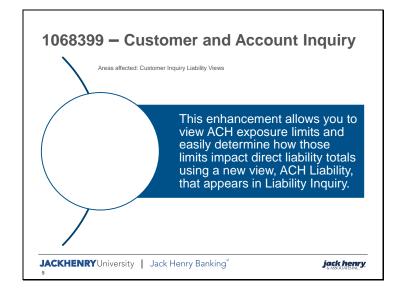






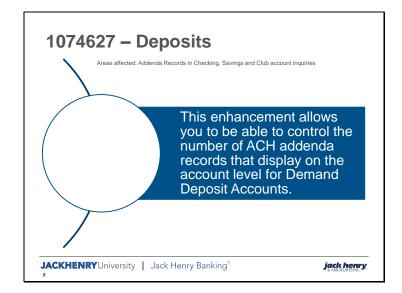


JACKHENRYUniversity Jack Henry E	Banking®	jack henry
CII		
CIF		



	lity ACH Liability	
ACH Liability		
Company Name	The Standard Entry Class	
•	TEL - CREDITKIT	\$500.00
ADD COMPANY.	TEL - TELEPHONE	\$64,854.00
 DATIN_DML 	TEL - PHONE PYMT	\$12,540.00
		Total Exposure = \$77,894.00
the Exposure Amount.	ides the Company Name , the Standard Er ears at the end of the Exposure Amount ite	try Class, and
the Exposure Amount . The total ACH exposure app		try Class, and

DEPOSITS



Print • 😸 Refresh 🛛 OK 🛛 Ca	iancel 📄 🗍 Account View 🕱 Delete Account		
Banner Messages (1)			
Stop payments			
earch			
escription: addenda			🗍 Customer Fie
count Fields			
Description	A To Value	To Field Help	
Number of Addenda Records to Print		0	
Print Addenda Records			

Number of Addenda Records to Print

This field allows you to set how many records to print. You can edit this field at the account level. The minimum value for this field is **3**. The maximum value is **98**. The value corresponds to the number of lines in the addenda that print.

Values can only be entered when the **Print Addenda Records** field is set to **Yes, print addenda records**. If the **Print Addenda Records** field is not **Yes, print addenda records**, the **Number of Addenda Records to Print** value is *0* or blank.

These fields also now appear when you edit a Checking, Savings, or Club account **Service Charge Code**.

Service Charge Code Charge
Show All Defaults

Changing Service Charge Code from CC - Commercial Checking to CN - Commercial

Description
Current Account Value
Card Opt-In Status:
F - Failed to respond

Description	Current Account Value		¢,	Default Value for Commercial NOW Acct
Card Opt-In Status:	F - Failed to respond	•	4	
Charge Bad Address Fee:		•	4	No
nterest Cycle:	31 - End of Month Cycle Business		4	0
lumber of Addenda Records to Print:		3	4	3
DD Limit:	1 - \$.05	-	4	0
rint Addenda Records:		•	4	Y - Yes, print addenda records
end Redeposit Notice:	A - Print all addenda records	•	4	Yes
ervice Charge Cycle:	H - Print Healthcare addendas only	•	4	0
itatement Cycle:	N - Do not print addenda records	•		0
tatement Cycle:	Y - Yes, print addenda records	•	4	0

These fields can be edited at the account level. When you edit the **Print Addenda Records** field, a dropdown appears with the following options:

Do not print addenda records Print all addenda records Print Healthcare addenda only Yes, print addenda records

If you set the **Print Addenda Records** field to **Yes, print addenda records**, you can also set how many records to print in the **Number of Addenda Records to Print** field. The minimum value for this field is **3**.

The maximum value is **98**. The value corresponds to the number of lines in the addenda that print.

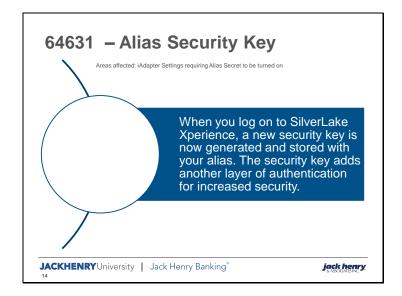
Slide 11

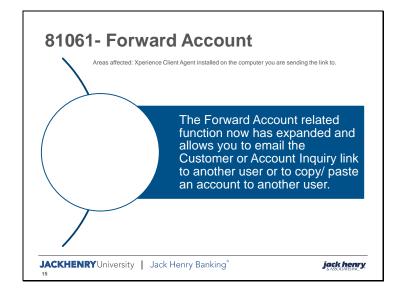
jhaPASSPORT	JACKHENRYUniversity Jack Henry Banking [®]	jack henry
JhaPASSPORT		
	ihaPASSPORT	

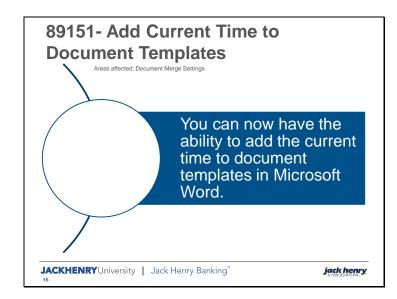


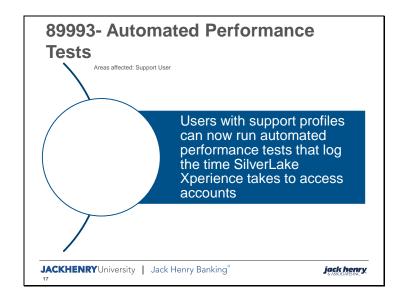


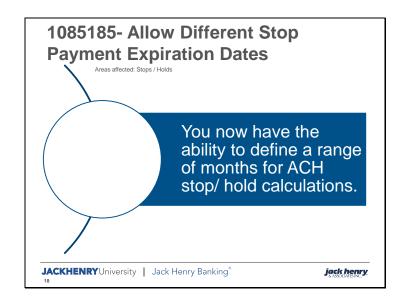
JACKHENRYUniversity Jack Henry Banking [®]	jack henry
MISCELLANEOUS	

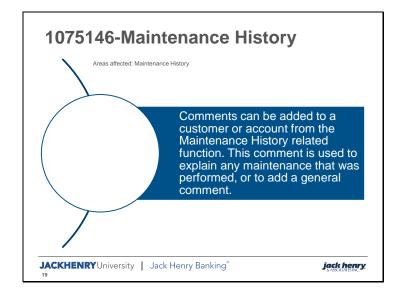


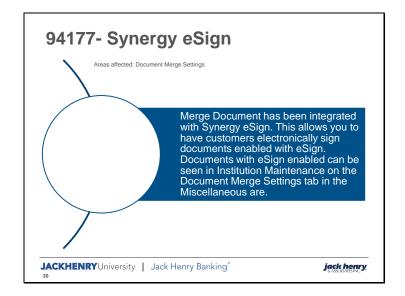


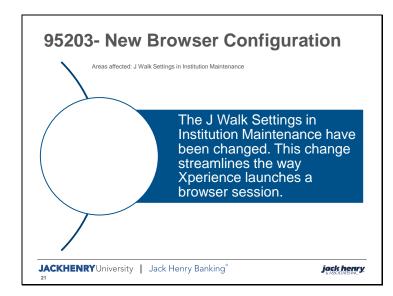




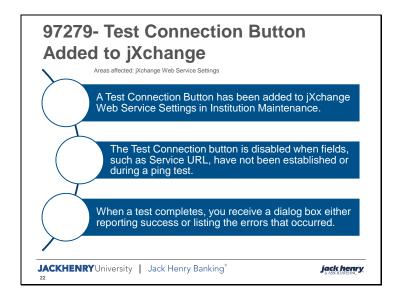


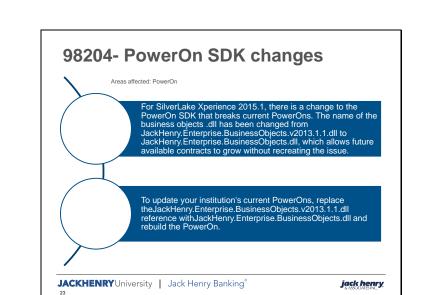




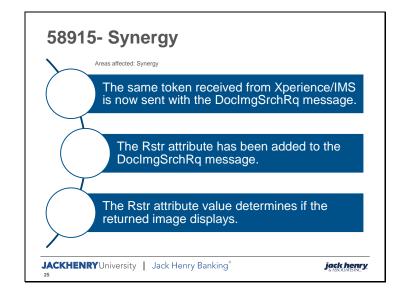


When Xperience launches browser, the system accesses the Browser.ini file and looks for the INI File Bank Identifier for your institution. The INI File Bank Identifier settings are used to configure your browser session.

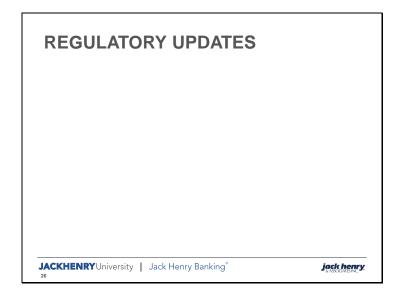


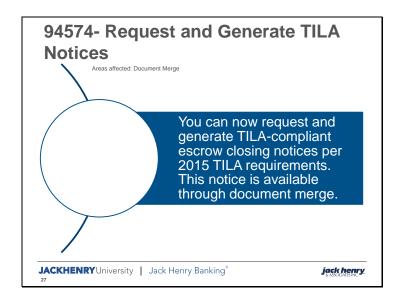


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INTEGRATIONS	



When Xperience launches browser, the system accesses the Browser.ini file and looks for the **INI File Bank Identifier** for your institution. The **INI File Bank Identifier** settings are used to configure your browser session.





When Xperience launches browser, the system accesses the Browser.ini file and looks for the **INI File Bank Identifier** for your institution. The **INI File Bank Identifier** settings are used to configure your browser session.



For this session on Xperience Administration, we'll begin with an in-depth review of System Administration, then conclude with Institution Maintenance.

