Bank Configuration Portal – User manual

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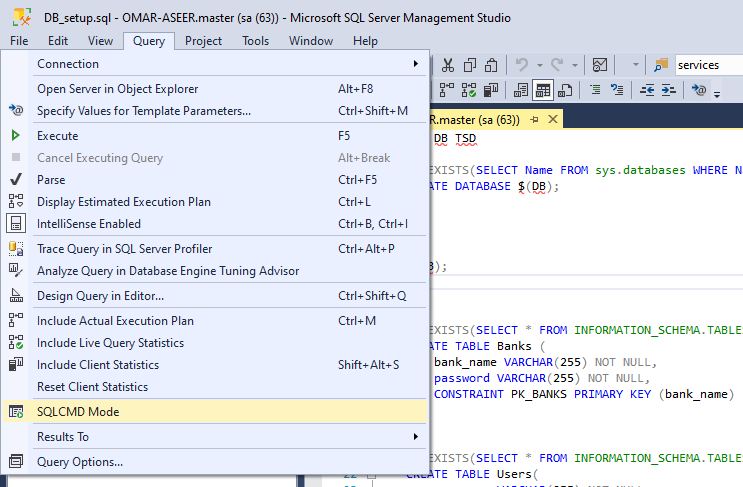
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# First time setup

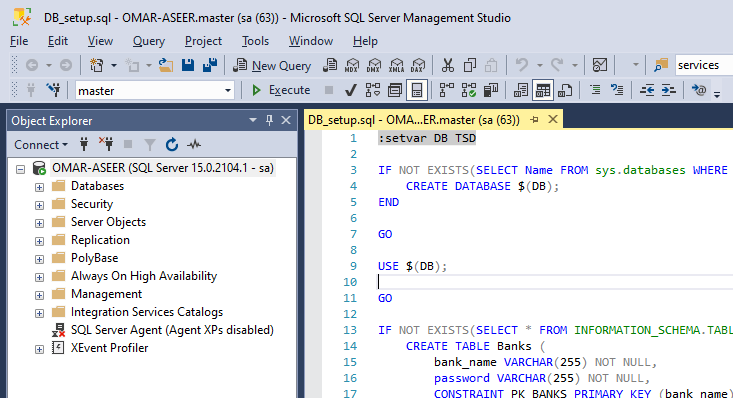
## Database setup

First time setup requires SQL Server Management Studio (SSMS) to be installed on your machine.

Open the file named “DB\_setup.sql” using SSMS, then open the “Query” menu in the menu bar, and click “SQLCMD Mode”.

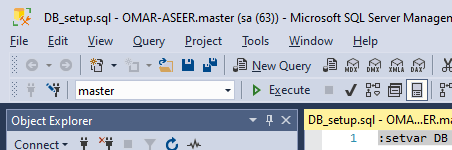


Make sure you’re on the master database, then click “Execute”.

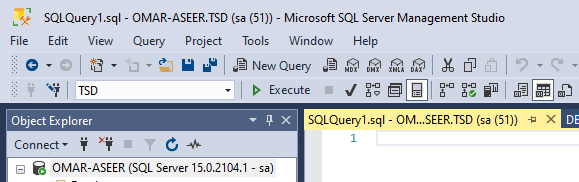


## Registering new users

Registering new users can be done manually using SSMS. Open SSMS and create a new query.



Once you create the query, make sure that it is set to execute on the correct database (TSD by default).



