Admin Console

Reference Guide

Contents

Disclaimer: The screenshots in this guide are reference only. They may look slightly different in production.

Introduction

What Is Admin Console?

The Admin Console is a new browser-based interface which will allow us to support customers' Digital Banking experience along with the current Matrix Management Console (MMC).

What Will Stay In MMC?

Some of the functionality will become available in Admin Console, which includes:

- SMS Query
- Secure SMS Administration

The rest will remain in MMC.

Member Limit Requests
• Pending Limit Request • Limit Request History
Marketing Campaigns
• New Campaign • Manage Campaigns • Prioritise Campaigns
SMS Query
• SMS Query
Secure SMS Administration
• Secure SMS Administration
Mailbox Administration*
• Message Queue • My Messages
Mailbox*
• My Messages
Security Administration
• VIP Credential Management

SMS notifications sent for a RIM Number will become available in Admin Console.

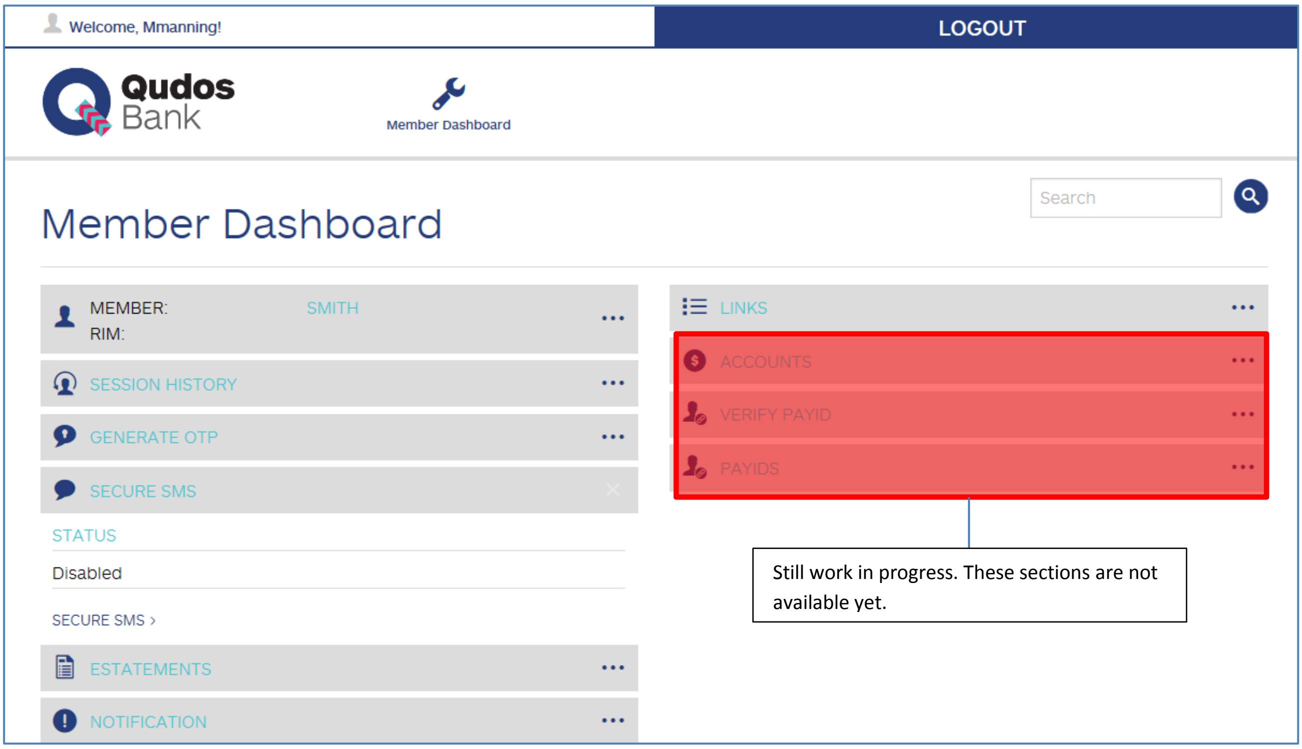
Phone Number based SMS query will still reside in MMC.

Secure SMS Administration will become available to Admin Console.