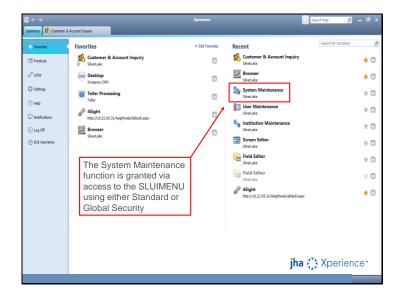
System Maintenance

- System Maintenance allows bank administration to establish system settings and server connections.
- Please contact Jack Henry Support before changing any fields especially if you are unsure how they will affect Xperience!

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System maintenance is found on the Xperience menu under your Core product, and is controlled by access to the SLUIMENU in either Standard or Global Security.

) + + ·	Xperience - SilverLake	? Search help 👂 🗕 🗗
perience 🦓 System Maintenance 🖪 X		() Option
🙀 System Maintenance 🔡 Save 🗟 Refree	ah	
🙀 System-Wide UI Settings	•	A
System Settings		🕈 Add Connection 🙎 Delete Connection
Allow Users to Maintain Aliases:		silverlake, Port 44014
System Default Institution:	914	silverlake, Port 44114 silverlake, Port 44913
Enterprise Logging User Name:	svcSLakeProduct	dmzi5, Port 44913
Enterprise Logging Password:		
Maximum Number of Records Returned per Search Request:	200	
Initial Number of Records Returned for History:	100	
Initial Number of Records Returned for Name Lookup:	100	
Initial Number of Records Returned for Other Searches:	100	
Shared Custom Code Identifier:		
Report Notification Service Port Block:	Start Port: 9070 End Port: 9090	Selected Connection Details
		SilverLake Server: silverlake
		SilverLake Port: 44014
		Institution ID: 44014
		iAdapter Key:
		Uses SSL:
		Verified State: 🗿 Unverifieddick test
		Click here to test Connection settings
		€ 10%

Under System-Wide UI settings are established for your institution along with any search results limits for the various search functions.

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Slide 32
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		(0)
		-
System Maintenance 🔓 Save 🗟 Refres	h	
System-Wide UI Settings		Server Connections
ystem Settings		Add Connection 😮 Delete Connection
		silverlake. Port 44014
System Default Institution:	914	silverlake, Port 44114 silverlake, Port 44913
Enterprise Logging User Name:	svcSLakeProduct	dmzi5, Port 44010
interprise Logging Password:		
Haximum Number of Records Returned per Search Request:	200	
initial Number of Records Returned for History:	100	
initial Number of Records Returned for Name Lookup:	100	
initial Number of Records Returned for Other Searches:	100	
Shared Custom Code Identifier:		
Report Notification Service Port Block:	Start Port: 9070 End Port: 9090	Selected Connection Details
		SilverLake Server: silverlake
		SilverLake Port: 44014
		Institution ID: 44014
		iAdapter Key:
		Uses SSL:
		Verified State: Ourverifieddick tes Click here to test Connection settings

Allow Users to Maintain Aliases lets you decide if you want your users to maintain multiple aliases. If so, your users can have multiple signons. You might use this if you have employees that have access to multiple banks, and signons are different, or they may have 2 signons due to different levels of security. The next field is for the default institution's bank number. The Enterprise Logging User Name and Password is set by JHA. Do not touch these fields unless advised by JHA

erience 🚷 System Maintenance 🖪 X		
System Maintenance 🔓 Save 🗟 Refre	sh	
System-Wide UI Settings		Server Connections
System Settings		🕈 Add Connection 🖹 Delete Conne
Allow Users to Maintain Aliases:		silverlake, Port 44014
System Default Institution:	914	silverlake, Port 44114 silverlake, Port 44913
Enterprise Logging User Name:	svcSLakeProduct	dmzi5, Port 44010
Enterprise Logging Password:	-	51
Maximum Number of Records Returned per Search Request:	200	
Initial Number of Records Returned for History:	100	J I
Initial Number of Records Returned for Name Lookup:	100	
Initial Number of Records Returned for Other Searches:	100	1
Shared Custom Code Identifier:		1
Report Notification Service Port Block:	Start Port: 9070 End Port: 9090	Selected Connection Details
		SilverLake Server: silverlake
		SilverLake Port: 44014
		Institution ID: 44014
		iAdapter Kev:
		Uses SSL:
		Verified State: 🙆 Unverifiedc
		Click here to test Connection se

The next four parameters control the number of records returned in each search message from IBM i to Xperience. Changing the values can result in degraded performance. Setting this value too high will cause delays in receiving messages due to the large size of the message. These values are determined by the JHA install team at the time of your install and should not be altered without contacting Support.

The maximum number of records returned per search request has a suggested value of a minimum of 100 and a maximum of 500. This is the Maximum number of records for all searches.

+ + ·							
		(P)	% Posted 1	5 Check #	% Transaction Description	T EFT Description	T. Amount T. Bal
rience 🚯 System Maintenance 🖪 X		•	11/05/201	4	920 - Memo Credit	TRANSACTION POSTED	ON-LINE \$5.00 \$1
			02/02/200	19	920 - Memo Credit	Phone/In-Person Transfe	er \$23.92 \$1
			02/02/200	19	920 - Memo Credit	Phone/In-Person Transfe	er \$864.54 \$1
			02/02/200	19	920 - Memo Credit	Phone/In-Person Transfe	er \$164.02 \$1
System Maintenance 🔡 Save 🗟 Refre	sh		02/02/200	19	980 - Memo Debit	Charge back	(\$863.12) \$1
by seen mannee and the grand			02/12/201	0	980 - Merno Debit	Photocopy Fee	(\$1.00) \$1
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y system-tride of seconds			02/02/200	19	920 - Memo Credit	Phone/In-Person Transfe	
			02/02/200		920 - Memo Credit	Phone/In-Person Transfe	
System Settings			02/02/200		920 - Memo Credit	Phone/In-Person Transfe	
Allow Users to Maintain Aliases:			02/02/200		980 - Merno Debit	Charge back	(\$863.12) \$1
0.1. 0.1. ht. in r	914		02/12/201		980 - Merno Debit	Photocopy Fee	(\$1.00) \$1
System Default Institution:	919		02/02/200		151 - Interest Rate Change		\$1
Enterprise Logging User Name:	svcSLakeP		01/28/200		70 - Check (DnUs)		(\$52.63) \$1
			01/28/200	19	137 - Chargeback Fee		(\$5.00) \$1
						35% Loaded	
Enterprise Logging Password:							
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Initial Number of Records Returned for History: Initial Number of Records Returned for Name Lookup:	100 100						
Maximum Number of Records Returned per Search Request: Initial Number of Records Returned for History: Initial Number of Records Returned for Name Lookup:	100						
Maximum Number of Records Returned per Search Request: Initial Number of Records Returned for History: Initial Number of Records Returned for Name Lookup: Initial Number of Records Returned for Other Searches:	100 100						
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Naximum Number of Records Returned per Search Request: Initial Number of Records Returned for Hatary: Initial Number of Records Returned for Name Lookup: Initial Number of Records Returned for Other Searches: Shared Custom Code Identifier:	100 100 100	9070	End Port:	9090]		Silvertaike Server: silvertaike Silvertaike Port: 44014 Institution ID: 44014 Mdapter Key:
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The Initial Number of Records Returned for History; for example, transaction history on deposits, loans, time deposits, and PassPort. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. When this maximum number is reached, the play/pause progress bar is displayed at the bottom of the history grid as shown in the inset.

stem Maintenar		Cubconici una	Account Lookup		
Search Criteria	 Search Results 				
S Customer	• 🈓 Print • 🗿 Clear				
	• Name	T. CIF Number		T. Address	T. Class
Maintenan _{Name:}					
Vide UI Set	BESSIE ADAMS	AAA0004	401-52-6323		NETT MO 65708 Individ
Contains	B > JOHN ADAMS	AAA0005	501-82-0700		ONETT MO 65708 Individ
gs CIF Number:	Mary Jane Adams	<u>A300499</u>	498-62-7734		say 20, Aurora Mi Person
Haintain Aliases:	Test My Address	AAA0001	191-91-9192		ionett MO 65708 Person
Tax ID: Institution:	Adam 3 Armstrong	<u>A300791</u>	111-22-3480	13346 Ash Rd, Au	rora MO 65605 Person
ing User Name: Telephone:	🕀 🗁 Grady D Bouzein	8300623	111-22-3523	443 Erickson Ct, A	urora MO 65605 Person
ing Password:	Brad R Burk	8300308	111-22-3504	203 Julie Ln, PO B	ox 117, Aurora M Person
d Records Returned for Name Lookup: 130 d Records Betwined for Other Saurches: 180 Code Bentfler:				Uses SSL:	efake 114 114 Unverfiedclick test
					Udapter Key: ••• Uses SSL:

The initial number of records returned for name lookup from the Customer and Account Inquiry search. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. Again, when this maximum number is reached, the play/pause progress bar is displayed at the bottom of the grid.