Paste or type the following query into the main window:

INSERT INTO Users (username, password, bank\_name) VALUES ('your\_username', 'your\_password', 'your\_bank\_name');

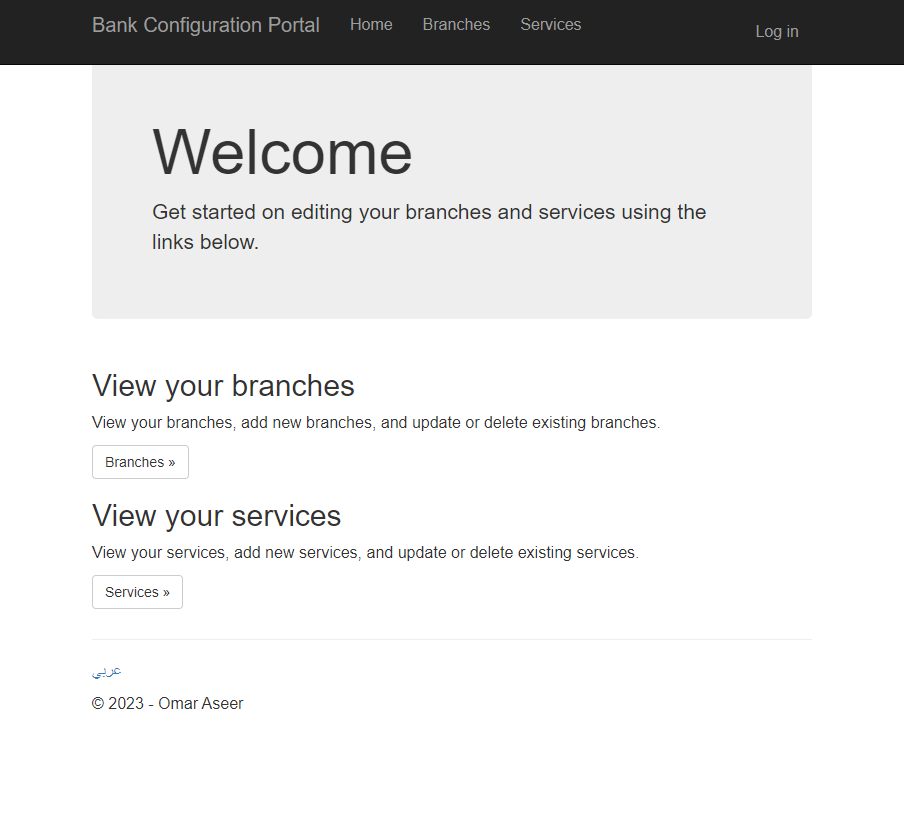
Replace the red text with the desired values. Make sure you keep the single quotes.

For example, to create a user with the username “Omar”, the password “pass1”, and the bank “bank1”, the query should look like this:

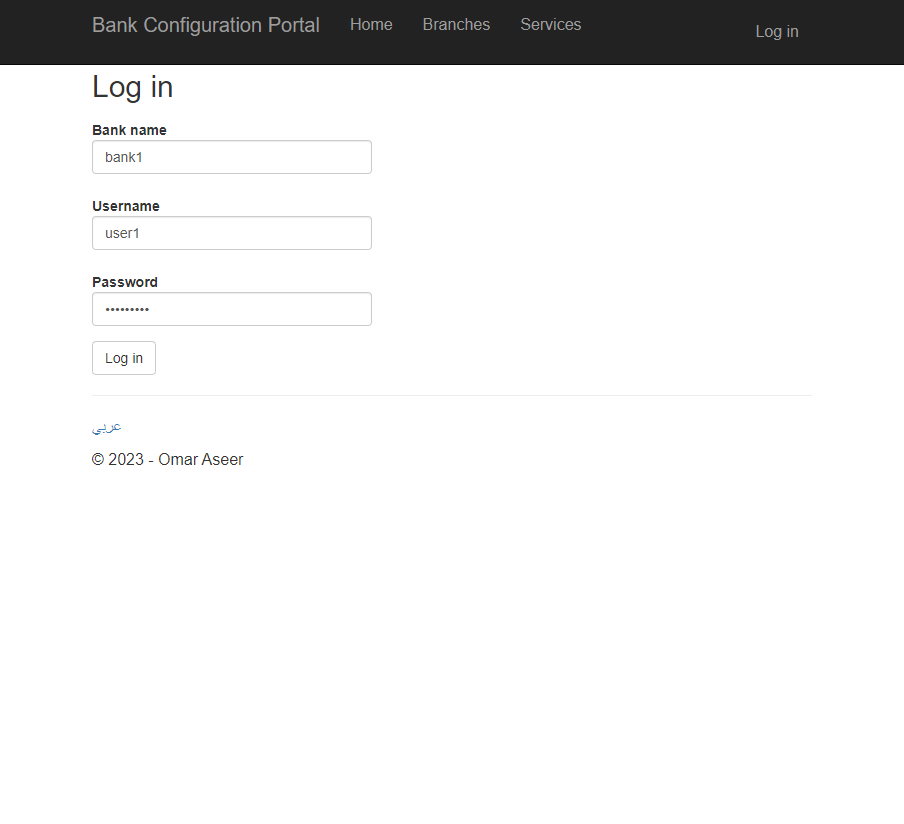
INSERT INTO Users (username, password, bank\_name) VALUES ('Omar', 'pass1', 'bank1');