*Mailbox and additional functionality will potentially become available in Admin Console in the future.

Admin Console

How Can Admin Console Help Us?



I just want to check what activities this customer performed using Online Banking.

I want to do one more ID check using OTP to ensure that I am actually speaking to this customer.

I need to change the customer's QSafe SMS status to 'Unregistered'.

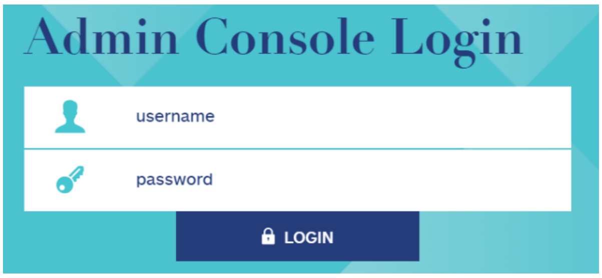
The customer wants me to check if she is meant to receive an email notification after making a Bpay Payment.

I want to find out the customer's saved payees so that I can navigate him on how to make an external transfer quickly.

How to Access Admin Console

How to Access

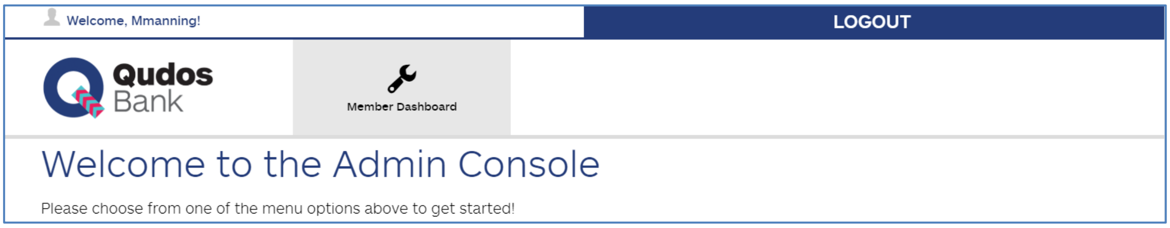
1. Access the Admin Console URL.
2. Enter your username and password.
3. Click ‘LOGIN’.



Admin Console Base

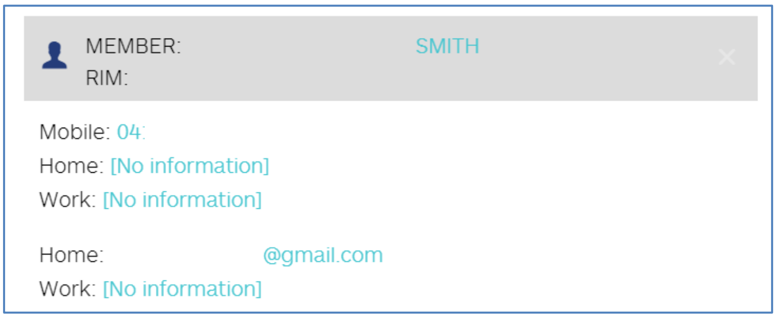
The Base Admin Console will allow us to view customer’s basic information.

1. Click the ‘Member Dashboard’ icon.



2. Enter RIM
3. Click the ‘Search Member’ icon.

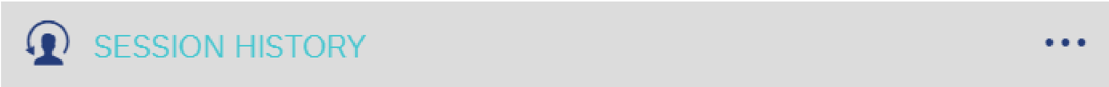
4. Expand the ‘Member’ section to view the customer’s phone number(s) and email address(es).



Tips
• Click ‘LOGOUT’ to end the session • You can always come back to Member Dashboard section by clicking the ‘Member Dashboard’ icon.