	- Account Relation	abine See									
									2000		1000.00
		Count	Deposits Total	Avg Rate	Count	Liabilities	Avg Rate	Count	Loans	Avg Rate	Other
System Maintenance	Direct	6	\$68,077.90	1.5422 %	13	\$475,877.22	5.1119 %	13	\$100,877.22	5.5281 %	4
-,	Indirect	0	\$0.00	8.0000 %	3	\$215,625.00	5.2043 %	3	\$112,500.00	6.3000 %	0
	Related	5	\$79,487.86	0.0564 %	36	\$5,913,558.47	2.7824 %	36	\$1,127,562.47	5.8975 %	3
	Account Number	r 15	Description		% Relationship	p % Status	T. Balance	% Rema	irks		
ystem Settings	▶ ♥ 10100000001		3 X 5 SAFE DEP	25IT BOX	Primary	Occupies	£	\$0.00 BESSIE	E ADAMS		
Allow Users to Maintain Aliases:	9 1010000004	9 1010000000 3 X 5 SAFE DEPOSIT BOX			Joint	Occupies	1	\$0.00 BESSIE	ADAMS		
System Default Institution:	9 10100000005		3 X 5 SAFE DEPI	OSIT BOX	Primary	Occupies		\$0.00			
	9 10100000301		10 X 10 SAFE DI	POSIT BOX	Auth Sign	Occupies		\$0.00 Gas Ar	merica		
Enterprise Logging User Name:	LAT A DECEMBER OF A	M 1234 Commercial Analysis		LANDLORD	Active		DIE 42 Clarr B	Bank 2: Has Protec	tion Acrt Alert N	lea.	
Enterprise Logging Password:	and a state of the	sd 6475 Basic Checking				Active			ADAMS: Alternati		
Initial Number of Records Returned for Other Sear Shared Custom Code Identifier:	rches: 100							-1			
Report Notification Senvice Port Block: Start Port: 9070 End Port: 9090							Selected Connection Details				
									SilverLake Server	silverlake	
									SilverLake Port:	44014	
									Institution ID:	44014	
									iAdapter Key:		
									Uses SSL:		
										-	
									Verified State:	Unverified o test Connection	

The initial number of records returned for other search requests. For example, stop payments or account relationships. The suggested values for this parameter are a minimum of 100 and a maximum of 1000. The inset shows an example of account relationships listed on the Customer Profile tab.

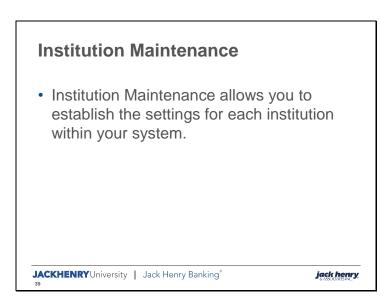
System Strategy Control And Users In Mattan Masse: St System Default Instant Masse: 914 Determine Loging User Manne: weichlich, Port 4114 Bedreiker, Port 4403 detection, Default Instanter, Port 4403 Bedreiker, Port 4403 detection, Detection, Detection, Port 4403 Stand Cuter, Cold, Bedreifer, Repart Hoffcation, Sense Port Block: Stand Luter, Cold, Bedreifer, Mediater, Port 4403 Bedreiker, Port 4403 Heidel, Port 4403 Mediater, Port 4403 Heidel, Port 4403 Mediater, Port 4403 Heidel, Port 4403) + + ·	Xperiesce - SilverLake	? Search help 👂 🗕 🖬
System-Vide UI Setting: Matching hot Match Matching bot Mance Matching hot Match Matching bot Mance Matching hot Match Matching bot Mance Matching hot Match Matching Matching hot Match Matching Matching hot Match Matching Matchin	serience 💊 System Haintenance 🔌 X		() Opt
System Settings Image: Control of Section Setting Proceedings	System Maintenance 🗟 Save 🗟 Refre	a	
yeare straig System Cellular Masse: System Odular Institution Masse: Sy	🗴 System-Wide UI Settings	•	👕 Server Connections
Sydem Defail: Institution: 914 Selection: Participation: 914 Selection: 914 Sele	System Settings		🕈 Add Connection 🕱 Delete Connection
Edepino Logog Passord:	System Default Institution:	914	silverlake, Port 44114 silverlake, Port 44913
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Initial Number of Recents Natureed for Other Searchess: 100 Shared Custom Code Meether Report Notification Service Port Bioch: Start Nath: 90270 End Pruts: 90290 SteleCall Comparison SteleCall Compa			
Report Notification Service Port Block: Start Port: 9070 End Port: 9090 Selected Connection Details Subscilla Server: diverbiale Server: diverbi			
Shretala Sever: Javenda Shretala Part: 44014 Institution ID: 44014 Magner Age: Uses 592: Uverfiel State: Verfiel State:	Shared Custom Code Identifier:		
Shertale Part 4404 Institution ID: 44034 Madgate Tay: Uest 502: Verified State: Querified State:	Report Notification Service Port Block:	Start Port: 9070 End Port: 9090	Selected Connection Details
Click hore to test Connection set			SilverLake Port: 44014 Institution ID: 44014 Mdapter Key: ••••••••••••••••••••••••••••••••••••
			Click here to test Connection settings

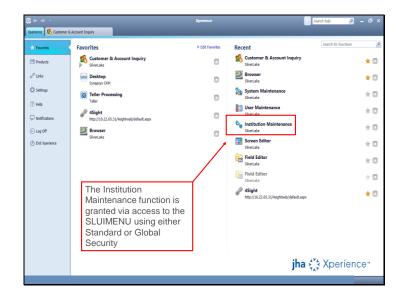
The shared custom code identifier is used to identify custom code that is used for all banks on your financial institution's system. This parameter should not be changed without instructions from JHA. The last field should only be maintained by Jack Henry personnel. It lists the Service Port block that should receive Report Notifications.

? Search help 2 - 8 ce 👔 System Maintenance 4 X () Option 🏠 System Maintenance 🔡 Save 🎅 Refresh System-Wide UI Settings 🍵 Server Cor ₽ Add ection 🦹 Delete System Settings silverlake, Port 44014 silverlake, Port 44114 silverlake, Port 44913 dm2i5, Port 44010 Allow Users to Maintain Aliases: \checkmark System Default Institution: 914 Enterprise Logging User Name: svcSLakeProduct rise Logging Password: rum Number of Records Returned per Search west: 200 Initial Number of Records Returned for History: Initial Number of Records Returned for Name Los 100 Initial Number of Records Returned for Other Searches: 100 Shared Custom Code Identifier: Start Port: 9070 End Port: 9090 Report Notification Service Port Block: SilverLake Server: SilverLake Port: 44014 Institution ID: 44014 iAdapter Kev: Jses SSL: Unverified...dick tes /erified State Click here to test

The Server Connections panel is used to Add or delete connections from the Xperience core application to the Jack Henry & Associates servers. The connection details display in the Selected Connection Details section. Modifying these settings can cause the core application to stop working. Please contact JHA support if you have any questions on Server Connections or if a new connection needs to be added.

Slide 38





Institution Maintenance 4 ×								
istitution Settings - 14 - 2014 Silver	Lake Test Bank							
Available Institutions	Institution Settings JWa	elk Settings Dichang	e Web Service Settings	Document Ner	ge Settings			
14 - 2014 SilverLake Test Bank 49 - SLAKE 2014 Xperience Test Bank	Inquiry Settings							٨
614 - Education Bank 1	Inquiry Types	Selected Inqu	iry Type					
13 - 2013 Silverlake Test Bank 13	All Demand Deposits	A Display Name:	All Dem	and Deposits				
	All Types	Short Descriptio		and Deposits				
	Checking	Allow Inquiry:						
Description: 2014 SilverLake T	est Credit Line	Code: Kev:	*DDA	Deposits				
Bank Environment: TE	Customer ST General Ledger	v NCY.	Deman	inchroit?				
Header Version:	Enable Type O Loa	15						
Number:	14							
	Headers and Footers				Footer:			
	Header: Left: Title/Function	Nama	None		Footer: Bank Name	* None		
	Niddle: Account Infor		None		None	 None None 	· ·	
	Right: Date in short f		None		Current Page Number	None		
	Right: Date in short	onna. •	WORK		Current Page Number	• None		
	Custom Code							
	Override system sha	ared custom code iden	tifier					
	Institution shared cus	stom code identifier:						

The panel on the left shows a list of institutions in your banking enterprise with some basic details in below.

Institution Maintenance										
istitution Settings - 14 - 2014 SilverLak	e Test Bank									
Save 😧 Refresh										
Available Institutions	Institution Settings JWalk S	Settings Dichang	e Web Servic	e Settings Document I	Merç	ge Settings				ŀ
14 - 2014 SilverLake Test Bank 19 - SLAKE 2014 Xperience Test Bank	Inquiry Settings				-					
514 - Education Bank 1	Inquiry Types	Selected Inqu	iry Type							
13 - 2013 Silverlake Test Bank 13	All Demand Deposits	Display Name:		All Demand Deposits	5					
	All Types Checking	Short Descriptio	n:	All Demand Deposits	5					
	Club	Allow Inquiry: Code:		*DDA						
Description: 2014 SilverLake Test Bank	Credit Line Customer	Key:		DemandDeposits						
Environment: TEST	General Ledger 🛛 🔻									
Header Version: Number: 14	Enable Type O Loans									
Number: 14	Headers and Footers									
	Header:					Footer:				
	Left: Title/Function Nar	ne •	None	•		Bank Name	•	None		
	Niddle: Account Informat		None			None		None	•	
	Right: Date in short form	nat •	None			Current Page Number	•	None	-	
	Custom Code									
	Override system shared	l custom code iden	bfier							
	Institution shared custor	n code identifier:								

The panel on the right shows the tabs available to change your settings. Tabs are: Institution Settings, JWalk Settings, jXchange Web Service Settings, and Document Merge Settings.

Inquir	ry Types	Selected Inqu	iny Type					
All Der All Typ Checki Club Credit Custor Genera	mand Deposits A pes	Display Name: Short Descriptio Allow Inquiry: Code: Key:	n: A	I Demand Deposits I Demand Deposits DDA emandDeposits				
	rs and Footers Header:					Footer:		
Left:	Title/Function Nar	ne 🔹	None	*		Bank Name •	None	
	Account Informati		None		1	None •	None	
Right:	Date in short form		None	•		Current Page Number 🔹	None	
	n Code rride system shared ution shared custon		tifier					

Under the Institution Settings tab, you can change the Inquiry Settings to mirror what your institution uses. Select an Inquiry Type to make changes. In this example, Checking is selected. You have the ability to change the Display Name, which shows in the Search Type drop-down list on the Customer and Account Inquiry. This allows you to use the terms your bank customers are used to seeing. Typically the short description field is the same as the display name. The Allow Inquiry field lets you choose to exclude a type in the Search Type drop-down list. You might want to use this functionality if you don't offer a particular account type. For example, if you don't have NetTeller or don't offer loan products, the Allow Inquiry field can be cleared, so that the account type does not display in the Search Type down list. The Code and Key fields are system defined fields and cannot be maintained.