# Login

To perform any actions, you need to log in.



Enter the name of your bank, your username, and your password, then click “Log in”.

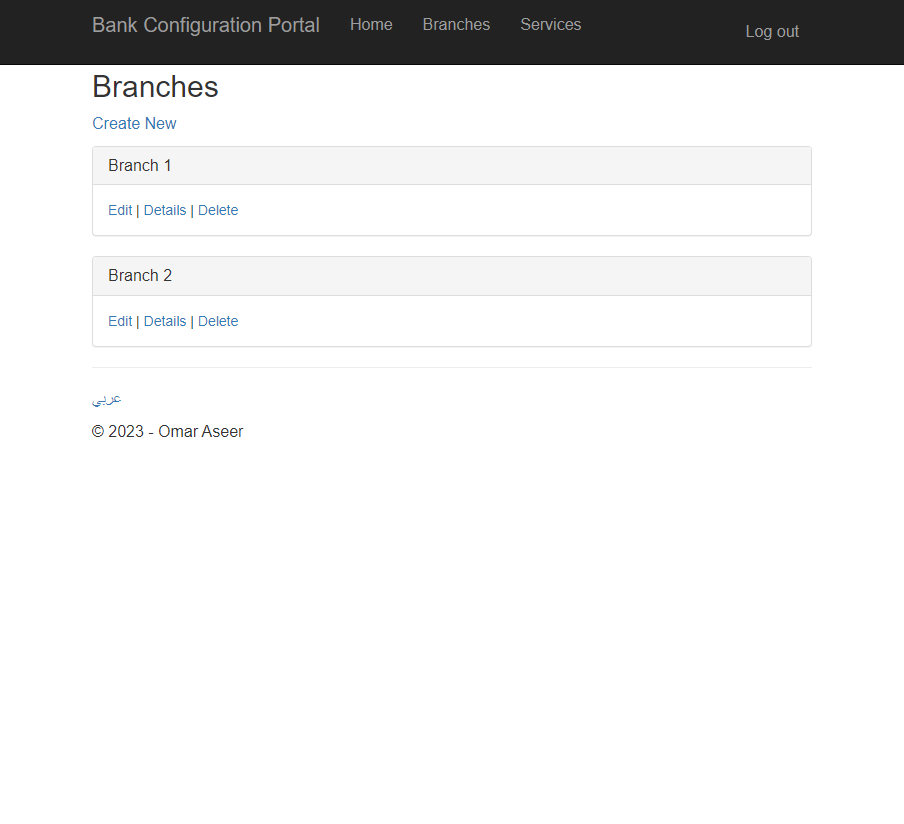


# Branches

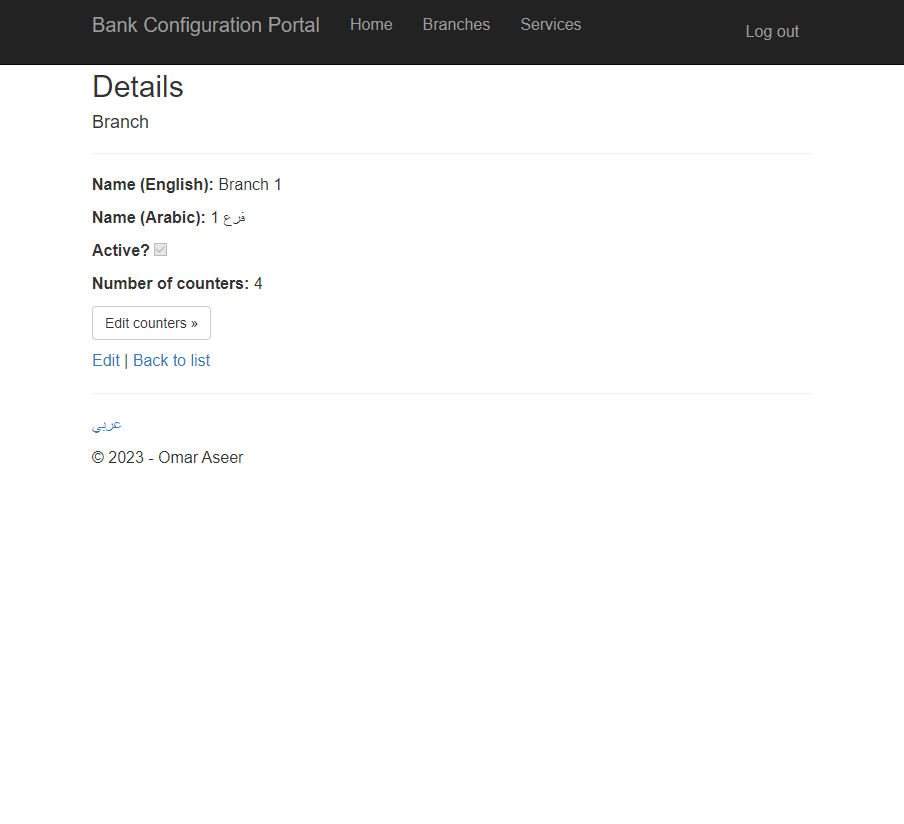
Once you’re logged in, you can view, edit, and delete existing branches, and you can create new branches. Click the link in the navigation bar, or the button on the home page.



Follow the links on screen to edit, delete, or create branches.

