Metro Bank

John Lee & Ravi Gupta

User Guides

ICS 499

Ryan Hankins

4/3/18

**Index:**

**Introduction**……………………………………………………………………………**I**

**Customer Guide**………………………………………………………………………..**II**

How to login?…………………………………………………………………....Page 3

Account Summary……………………………………………………………….Page 3

Account Statement……………………………………………………………….Page 3

How to add beneficiary?........................................................................................Page 3

How to delete beneficiary?....................................................................................Page 3

How to transfer funds?...........................................................................................Page 4

How to issue ATM card/Cheque book?.................................................................Page 4

How to change your password?.............................................................................Page 4

**Staff Guide**………………………………………………………………………………..**III**

Staff Login Page……………………………………………………………………Page 4

How to approve Beneficiary request?........................................................................Page 4

How to approve Cheque book request?......................................................................Page 5

How to change your password?.................................................................................Page 5

**Admin Guide**……………………………………………………………………………….**IV**

Admin Login Page………………………………………………………………….Page 5

Adding a Staff………………………………………………………………………Page 6

Editing a Staff Member Account…………………………………………………...Page 6

Deleting a Staff Account……………………………………………………………Page 6

Adding a Customer………………………………………………………………….Page 6

How to change your password?..................................................................................Page 7

***Introduction:* I**

Thank You for choosing Metro Bank as your bank. Here you will learn to use our website and our online services we offer to our customers who has an account associated with us. This user guide will help provide understanding of how our online banking website will function.

**Customer Guide: II**

***How to login:***

**Step 1:** Login with your username (email address) and your password provided in the index page.

**Step 2:** If you aren’t able to login to your account and it would show an message saying “Username or password is Incorrect! Please try again!” please contact admin about your issue. If you successfully login into your bank account you should see all the features on the left-hand side that we offer, however you can skip to the next step.

**Step 3:** Scroll all the way down to see your account details. If there is any incorrect information that you were aware of or any changes you want to make in your account details contact admin.

**Step 4:** On the left hand side have features such as your account summary, account statement, adding a beneficiary, viewing your current beneficiary, transferring funds to another person within our bank, issuing a ATM card or cheque book, and changing your passwords.

***Account Summary:*** This will display all of your information including your name, DOB, branch, balance, and account type.

***Account Statement:*** Shows all of your transaction you have made recently.

***How to add beneficiary:***

**Step 1:** Enter Payee name, Account No, and select branch of the person is in. Click Add Beneficiary button.

**Step 2:** Page would be refresh and it will display the status of beneficiary as pending. (You’ll have to wait till staff approves before transferring funds.

***How to delete beneficiary:***

**Step 1:** Select a beneficiary you want to remove from your list.

**Step 2:** A message would pop out and you’ll be redirected back to view your beneficiary’s.

***How to transfer funds:*** \*Requires beneficiary (active) to be able to transfer funds.

**Step 1:** Select a beneficiary you want to transfer fund to.

**Step 2:** Enter the amount you want to transfer.

**Step 3:** Click Transfer. Funds would be processed and will see changes in 2-3 business days in your account statements.

***How to issue ATM card/Cheque book:***

**Step 1:** Select option of what you want to issue (ATM/Cheque).

**Step 2**: Click Issue button.

**Step 3:** Refreshes the page and display status of ATM/Cheque on what you have chosen as pending till staff approves it to be active.

***How to change your password:***

**Step 1:** Enter your old password for account.

**Step 2:** Input a new password and repeat it for the next text area (new password again).

**Step 3:** You’ll be redirected to customer home page (account summary).

***Staff Guide:* III**

***Staff Login Page:***

**Step 1:** In the index page, click staff login tab.

**Step 2:** Enter username and password provided by admin.

**Step 3:** Click login. (You’ll be in your connected to your account).

***How to approve Beneficiary request:***

**Step 1:** Select a customer who requested a beneficiary.

**Step 2:** Click Approve.

**Step 3 :** You’ll be directed back to the staff ATM request page.

***How to approve cheque book request:***

**Step 1:** Select a customer who requested a cheque book.

**Step 2:** Click Approve!

**Step 3:** You’ll be directed back to the staff cheque book request page.

***How to change your password:***

**Step 1:** Enter your old password for account.

**Step 2:** Input a new password and repeat it for the next text area (new password again).

**Step 3:** You’ll be redirected to customer home page (account summary).

***Admin Guide: IV***

***Admin Login Page:***

Step 1: Type on the url: localhost/bank/adminlogin.php to be able to go to the admin login page because it is a hidden page for admins ONLY.

Step 2: Now you should see the admin login page where you can login. Input user and password of admin then login. A pop up message will come up “Login Successful!” and will direct you to the admin home page.

Step 3: After logging in, in the middle section you have a few options to choose from such as adding, deleting, and editing staffs and customers account. This will take affect in the database.

Step 4: On the left side panel, you’ll see Admin Home, Change Password, and Logout. Admin will have the option to change it password as well.

Step 5: Editing and deleting a staff or customers have the same steps.

***Adding a Staff: Admin***

Step 1: You can add a new staff by clicking “Add Staff Member” link and it will direct you to fill out an application.

Step 2: This application includes Staffs name, gender, DOB, Relationship, Department, DOJ, Address, mobile, email ID, and password.

Step 3: After, filling out the form please click the “Add Staff Member” button to add the new staff.

**Editing a Staff Member Account: Admin**

Step 1: Start by clicking “Edit staff member” in the admin homepage.

Step 2: Has a list of staff members and choose a staff you would like to edit. Click “Edit Staff Details”.

Step 3: The staff member who was chosen, his/her personal information will display and you can update any new details if any. Then click “Update Data”.

**Deleting a Staff Account: Admin**

Step 1: Press “Delete Staff”, a list of staff members would appear and choose any staff members who is no longer working for the bank.

Step 2: Click “Delete Staff Details” and it will take affect.

**Adding a Customer: Admin**

Step 1: Input Customers name, gender, DOB, and Nominee.

Step 2: Select the branch where the customer applied for.

Step 3: Select the account type, customer want to open.

Step 4: Enter the amount of funds the customer put in his account.

Step 5: Input the other rest of the information. Then press “Add Customer”.

***How to change your password:***

**Step 1:** Enter your old password for account.

**Step 2:** Input a new password and repeat it for the next text area (new password again).

**Step 3:** You’ll be redirected to customer home page (account summary).