Tudau	ry Types	Selected Inqu	in Tuno							
		Selected Inqu	iry type							
	mand Deposits 🔺	Display Name:		All Demand Deposits						
All Typ		Short Description	on:	All Demand Deposits						
Checki	ing 🖉	Allow Inquiry:		×						
Club Credit		Code:		*DDA						
Credit		Key:		DemandDeposits						
	al Ledger 🛛 🔻	Synergy Ca	binet	Deposit Cabine	et					
	ble Type O Loans				_					
Y ⊂na	ble Type O Loans									
	s and Footers									
	Header:					Footer:				
Left:	Title/Function Nar	ne •	None	•	Ι.	Bank Name	•	None	•	
Middle:	Account Informat	ion 👻	None	-] •	None	•	None	•	
Right:	Date in short form	nat 🔹	None	•		Current Page Number	•	None	•	
	1 Code									
Custom		custom code ider	tifier							
	rride system shared		lunci							
Ove	rride system shared									
Ove	rride system shared ution shared custor									
Ove										

The Synergy Cabinet field lets you set up Synergy archive documents for the selected inquiry type. All cabinets you have defined are available in the drop-down list. If you are using Synergy to archive your Document Merge items and no cabinet is selected, the cabinet will be determined at either the document level under the Document Merge Settings tab, or as a prompt for the user when merging a document. The Synergy Cabinet drop-down list is available for any Inquiry Types except: All Types, All Demand Deposits, LIP, Shareholder, and Vendor

Inquir	ry Types	Selected Inqu	iry Type					
	mand Deposits 🔺	Display Name: Short Descriptio	n:	All Demand Deposits All Demand Deposits				
Club Credit Custon	Line	Allow Inquiry: Code: Key:		*DDA DemandDeposits				
	rs and Footers Header: Title/Function Nar	ne •	None			Footer: Bank Name	None	•
	Account Informati		None		÷.	None -	None	•
Right:	Date in short form	iat 🔹	None	•		Current Page Number 🔹	None	•
Custom	1 Code							
	rride system shared ution shared custon		tifier					

If you still have active type O loans, you can check the Enable Type O Loans field. If included, they are combined with other loans and are listed under Loans in the drop-down list. This enables you to view them in Inquiry. By default, the box is not selected. The inset shows you an example of the Search Criteria types and how they display on your Customer and Account Lookup screen.

Credit Line Curdomer ✓ Enable Type O Loans ✓ Enable Type O Loans Header: Header: Header: Header: Header: Mone ✓ None ✓ Non	nquiry	Settings									
All Types Checking Check	Inquiry	y Types	Selected Inqu	uiry Type							
leaders of coters Footer: eft: Title/Function Name None Bank Name None None None None None None None Current Page Number None System Shared custom code identifier 	All Type Checkin Club Credit L Custom	ng Line ner	Short Descripti Allow Inquiry: Code:	on:	All Demand Deposits						
ustom Code	🗸 Enab	ble Type O Loans									
Override system shared custom code identifier	Headers	s and Footers Header: Title/Function Nan				B	ank Name			-	
Institution shared custom code identifier:	Headers	s and Footers Header:									
	Headers	s and Footers Header: Title/Function Nan Account Informati Date in short form Code rride system shared	on • Iat •	None	•	B	iank Name Ione	•	None		

The next section is Headers and Footers. This section allows you to decide what to print on a document when using the Print option on the session toolbar of any Xperience core entry point, such as Customer and Account Inquiry. These headers and footers are not associated with a standard report. Use the dropdown boxes to select one of the six items available. The second field allows you to choose from several font styles, such as bold, italic, underline or none.

moore:	ACCOUNT			NUIC			nuic			INVIE	•	
		hort format	·	None	•		Current Pa	age Number	•	None	•	4
Sustom	Code											1
Over	ride syste	m shared custom	code ider	tifier								
Institu	ition share	ed custom code id	entifier:									
Bank N	lame:											
liccolle	aneous S	attings				_						1
		d of service diction	naries								_	
_	ment: Pr			•				de param				
	Format Str							and mair		,		
	onnat ot							personne		rou nges or it		
Email S	Subject lin	e						ely affect		0		
								in Xperier				
Yellow	Hammer I	Due Diligence Bas	e URL:		<u> </u>						-	

Custom Code parameters are established and maintained by Jack Henry personnel. You shouldn't make any changes or it can adversely affect the core application in Xperience.

		JWalk Settings	prending	e Web Service Settings		rge setungs				
midale:	ACCOUNT	unormation	•	NUIC	•	NUIC		* NONE	111	ļ
Right:	Date in s	hort format	•	None	•	Current P	age Number	 None 	•	
Custom										
Oven	ride syste	m shared custom	code ident	tifier						
Institu	tion share	ed custom code id	entifier:							
Bank N	lame:									
Miscella	ineous S	ettings								
🗸 Enab	ole preloa	d of service diction	naries							
🗸 Enab		d of service diction	naries	•						
Enat	ole preloa ment: Pr	d of service diction oduction	naries	•						
Enat	ole preloa	d of service diction oduction	naries	•						
Enat	ole preloa ment: Pr	d of service diction oduction	naries	•						
✓ Enab Environi Dialer F	ole preloa ment: Pr Format Str	d of service diction oduction ing:	naries	•						
✓ Enab Environi Dialer F	ole preloa ment: Pr	d of service diction oduction ing:	naries	•						
Environi Dialer F	ole preloa ment: Pr Format Str Subject line	d of service diction oduction ing: e		•						
Environi Dialer F	ole preloa ment: Pr Format Str Subject line	d of service diction oduction ing:		•						
Environi Dialer F	ole preloa ment: Pr Format Str Subject line	d of service diction oduction ing: e		•						

Under Miscellaneous Settings the Enable Preload of Service Dictionaries allows you to enable the pre-fetch for service dictionary items.

The Environment field allows you to set the institution to either Production or Test to identify whether that institution is using live data or test data. Setting the environment can be useful when you want to set up institution theming for a particular Routing ID and Environment when configuring themes on your server.

Depending on the phone system you are using at your institution, refer to the documentation for that phone system to determine the dialer format needed for your application that you would enter into the Dialer Format String field.

moure:	Settings JWalk Settings jXcl	hange Web Service Settings	• ·	NUIC	• NUI	► AAA0002 된 💌 🗮 🖹
Right:	Date in short format	• None	•	Current Page Number	• Non	
						500 Broadway Suite 205 Springfield MO 65807
Custom	1 Code					Additional Addresses
Over	rride system shared custom code	identifier				Relationship: Primary account own Tax ID: 41-5553214
Institu	ution shared custom code identifi	ier:				
						sadans@abccompany.com
Bank N	Name:					🐞 Loans (33) 🔹
						Misc. Accounts (5)
						Drivers License: K987654
	stomer Corresp	ondence fro	m <- Ran	kNamess		
			in stean			
Environ	nment: Production	_				
	Format String:					
Dialer F						
Dialer F	Colored Base					
Dialer F	Subject line 🖌					
Email S						
Email S	Hammer Due Diligence Base UR	L:				

Under the Email Subject Line enter the default text that you want to appear in the subject line of an email you send to customers. You can use the bank name variable to include your institution's name in the subject line. When you select the email address link available in the CIF panel, as you can see in the insert, the text you enter in the Email Subject Line automatically displays in the subject line.

	ACCOUNT 1010	mauvii	-	NUIC	• 1 •	NUIC		NUIC	• • •
Right:				None	•	Current Pa	ige Number 🔹	None	
- agrici									
Sustom	Code								
Over	ride system si	hared custom o	ode iden	tifier					
		ustom code ide							
Institu	Joon snared c	ustom code ide	nuner:						_
Bank I	Name:								
COULT I	Turrus .								
_									_
liscella	aneous Setti	ngs							
🗹 Ena	ble preload of	service diction	aries						
	ment: Produ	ction		•					
Environ									
	Format String								
Dialer I	Format String								
Dialer I									
Dialer I Email S	Format String: Subject line								
Dialer I Email S	Format String: Subject line	Diligence Base	URL:						

If you are using the Yellow Hammer Customer Due Diligence related function in Customer Inquiry you must enter the Yellow Hammer Due Diligence Base URL in the Miscellaneous Settings.

Use JWalk		
JWC Path:		
http://2020.jhacorp.com/jha/slaker2014/sl2014/sl2014.jwc		
Host Address:		
silverlake.jhacorp.com		
License Server:		
2020.jhacorp.com		
Setup URL:		
http://2020.ibaaaaa.com/iba/alalaa2014/incellar/astronomia		
http://2020.jhacorp.com/jha/slaker2014/jwalkc/setupxs.msi P Prefill user sign on Disable JWalk Theming		
Prefill user sign on	The JWalk Settings are	
✓ Prefill user sign on ✓ Disable JWalk Theming Device Name Settings	The JWalk Settings are established and maintained by JHA personnel only. Changing	
V Prefil user sign on V Disable JWalk Theming Device Name Settings Use Stabic Device Names	established and maintained by JHA personnel only. Changing these settings will adversely affect	
V Prefil user sign on V Disable JWalk Theming Device Name Settings Use Static Device Names Use Base Device Name Sequencing	established and maintained by JHA personnel only. Changing	
	established and maintained by JHA personnel only. Changing these settings will adversely affect	
	established and maintained by JHA personnel only. Changing these settings will adversely affect the core application in Xperience.	

The JWalk Settings are established and maintained by JHA personnel only. Changing these settings will adversely affect the core application in Xperience.