Session History

Session History

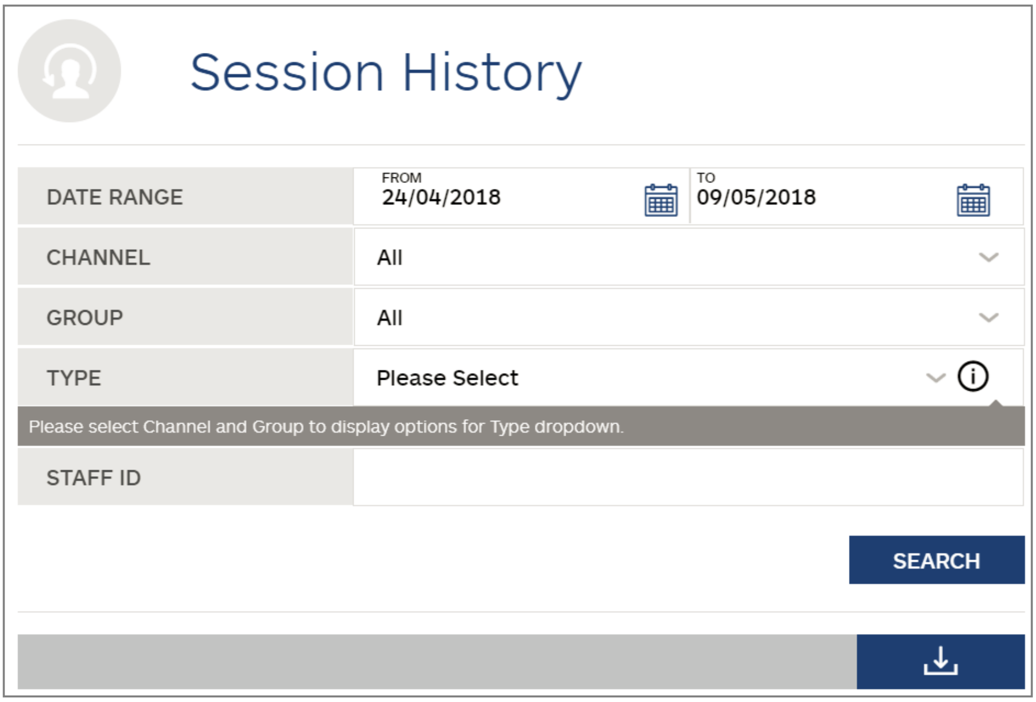


The Session History section can be used to view the log history of:

- Customer's actions performed in Online Banking and Mobile App.
- Our actions performed on behalf of the customer in Admin Console such as OTP Generation, QSafe Status change and notification change.

Steps

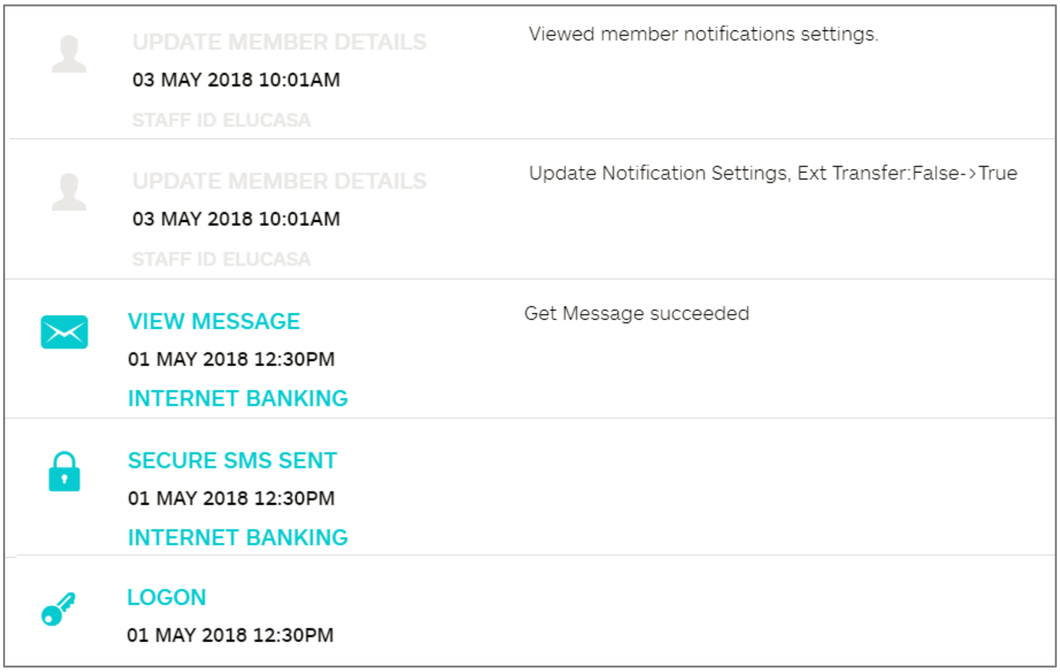
1. Expand the 'Session History' section.
2. Specify the date range.
3. Specify the channel, group, type and staff ID as needed.
4. Click the 'SEARCH' button.
5. The search results will display. Click the 'Export To CSV' button to export the search results to a CSV file.