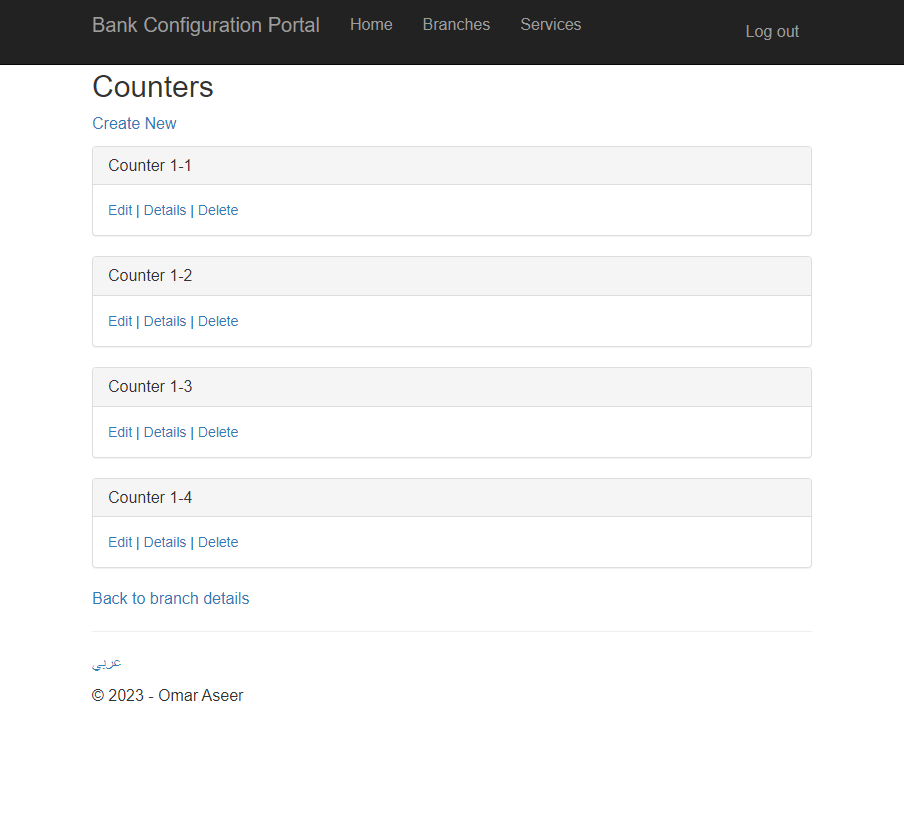


If you want to edit the counters for a specific branch, click the “Details” link for the desired branch, then click “Edit counters”.

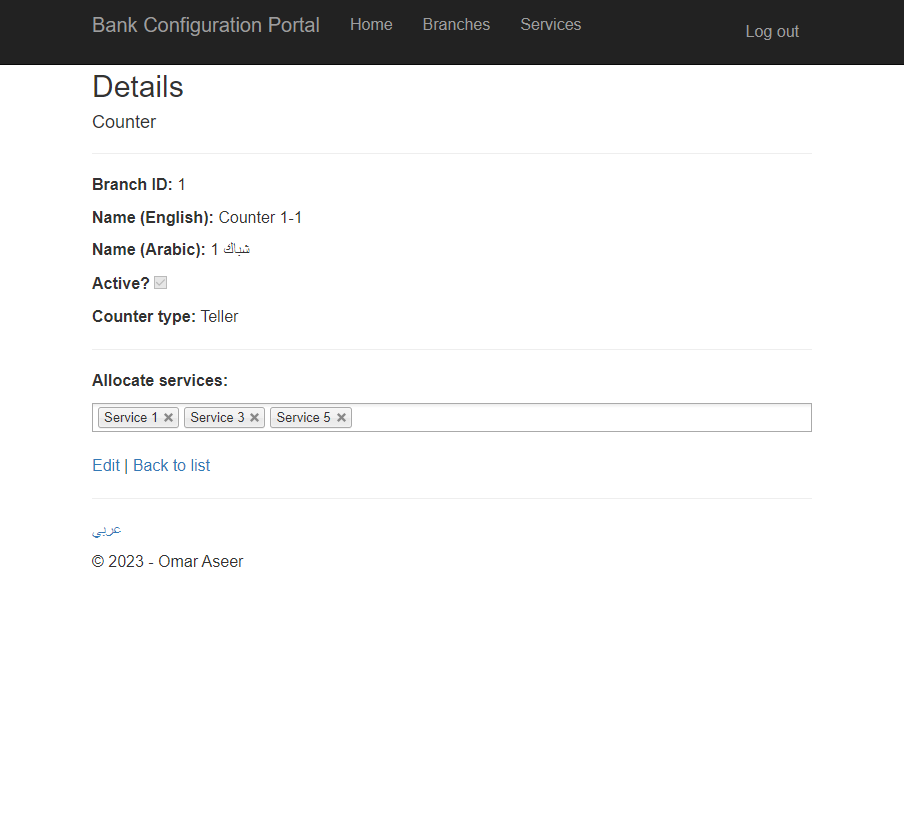


# Counters

Once you’re in the counters page for a specific branch, you can view, edit, and delete existing counters, or add new counters.



If you would like to allocate services for a specific counter, click the “Details” link for the desired counter. Use the drop down to add new services, or click the × symbol to remove services from the counter.



# Services

To view, edit, delete, and add services for your bank, click the link in the navigation bar, or the “Services” button on the home screen.



From the services page, follow the links to add, edit, or delete services.