		4
JWC Path:		
http://2020.jhac	rp.com/jha/slaker2014/sl2014/sl2014.jwc	
Host Address:		
silverlake.jhacor	com	
License Server:		
2020.jhacorp.co		
Setup URL:		
	rp.com/jha/slaker2014/jwalkx/setupxs.msi	
✓ Prefill user sig ✓ Disable JWalk	heming	
Device Name Se		
Use Static Dev	e Names	
Use Base De	ice Name Sequencing	
Remote Server	nvironment Variable:	
Physical Machin	Environment Variable: COMPUTERNAME	
	levice lookup file (enter location below):	
Use browser	:e01\Builds\Deployment\XPPackages\WordAddin\Templates\Deployment\DEVICE.TXT	
-	201 (builds (Deployment), APPackages (WordAddin (Templates (Deployment) DEVICE, TX T	

If your bank uses Biodentify[®], you can un-select the Prefill User Sign On option to turn off the username prefill when a user signs into a browser or browser transition session. The Disable JWalk Theming option can be selected to turn off any theme settings established in Xperience that would apply to a browser session so that you can use the default theme for a browser session.

Use JWalk			
Use Jwaik			1
JWC Path:			
http://2020.jhacorp.com/jha/s	aker2014/sl2014/sl2014.jwc		
Host Address:			
silverlake.jhacorp.com			
License Server:			
2020.jhacorp.com			
Setup URL:			
Setup URL: http://2020.jhacorp.com/jha/s Prefill user sign on Disable JWalk Theming	aker2014/jwalkx/setupxs.msi		
http://2020.jhacorp.com/jha/s	sker2014/jwalkv/setupxs.msi	This setting should only be	
http://2020.jhacorp.com/jha/si Prefill user sign on Disable JWalk Theming Device Name Settings Use Static Device Names		maintained by Jack Henry	
http://2020.jhacorp.com/jha/s Prefill user sign on Disable JWalk Theming Device Name Settings	uencing	0	
http://2020.jhacorp.com/jha/si Prefill user sign on Disable JWalk Theming Device Name Settings Use Static Device Names Use Base Device Name Sec	uencing uriable:	maintained by Jack Henry	
http://2020.jhacorp.com/jha/s Prefill user sign on Disable JWalk Theming Device Name Settings Use Static Device Names Use Base Device Name Set Remote Server Environment V	uencing rriable: Variable:	maintained by Jack Henry	
http://2020.jhacorp.com/jha/s Prefill user sign on Obseld: JWalk Theming Device Name Settings Use Static Device Names Use Base Device Name Set Remote Server Environment V Physical Machine Environment Ouse browser device lookup	uencing ariable: Variable: COMPUTERNAME file (enter location below):	maintained by Jack Henry	

Under the Device Name Settings, the Use Static Device Names option allows the fields to be used and maintained. These settings should only be maintained by Jack Henry personnel.

Settings for	NetTeller service		
Service URL: User Name: Password: Environment:			
Settings for Service URL: User Name: Password: Environment:	image service https://jxchange01-jxchangeg=isd.jha-sys.com/jXc svc-SynergyProduct@jhacorp.com	The jXchange Web Service Settings are established and maintained by JHA personnel only. Changing these parameters will adversely affect the core application in Xperience.	
Settings for 1	IVR service		
Service URL: User Name:			
Password:			
Environment:			

The jXchange Web Service Settings are established and maintained by JHA personnel only. Changing these parameters will adversely affect the core application in Xperience.

Services can be set up for Image, NetTeller, IVR, Check and Statement Image, and iPay.

stitution Settings JWalk Settings jXchange Web Ser	nce setting	s Document Merge Settings	
Template Path Settings			
Interactive Documents:			
\\IDEFS01.jhaide.com\Xperience Merge Documents\In	teractive Do	ocuments\	
System Documents:			
\\DIEFS01.jhaide.com\Xperience Merge Documents\Sy	stem Docur	nents\	
Available Documents	Doc	ument Archiving	
Cobiz - OD Account Action Required.docx	▲ Arch	ive:	No
uments\Interactive Documents\Backup Cobiz - OD Account Action Required.docx	Doo	ument Type:	
uments\Interactive Documents\Sprint	Cabi	inet:	
Customer Address Change Verification Letter.do rge Documents\Interactive Documents	Read	d only document type and cabinet:	No
Customer Contact Change Form.docx rge Documents\Interactive Documents	Doc	ument Merge Prompts	
Customer Contact Change Form.docx uments\Interactive Documents\Backup	÷	Add 📝 Edit 🐮 Delete	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label The Format The Display Option	ns The Default Value The Required The Tol
Date format test.docx uments\Interactive Documents\Sprint			
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents	v		
e se ti i	- I - I		

The Document Merge Settings tab allows you to specify the paths to the folders where your document templates are stored, either locally or on a network drive. Also on this tab, you can set up archiving for a document or statement that you have edited and/or produced for your customer using the Document Merge functionality. Archiving can be used if your institution has a content management system, such as Synergy, integrated with the core application in Xperience. You can also add institution-defined fields to a prompt that lets you add those fields to a document created using the Document Merge functionality.

Femplate Path Settings			
Interactive Documents:		Eorme or	nd Letters
\\IDEFS01.jhaide.com\Xperience Merge Documents\I	nterac		
System Documents:		Activity S	Statements
\\DIEF501.jhaide.com\Xperience Merge Documents\	ystem	n Documents\	
Available Documents		Document Archiving	
Cobiz - OD Account Action Required.docx	۸	Archive:	No
uments\Interactive Documents\Backup		Document Type:	
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Sprint		Cabinet:	
Customer Address Change Verification Letter.d rge Documents\Interactive Documents	2	Read only document type and cabinet:	No
Customer Contact Change Form.docx rge Documents\Interactive Documents		Document Merge Prompts	
Customer Contact Change Form.docx uments\Interactive Documents\Backup		ě Add 📝 Edit 🙁 Delete	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label The Format The Display Options	s The Default Value The Required The Tok
Date format test.docx uments\Interactive Documents\Sprint			
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents			
e nei ti ti			

The Interactive Documents merge option specifies the location in which all templates for letters and forms are stored locally. If your templates are stored in several sub-folders, specify the parent folder that contains them. Your Users can then navigate to the sub-folder using the Windows Explorer that appears when they click the Merge Document button.

The System Documents merge option is for activity statements only. Enter the network path where those documents are stored so they can be used when creating an activity statement.

stitution Settings JWalk Settings jXchange Web Se	rvice	Settings Document Merge Settings				
Template Path Settings						
Interactive Documents:						
\\IDEFS01.jhaide.com\Xperience Merge Documents\Iu	nterac	tive Documents\				
System Documents:						
\\DIEFS01.jhaide.com\Xperience Merge Documents\S	ystem	Documents\				
Available Documents		Document Archiving				
Cobiz - OD Account Action Required.docx	۸	Archive:	No -			
uments\Interactive Documents\Backup		Document Type:	-			
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Sprint		Cabinet:				
Customer Address Change Verification Letter.do	o	do	lo	do	Read only document type and cabinet:	No 👻
Customer Contact Change Form.docx		Document Merge Prompts				
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🕈 Add 📝 Edit ᅟ 🕷 Delete				
Customer Contact Change Form.docx uments/Interactive Documents/Sprint		Label The Format The Display Option	ns Th Default Value Th Required Th Toke			
Date format test.docx uments\Interactive Documents\Sprint						
DDA Account Review and Welcome Letter.docx rge Documents/Interactive Documents	v					
• 100 11 1 •		4				

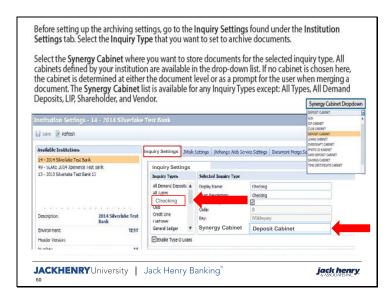
The documents listed in the Available Documents section are the document templates available in your institution for Document Merge. These documents are stored in the template path locations that are specified in the Template Path Settings section.

Institution Settings JWalk Settings jXchange Web Service Settings Document Merge Settings Template Path Settings OVATION Interactive Documents: \\IDEFS01.jhaide.com\Xperience Merge Documents\Interaction System Documents: Address Change Verification Letter \\DIEFS01.jhaide.com\Xperience Merge Documents\System Available Documents <<Custing.ComName>> Cobiz - OD Account Action Required.docx ...uments\Interactive Documents\Backup <<CustInq.AddrLine2>> Cobiz - OD Account Action Required.docx ...uments\Interactive Documents\Sprint <<CustInq.AddrLine3>> Customer Address Change Verification Letter.do ...rge Documents\Interactive Documents Dear <<<u>Custing.FirstName</u>>> Customer Contact Change Form.docx ...rge Documents\Interactive Documents Customer Contact Change Form.docx ...uments\Interactive Documents\Backup In the interest of exceeding your expectations with regards to your Ovation Bank customer service Customer Contact Change Form.docx ...uments\Interactive Documents\Sprint experience, please verify that your address has changed as per your instructions. If you should notice any discrepancies, please contact me so that I can correct for you immediately. Date format test.docx .uments\Interactive Documents\Sprint I truly appreciate the opportunity to serve you with your financial relationship. DDA Account Review and Welcome Letter.dooxrge Documents/Interactive Documents ►

You can double-click these document templates to view and edit them in the document viewer used by your institution, such as Microsoft Word. This is helpful when adding institution-defined field tokens to document templates that have been created in the Document Merge Prompts section.

Franklin Ball California			
Template Path Settings			
Interactive Documents:			
\\IDEFS01.jhaide.com\Xperience Merge Documents\In	ntera	tive Documents\	
System Documents:			
\\DIEFS01.jhaide.com\Xperience Merge Documents\S	ysten	Documents\	
Available Documents		n	
Available Documents		Document Archiving	
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Backup		Archive:	No 👻
Cobiz - OD Account Action Required.docx		Document Type:	
uments\Interactive Documents\Sprint		Cabinet:	
Customer Address Change Verification Letter.do rge Documents\Interactive Documents	etter.do	Read only document type and cabinet:	No
Customer Contact Change Form.docx rge Documents\Interactive Documents		Document Merge Prompts	
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🕈 Add 📝 Edit 🗴 Delete	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label The Format The Display Options	Toke
Date format test.docx uments\Interactive Documents\Sprint			
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents	w		
4		4	

The document selected in the Available Documents section displays the archiving options if any have been entered. You can establish archive settings for merge documents if your institution uses a content management system, such as Synergy.



