CUSTOMER CHANGES:

ADD CUSTOMER

1. From the start up screen, press the ‘Manage Customers’ button
2. In the upper right corner of the ‘Menu’ screen, press the ‘Add New Customer’ button
3. If the customer being added is a staff member for the LLRT Bank, select the ‘Bank Staff’ checkbox. Otherwise, select the ‘Other Customer’ checkbox
4. In the text box next to ‘First Name’, enter the customer’s first name
5. In the text box next to ‘Last Name’, enter the customer’s last name
6. In the text box next to ‘Contact Number’, enter the customer’s contact number
7. If all the details entered are correct, press the ‘Add Customer’ button
8. To confirm that the customer has added correctly, press the ‘Return’ button to return to the ‘Menu’ screen and enter the customer ID given into the ‘Search’ textbox

EDIT CUSTOMER

1. From the ‘Menu’ screen, enter a customer ID number and select the ‘Find Customer’ button. If a customer is found, their details will be displayed.
2. If the customer is found, press the ‘Edit Selected Customer’ button.
3. To make a change, enter the relevant details and select the ‘Save Changes’ button
4. To return to the ‘Menu’ screen, press the ‘Cancel’ button in the lower left corner of the window.

DELETE CUSTOMER

1. From the ‘Menu’ screen, enter a customer ID number and select the ‘Find Customer’ button. If a customer is found, their details will be displayed.
2. If the customer is found, to delete the customer press the ‘Delete Selected Customer’ button.

ACCOUNT CHANGES:

VIEW ACCOUNTS

1. From the start up screen, press the ‘Manage Customer Accounts’ button
2. In the text box next to ‘Customer Number’ enter the customer number of the customer whose accounts you would like to view and press the ‘Search’ button
3. If the relevant customer has any accounts associated to them, they will be displayed. Otherwise, an empty box will be displayed to the user

ADD ACCOUNTS

1. Select the ‘Open New Account’ button on the right side of the ‘Menu’ window
2. In the text box next to ‘Customer ID’, enter the ID number of the customer you would like to add an account for
3. Select either the ‘Omni’, ‘Everyday’, or ‘Investment’ checkbox to select the account type for the new account
4. To add the new account for the customer, press the ‘Add Account’ button

DEPOSIT TO ACCOUNT

1. In the text box next to ‘Customer Number’ enter the customer number of the customer whose account you would like to make a deposit into and press the ‘Search’ button
2. Select the account you would like to make a deposit into in the box on the left side of the window
3. Press the ‘Deposit’ button above the withdraw button
4. Enter the amount to deposit into the account in the textbox that appeared after the button was pressed
5. Press the ‘Deposit’ button to make the deposit. Press the ‘Cancel’ button if you would like to cancel the transaction

WITHDRAWING FROM ACCOUNT

1. In the text box next to ‘Customer Number’ enter the customer number of the customer whose account you would like to make the withdrawal from and press the ‘Search’ button
2. Select the account you would like to make the withdrawal from in the box on the left side of the window
3. Press the ‘Withdraw’ button below the ‘Deposit’ button
4. Enter the amount to withdraw from the selected account in the textbox that appeared after the button was pressed
5. Press the ‘Withdraw’ button the make the withdrawal. Press the ‘Cancel’ button if you would like to cancel the transaction

TRANSFERRING BETWEEN ACCOUNTS

1. In the text box next to ‘Customer Number’ enter the customer number of the customer whose accounts you would like to make transfers between and press the ‘Search’ button
2. Select an account (the account you would like to transfer from) and press the ‘Transfer’ button
3. In the box on the right side of the window, select an account (the account you would like to transfer to)
4. In the textbox that appeared after the second account was selected, enter the amount that you would like to transfer and press the ‘Continue’ button. If you would like to cancel the transaction press the ‘Cancel’ button

CALCULATING AND ADDING INTEREST

1. In the text box next to ‘Customer Number’ enter the customer number of the customer whose account you would like to calculate and add the interest to and press the ‘Search’ button
2. Select the account you would like to calculate the interest for in the box on the left side of the window
3. Press the ‘Add Interest’ button below the ‘Transfer’ button