related Functions

Template: Education Trainers Template

Refresh Save Delete Create Template Copy Template

Templates

- Default Template
- Bryant
- Commercial Loan Department
- Customer Care
- Deposit Operations
- Deposit Operations - Data Entry
- Deposit Operations Backroom
- Education Trainers Template**
- EIP Department
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- wires

Preferences Related Functions **Screen Editor** Account Lookup Columns

Select Product

Institution: 20 - Ovation Bank 020/EDU

Module: All Demand Deposits

Code: Default

Mode: Inquiry

Load Product

Tab Settings

	Name	Hide	Default
	Account	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Interest and Withholding	<input type="checkbox"/>	<input type="checkbox"/>
	Statement	<input type="checkbox"/>	<input type="checkbox"/>
	NSF/OD	<input type="checkbox"/>	<input type="checkbox"/>
	Exceptions Historical	<input type="checkbox"/>	<input type="checkbox"/>
	Revenue Opportunity	<input type="checkbox"/>	<input type="checkbox"/>
	Customer	<input type="checkbox"/>	<input type="checkbox"/>

Account Lookup Column

The screenshot displays the 'User/Template Maintenance' application interface. The top navigation bar includes tabs for 'Xperience', 'Customer & Account Inquiry', 'SilverLake', and 'User Maintenance'. The main header shows 'User/Template Maintenance' with sub-tabs for 'User', 'Templates', and 'Template Report'. The current view is 'Template: Education Trainers Template', with a toolbar containing 'Refresh', 'Save', 'Delete', 'Create Template', and 'Copy Template'.

The 'Account Lookup Columns' tab is active, showing the following configuration:

- Grid: Customer Items
- Layout: Customers

The 'Available Columns' list is currently empty. The 'Show these Columns' list contains the following items:

- Name
- Title
- CIF Number
- Tax ID
- Email Address
- Phone
- Address
- Class

Navigation buttons include 'Add ->', '<- Remove', 'Move Up', and 'Move Down'.

Questions?