Before setting up your archiving settings, go to the Inquiry Settings under the Institution Settings tab. Select the Inquiry Type you want to set to archive documents. Then choose the Synergy Cabinet where you want to store the documents for the selected inquiry type. All cabinets defined by your institution are available in the drop-down list. If no cabinet is chosen here, the cabinet is determined at either the document level or as a prompt for the user when merging a document. The Synergy Cabinet list is available for any Inquiry Types except: All Types, All Demand Deposits, LIP, Shareholder, and Vendor

Template Path Settings			
Interactive Documents:			
\\IDEFS01.jhaide.com\Xperience Merge Documents\	Intera	tive Documents\	
System Documents:			
\\DIEFS01.jhaide.com\Xperience Merge Documents\	Systen	Documents\	
Available Documents		Document Archiving	
Cobiz - OD Account Action Required.docx		Archive:	Yes
uments\Interactive Documents\Backup		Document Type:	Yes
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Sprint		Cabinet:	No
Customer Address Change Verification Letter.c rge Documents\Interactive Documents	lo	Read only document type and cabinet:	Prompt
Customer Contact Change Form.docx rge Documents\Interactive Documents		Document Merge Prompts	
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🏝 Add 📝 Edit 🕷 Delete	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label The Format The Display Opti	ions The Default Value The Required The Toke
Date format test.docx uments\Interactive Documents\Sprint			
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents			
a sector t			

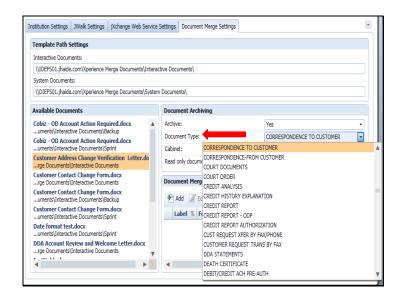
The Archive field lets you choose whether you want to archive the document selected from the Available Documents list. The archive prompt defaults to No. Available options are: Yes, No, and Prompt.

When Yes is selected the document is archived after using the Merge Document or Activity Statement button. If you use the Edit Merge Document button, the Archive Document prompt appears so you can save the document in a different Output Document Path.

When Prompt is selected the Archive Document, prompt appears asking the user to archive the document. Both the Document Type and Cabinet fields are optional, but defaults can be selected. A cabinet may not need to be selected if the cabinet has been established for the inquiry type in Institution Settings. If you use the Edit Merge Document and select a document, an Archive Document prompt appears so you can save the document in a different Output Document Path.

stitution Settings JWalk Settings jXchange Web Se	rvice S	Settings Document Merge Settings							
Template Path Settings									
Interactive Documents:									
\\IDEFS01.jhaide.com\Xperience Merge Documents\Iu	nterac	ive Documents\							
System Documents:									
\\DIEFS01.jhaide.com\Xperience Merge Documents\S	ystem	Documents\							
Available Documents		Document Archiving							
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Backup		Archive:	Yes 🔹						
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Sprint		Docum Document Type is required when Archive is Yes							
Customer Address Change Verification Letter.do		Read only document type and cabinet:	No 👻						
Customer Contact Change Form.docx rge Documents\Interactive Documents									Document Merge Prompts
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🕈 Add 🏼 Zelit 🙀 Delete							
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label T Format T Display Options	The Default Value The Required The Toke						
Date format test.docx uments\Interactive Documents\Sprint									
DDA Account Review and Welcome Letter.docx	v								
▲		•	•						

Once you've selected Yes or Prompt in the Archive field, the Document Type field shows red, indicating that a Document Type is required. If you hover over the red button, a message displays explaining why the field is red.



Use the dropdown box to select an available Document Type to be archived.

Template Path Settings				
Interactive Documents:				
\\IDEFS01.jhaide.com\Xperience Merge Documents\	interac	tive Documents\		
System Documents:				
\\DIEFS01.jhaide.com\Xperience Merge Documents\	System	n Documents\		
Available Documents		Document Archiving		
Cobiz - OD Account Action Required.docx		Archive:	Yes	•
uments\Interactive Documents\Backup obiz - OD Account Action Required.docx		Document Type:	CORRESPONDENCE TO CUSTOMER	•
uments\Interactive Documents\Sprint		Cabinet:	DEPOSIT CABINET	
Customer Address Change Verification Letter.d	o	Read only document type and cabinet:		
Customer Contact Change Form.docx			DEPOSIT CABINET SAVINGS CABINET	
rge Documents\Interactive Documents		Document Merge Prompts	CHRISTMAS CLUB CABINET	
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🕈 Add 📝 Edit 🗱 Delete	TIME CERTIFICATE CABINET	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label T Format T Display Options	SAFE DEPOSIT CABINET SAFE DEPOSIT CLOSED CABINET	
Date format test.docx uments\Interactive Documents\Sprint			DELETED DOCUMENTS	
DDA Account Review and Welcome Letter.docx				
e les train	*			

The Cabinet field is optional if selected in the Inquiry Settings. The cabinets displayed are based on the document type selected. Keep in mind that a document could belong to multiple cabinets, which would need to be determined by the user. For example, the Application document type could belong to either the Deposit Cabinet or the Loans Cabinet.

nstitution Settings JWalk Settings jXchange We	b Service	Settings Document Merge Settings	
Template Path Settings			
Interactive Documents:			
\\IDEFS01.jhaide.com\Xperience Merge Documer	nts\Intera	ctive Documents\	
System Documents:			
\\DIEFS01.jhaide.com\Xperience Merge Documer	its\Systen	n Documents\	
Available Documents		Document Archiving	
Cobiz - OD Account Action Required.docx		Archive:	Yes 🔹
uments\Interactive Documents\Backup		Document Type:	CORRESPONDENCE TO CUSTOMER -
Cobiz - OD Account Action Required.docx uments\Interactive Documents\Sprint		Cabinet:	DEPOSIT CABINET
Customer Address Change Verification Lette rge Documents\Interactive Documents	er.do	Read only document type and cabinet:	No
Customer Contact Change Form.docx rge Documents\Interactive Documents		Document Merge Prompts	Yes No
Customer Contact Change Form.docx uments\Interactive Documents\Backup		🕈 Add 📝 Edit ᅟ 🕷 Delete	
Customer Contact Change Form.docx uments\Interactive Documents\Sprint		Label T Format T Display O	Options T Default Value T Required T Toke
Date format test.docx uments\Interactive Documents\Sprint			
DDA Account Review and Welcome Letter.do rge Documents\Interactive Documents	vcx 🖉		
* 100 H L H		4	

The Read Only Document Type and Cabinet field allows you to set the document to Read Only by selecting Yes or No. When set to No, users cannot change the Document Type or Cabinet. If the Document Type and Cabinet fields are not established for a document at this level, they are required via a prompt when clicking Merge Document on an inquiry tab or the Activity Statement button on the History tab. Documents are then added to the cabinets and indexed with information gathered from the account or customer, such as the account number, account type, customer number, or tax ID.

titution Setting	2 Walk Setting: Schange Web Service Setting: Document Merge Setting:	
Settings for	NetTeller service	
Service URL:		
Uper Name:		
Password:		
Environments		
Settings for	image service 🚽 🗕	
Service URL:	https://wchange.mousailadNorthing	
Uper Name:	ovc-SynergyFroduct@jhacorp.com	
Password:	•••••	
Environment:		
Settings for	VR service	

The Settings for Image Service on the jXchange Web Service Settings tab must be filled out and the current user must have access to Synergy to view the Synergy Cabinet drop-down list for a Selected Inquiry Type on the Institution Settings tab.

stitution Settings JWalk Settings	jXchange Web Ser	vice Settin	gs Document Merge Settings		
Template Path Settings					
Interactive Documents:					
\\IDEFS01.jhaide.com\Xperience M	/erge Documents\In	teractive D	ocuments\		
System Documents:					
\\DIEFS01.jhaide.com\Xperience	lerge Documents\Sy	stem Docu	ments\		
Available Documents		Do	cument Archiving		
Customer Contact Change Form		Arc	hive:	No	•
uments\Interactive Documents\S Date format test.docx	test.docx eractive Documents\Sprint t Review and Welcome Letter.docx		cument Type:		Ŧ
uments\Interactive Documents\S			pinet:		
DDA Account Review and Welc			ad only document type and cabinet:	No	Ŧ
InstFields.docx rge Documents\Interactive Docur	nents	Do	cument Merge Prompts		
InstFields.docx uments\Interactive Documents\S	print	4	Add 📝 Edit 🕷 Delete		
Ovation Bank Safe Deposit Box rge Documents\Interactive Documents			Label T Format T Display Op	tions The Default Value The Required The	Toke
Welcome Letter.docx uments\Interactive Documents\B	ackup				
Welcome Letter.docx uments\Interactive Documents\S	print	v			
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Document Merge Prompts can be set up to allow your users to input data prior to printing and saving merge documents. Select the document from the Available Documents list to create the Prompt.

Template Path Se	ttings									
Interactive Docume	ants:									
\\IDEFS01.jhaide.o	com\Xperier	ice Merge D	cuments\Int	eractive Doc	:uments\					
System Documents										
\\DIEFS01.jhaide.o	com\Xperier	ice Merge D	cuments\Sys	tem Docum	ents\					
Available Docum	Docun	ient Me	rge Pron	nnts						
Customer Conta	Docum	ient rie	IYE FION	iipts	_					
uments\Interact	🕈 🛉	dd 📝	Edit 🙎	Delete						
Date format tes uments\Interact		hel T	Format	T. Dis	play Options	T. Def	ault Value	T. Ren	wired T	Token
DDA Account Re	-	iber ip	Tormat	17 013	ping options	IF DC	uun vulue	i neq	uncu ii	TORCH
rge Documents										
InstFields.docx										
rge Documents\ InstFields.docx										
uments\Interact	4									Þ
Ovation Bank Sa rge Documents\										
Welcome Letter.	docx									
uments\Interactiv		its\Backup								
Welcome Letter.o		tal Cariat								
uments\interacti	/e Documen	its (Sprint		V						
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You can use the toolbar options in this section to Add, Edit, or Delete any fields in a prompt for adding institution-defined information to a document template during merging.

			Add Docume	ent Merge Prompt 🛛 🗙
Template Path Settings				ant Merge Prompt A
Interactive Documents:			Label:	
\\IDEFS01.jhaide.com\Xperience Merge Documents\Iu	Format:	Currency -		
System Documents:			Required Field: Default Value:	No •
\\DIEFS01.ihaide.com\Xperience Merge Documents\S	unton	Documentel	Token:	\$0.00 < <prompt:>></prompt:>
(IDTEL 301.)halde.com/xpenence Herge Documents/3	ysten	r bocuments (TOKUT.	Scrompuss
Available Documents		Document Archiving		
Customer Contact Change Form.docx		Archive:		
uments\Interactive Documents\Sprint		Document Type:		
Date format test.docx uments\Interactive Documents\Sprint		Cabinet:		
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents		Read only document type	a	
InstFields.docx rge Documents\Interactive Documents		Document Merge Prom		OK Cancel
InstFields.docx uments\Interactive Documents\Sprint		🕈 Add 🏼 Edit 🕱 I	Delete	
Ovation Bank Safe Deposit Box Entry Form.docx	r i	Label T Format	The Display Options The Defau	It Value T Required T Toke
Welcome Letter.docx uments\Interactive Documents\Backup				
Welcome Letter.docx uments\Interactive Documents\Sprint	¥			
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When you select Add a pop-up box is provided to create the Prompt. First, enter an identifying Label.

Template Path Settings			Add Doc	ument Merge Prompt
Interactive Documents:			Label:	Branch:
\\IDEFS01.jhaide.com\Xperience Merge Documents\I	ntera	tive Documents\	Format:	Currency Currency
System Documents:			Required Field: Default Value:	Date
\\DIEFS01.jhaide.com\Xperience Merge Documents\S	Systen	Documents\	Token:	Interest Rate Text
Available Documents		Document Archiving		Combo Box Yes/No
Customer Contact Change Form.docx uments\Interactive Documents\Sprint	۸	Archive:		
Date format test.docx uments\Interactive Documents\Sprint		Document Type: Cabinet:		
DDA Account Review and Welcome Letter.docx		Read only document type		
InstFields.docx		Document Merge Prom		OK Cancel
InstFields.docx uments\Interactive Documents\Sprint		🕈 Add 🎽 Edit 🕷	Delete	
Ovation Bank Safe Deposit Box Entry Form.doc rge Documents\Interactive Documents	¢	Label 🌾 Format	The Display Options The D	Default Value T Required T Toke
Welcome Letter.docx uments\Interactive Documents\Backup				
Welcome Letter.docx uments\Interactive Documents\Sprint	V			
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The Format field allows you to select the type of format to be used. The dropdown list provides the available selections to choose from.

Template Path Settings			Add Documen	t Merge Prompt
Interactive Documents:			Label:	Branch:
			Eaber:	branch:
\\IDEFS01.jhaide.com\Xperience Merge Documents\I	nterac	tive Documents\	Required Field:	
System Documents:			Default Value:	No res
\\DIEFS01.ihaide.com\Xperience Merge Documents\S	System	Documents\	Token:	No
			loken:	
Available Documents		Document Archiving		
Customer Contact Change Form.docx		Archive:		
uments\Interactive Documents\Sprint		Document Type:		
Date format test.docx		· · · · / · · ·		
uments\Interactive Documents\Sprint		Cabinet:		
DDA Account Review and Welcome Letter.docx rge Documents\Interactive Documents		Read only document type		
InstFields.docx rge Documents\Interactive Documents		Document Merge Pron		OK Cancel
InstFields.docx uments\Interactive Documents\Sprint		🕈 Add 🏼 Edit 🕷	Delete	
Ovation Bank Safe Deposit Box Entry Form.doc rge Documents\Interactive Documents	c	Label The Format	The Display Options The Defau	t Value T Required T Tok
Welcome Letter.docx uments\Interactive Documents\Backup				
Welcome Letter.docx uments\Interactive Documents\Sprint	V			

The Required field allows you to make a field required or optional by selecting Yes or No.

emplate Path Settings					Add Docume	ent Merge Prompt	×
Interactive Documents:	Label:		Branch:				
\\IDEFS01.jhaide.com\Xperience Merge Documents\J	Format		Text	-			
System Documents:				Require		No	•
\\DIEFS01.jhaide.com\Xperience Merge Documents\	Systen	n Docume	nts\	Token:		< <prompt:bra< td=""><td>nch:>></td></prompt:bra<>	nch:>>
Available Documents		Docur	nent Archiving				
Customer Contact Change Form.docx uments\Interactive Documents\Sorint		Archiv	. /				
Date format test.docx uments\Interactive Documents\Sprint		Docun	ient Type: +				
DDA Account Review and Welcome Letter.docx			nly document type				
InstFields.docx rge Documents\Interactive Documents		Docur	ent Merge Pron			ок	Cancel
InstFields.docx uments\Interactive Documents\Sprint		₽ A	dd 🛛 Edit 🕷	Delete			
Dvation Bank Safe Deposit Box Entry Form.doc rge Documents\Interactive Documents	¢	Li	abel Ђ Format	T _b Displ	ay Options T Defa	ult Value 🍈 Required	Toke
Welcome Letter.docx uments\Interactive Documents\Backup							
Welcome Letter.docx uments\Interactive Documents\Sprint	v						
4		4					

The Token you are entering automatically displays as you create it. Select OK to complete your entry.

stitution Settings JWalk Settings jXcha	nge Web Service Settings Document Merge Settings	
Femplate Path Settings		
Interactive Documents:		
\\IDEFS01.jhaide.com\Xperience Merge D	ocuments\Interactive Documents\	
System Documents:		
\\DIEFS01.jhaide.com\Xperience Merge D	ocuments\System Documents\	
Available Documents	Document Archiving	
Customer Contact Change Form.d	Archive:	No 👻
uments\Interactive Documents\Sprin Date format test.docx	Document Type:	·
uments\Interactive Documents\Sprin	Cabinet:	
DDA Account Review and Welcom rge Documents\Interactive Documen	Read only document type and cabinet:	No
InstFields.docx rge Documents\Interactive Documen	Document Merge Prompts	
InstFields.docx uments\Interactive Documents\Sprin	街 Add 🏼 🖉 Edit 🗱 Delete	
Ovation Bank Safe Deposit Box En rge Documents\Interactive Documen	Label To Format To Display Options To D	efault Value T, Required T, Token T,
Welcome Letter. uments\Interactive Documents\Back	Branch: Text	<pre>></pre>
Welcome Letter.docx uments\Interactive Documents\Sprin		

The new Token displays and can be selected to Edit or Delete.

Template Path Settings				
Interactive Documents:		Edit Doc	ument Merge Prompt	×
\\IDEFS01.jhaide.com\Xperience Merge Do	cuments\Interactive Documents\	Label.		
System Documents:		Label:	Original Contract Date	
\\DIEFS01.jhaide.com\Xperience Merge Do	cuments\System Documents\	Format:	Date	•
		Default to Today:	No	•
Available Documents	Document Archiving	Required Field:	No	•
Customer Contact Change Form.d 🔺	Archive:	Display Options:	04/02/2015	-
uments\Interactive Documents\Sprin Date format test.docx	Document Type:	Token:	04/02/2015	
uments\Interactive Documents\Sprin	Cabinet:		April 02, 2015	
DDA Account Review and Welcom	Read only document type and cabinet		02-Apr-15 04/02/15	
InstFields.docx rge Documents\Interactive Documen	Document Merge Prompts		04/2015 04/15	
InstFields.docx uments\Interactive Documents\Sprin	🕈 Add 🏼 Edit 🗱 Telete		02/04/2015 02/04/15	
Ovation Bank Safe Deposit Box En rge Documents\Interactive Documen	Label T. For		02/04/15	
Welcome Letter.docx	Branch: Text			
uments\Interactive Documents\Back Welcome Letter.docx	Original Contract Date Date		ОК С	Cancel
uments\Interactive Documents\Sprin	Current Money Market Rate Rate	2 Decimals	0.000000%	

If the format selected is Date, additional fields are available to default the current date and how the date is displayed.

Template Path Settings		Edit Doc	ument Merge Prompt X	
Interactive Documents:		Label:		
\\IDEFS01.jhaide.com\Xperience Merge D	ocuments\Interactive Documents\		Current Money Market Rate	
System Documents:		Format:	Interest Rate 🔹	
\\DIEFS01.jhaide.com\Xperience Merge D	ocuments\System Documents\	Required Field:	No 👻	
		Display Options:	2 🔹	
Available Documents	Document Archiving	Default Value:	0.000000	
Customer Contact Change Form.de Auments\Interactive Documents\Sprin	Archive: Document Type:	Token: < <prompt:current Market Rate>></prompt:current 		
Date format test.docx uments\Interactive Documents\Sprin	Cabinet:			
DDA Account Review and Welcom rge Documents\Interactive Documen	Read only document type and cabinet:			
InstFields.docx rge Documents\Interactive Documen	Document Merge Prompts			
InstFields.docx uments\Interactive Documents\Sprin	🖗 Add 📝 Edit 🕷 Delete			
Ovation Bank Safe Deposit Box En rge Documents\Interactive Documen	Label			
Welcome Letter.docx uments\Interactive Documents\Back	Original Contract Date		OK Cancel	
Welcome Letter.docx	Current Money Market Rate	Rate 2 De	cimals 0.000000%	
uments\Interactive Documents\Sprin 🚽	Do you want information on Loan	Products Combo		

If the format selected is for an Interest Rate, additional fields are available to display the number of decimal places and a default value.

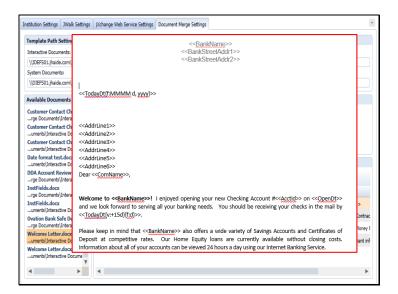
	nge Web Service Settings Document M		dit Documen	t Morgo D	romnt >
Femplate Path Settings			uit Documen	t rierye r	rompt 7
Interactive Documents:		Label:		Do you wa	ant information on Loa
\\IDEFS01.jhaide.com\Xperience Merge Do	ocuments\Interactive Documents\	Format:		Combo Bo	x •
System Documents:		Required Field:		Yes	
\\DIEFS01.jhaide.com\Xperience Merge Do	ocuments\System Documents\	Token:			Prompt:Do you want
		TOKCH		info	rmation on Loan
Available Documents	Document Archiving			Proc	lucts>>
Customer Contact Change Form.d(Auments\Interactive Documents\Sprin	Archive:	Add List Item			
Date format test.docx	Document Type:	Add List Item			
uments\Interactive Documents\Sprin	Cabinet:		Label		Text
DDA Account Review and Welcom	Read only document type and cabine	: ×	Yes		Yes
InstFields.docx rge Documents\Interactive Documen	Document Merge Prompts	×	No		No
InstFields.docx uments\Interactive Documents\Sprin	🖗 Add 📝 Edit 🕷 Delete				
Ovation Bank Safe Deposit Box En rge Documents\Interactive Documen	Label				
Welcome Letter.docx uments\Interactive Documents\Back	Current Money Market Rate				0K Cancel
Welcome Letter.docx uments\Interactive Documents\Sprin	Do you want information on Loan	Products Combo			
<pre> *</pre>					

If the Combo Box is the selected format, an additional Add List Item field is provided to enter the choices you want users to select from.

stitution Settings	smalk Detuligs	jXchange Web Service Settings	oocument Herge Settings				
Template Path S	ettings						
Interactive Docun	ients:						
\\IDEF501.jhaide	.com\Xperience M	lerge Documents\Interactive Docu	iments\				
System Document							
\\DIEF501.jhaide	.com\Xperience M	lerge Documents\System Docume	nts\				
Available Docun	ients	Document Archiving					
Customer Conta		Archive:		No			•
Customer Conta		Document Type:					Ŧ
uments\Interad		Cabinet:					-
Customer Conta uments\Interad		Read only document type and ca	abinet:	No			
Date format tes uments\Interad		Document Merge Prompts					
DDA Account Re		🕈 Add 🎽 Edit 🕷 Delete					
InstFields.docx rge Documents		Label	To Format To	Display Optio	ns Th Default Value T	Required	5 Token
InstFields.docx uments\Interad		Branch:	Text				< <prompt:branch:>></prompt:branch:>
uments\Interac Ovation Bank S		Original Contract Date	Date	MM/dd/yyyy			< <prompt:original contra<="" td=""></prompt:original>
rae Documents	Interactive	Current Money Market Rate	Rate	2 Decimals	0.000000%		< <prompt:current money<="" td=""></prompt:current>
Welcome Letter	ive Docume	Do you want information on I	Loan Products Combo			V	< <prompt:do in<="" td="" want="" you=""></prompt:do>
Welcome Letter uments\Interad							
4		4					

Once your field tokens are created, you are ready to add them to the document template you have selected in the Available Documents.

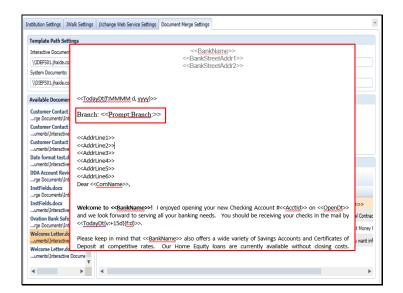
Double-click on the document to open it in your document viewer.



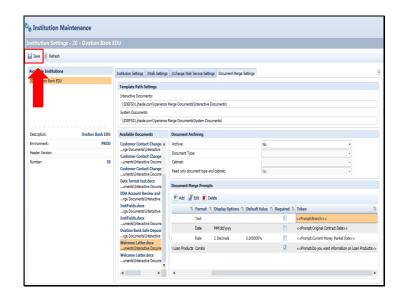
The document opens for you to edit in your document viewer.

stitution Settings	JWalk Settings	jXchange Web Servi	ce Settings	Document Merge Se	ettings				
Template Path S	ettings								
Interactive Docum	ients:								
\\IDEFS01.jhaide	.com\Xperience M	/erge Documents\Inte	ractive Docu	uments\					
System Document	s								
\\DIEFS01.jhaide	.com\Xperience M	lerge Documents\Sys	em Docume	ints\					
Available Docum	ients	Document Archivi	ng						
Customer Conta rge Documents		Archive:			No			•	
Customer Conta		Document Type:						Ŧ	
uments\Interact		Cabinet:						*	
Customer Conta uments\Interact		Read only documen	t type and ca	abinet:	No			*	
Date format tes uments\Interact		Document Merge	Prompts						
DDA Account Re rge Documents		🕈 Add 🛛 🎽 Edit	Delete	1					
InstFields.docx		The Fo	rmat T _b D	isplay Options Tr	Default Value	Tr Required T	Token		1
InstFields.docx		Te	t				< <prompt:branch:>></prompt:branch:>		
uments\Interact Ovation Bank Si		Dai	e M	M/dd/yyyy			< <prompt:original contract="" da<="" td=""><td>Copy Ctrl</td><td>+C</td></prompt:original>	Copy Ctrl	+C
rge Documents	Interactive	e Rat	e 2	Decimals	0.000000%		< <prompt:current marke<="" money="" td=""><td>t Rate>></td><td></td></prompt:current>	t Rate>>	
Welcome Letter		1 Loan Products Cor	nbo			V	< <prompt:do informat<="" td="" want="" you=""><td>ion on Loan Prod</td><td>ucts></td></prompt:do>	ion on Loan Prod	ucts>
Welcome Letter uments\Interact									
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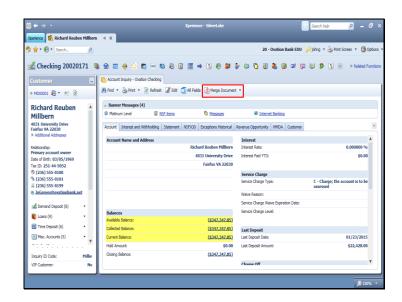
Select the Token for the field you want to add to the document template for merging and rightclick to copy it.



Then paste the token into the document template where you want it to show on the document. In this example, Branch: was entered before the token on the document to describe the field. Once you have added all tokens to the document, be sure and select Save before closing.



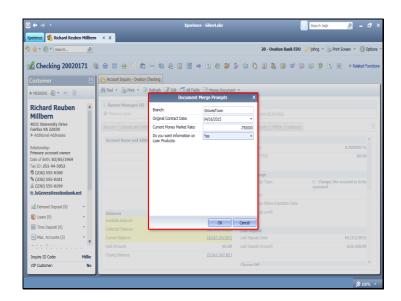
Be sure and click "Save" on the Institution Settings panel toolbar when changes are made, before closing Institution Maintenance.



Once Merge Prompts have been created, select the Merge Document button from inquiry.

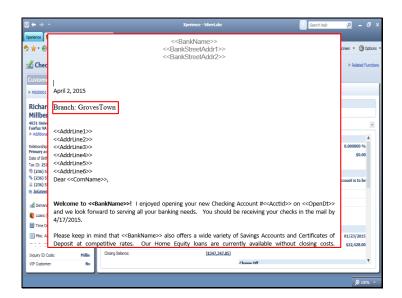
0 ← →	•	Xperience -	SilverLake		? Search help	<u>م</u>	- @ x
Xperience	🛞 Open				×		
S 🖈 - 1	🕤 🕞 - Xperience	Merge Documents • Interactive Documents • Backup	÷ 🙀	Search Backup	2	Print Screen 🔹 🕻	Options
	Organize 👻 New folder			100	• 🔳 🔞	_	
🛃 Ch	🔶 Favorites	Name 1	Date modified	Туре	Size	Relate	ed Functions
Custo		E Cobiz - OD Account Action Required.docx	5/21/2012 9:25 AM	Microsoft Word Doc	24 KB		
► MD000	Documents	Customer Contact Change Form.docx	4/18/2012 9:43 AM	Microsoft Word Doc	28 KB		
- 110000	Music	Welcome Letter.docx	4/2/2015 1:00 PM	Microsoft Word Doc	20 KB		
Rich	E Pictures						
Millb	📑 Videos						
4031 Ur Fairfax	🛤 Computer						*
► Additi	🚢 Local Disk (C:)						
Relations	🙀 Network					0.000000	96
Date of 8	- HERRICH					\$0	.00
Tax ID: 3							
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1 (236						; the account is to	De
🖲 JoGn							
🛃 Dem		<u>•</u>			>		
🔋 Loar	File n	ame:	•	Word documents (.d	ocx) (*.doc 💌		
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🖃 Misc	Accounts (0)	Carrent belance:	(2047,247,02) 1000 0	eposi pare.	11.	01/23/20	015
-111	••••••	Hold Amount:	\$0.00 Last 0	eposit Amount:		\$22,428	.00
Inquiry I	D Code: Millie	Closing Balance:	(\$347,347.85)				
VIP Cust	amer: No		Chan	ne Off			Y
<u> </u>							
JohnG@/hai	de.com (EducationXP Instance) -					۵	100% •

Select the document to print and click Open.



A pop up box is displayed with the Document Merge Prompts that were entered on the document in the Institution Maintenance parameters.

You can enter the information or change any default values and click OK.



The document opens in your document viewer.

Notice in the example, the letter is showing the information entered in the Document Merge Prompt.





The Jack Henry Education team needs your help! If you are willing to lend your assistance by volunteering your knowledge in one of our "Best Practices" Sessions for the upcoming 2015 Banking Educational Conference, you will receive \$100 off of your registration fee. Please contact one of our trainers or email: LMSadmins@jackhenry.com.