Tips
• Click the three dots to view the last 5 activities.  • To display sections for the Type dropdown box, you should select Channel and Group first. • You can view the history of last 2 years.

Example

What can you tell from the below search results?



What the records say…

May 1:

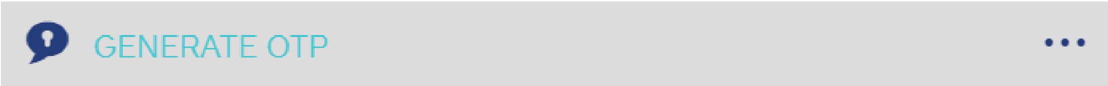
- The customer logged on Online Banking
- A QSafe SMS was sent to the customer.
- The customer viewed the message in Online Banking.

May 3:

- Staff (ID ELUCASA) updated notification settings. Now the customer receives a notification when the customer makes an external transfer.
- The same staff viewed the notification setting.

Generate OTP

Generate OTP



The Generate OTP section allows us to send a One Time Passcode (OTP) to a customer's mobile phone number to verify their identity when talking to them on the phone.

When to Use this Functionality

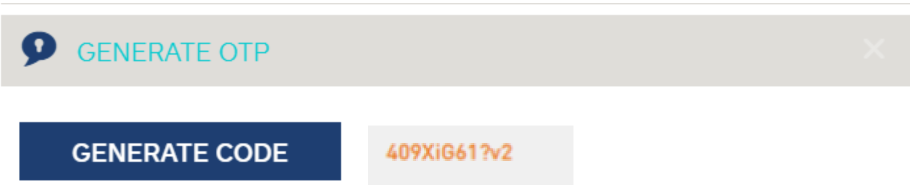
OTP generated by Admin Console could be used as a second form of or additional verification tool especially when you are unsure or should be extra cautious about the identity and bona fide of the customer. OTP could be used as an exception or on a case-by-case basis **only** after you consult or gain approval from your supervisor/branch manager.

Steps

1. Click the three dots to expand the section.

2. Click the 'Generate Code' button.
3. The OTP will be generated, send to the customer and displayed on the screen. You can check if the customer received the same OTP as shown on the screen.

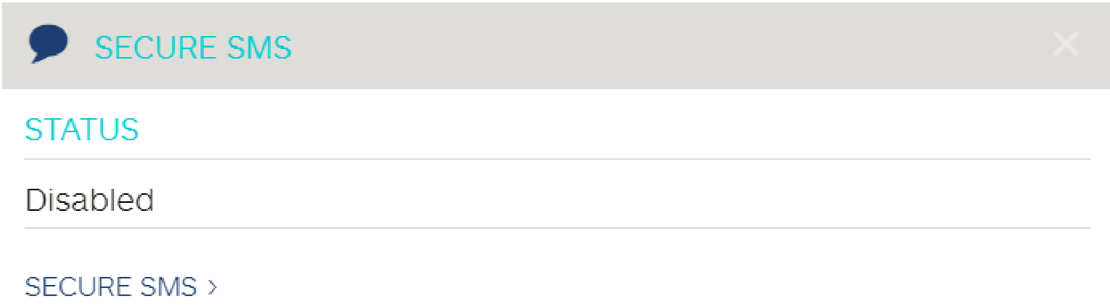
   

4. Record a Prosper notes if the customer passed or failed the OTP ID check. Consult with your supervisor/manager accordingly if there is any suspicious matter.

Tip
• If the customer does not have a mobile number in AP, OTP cannot be generated or sent.  • The Session History section will show the record of when and who generated OTP, however the actual OTP code will not be recorded. 

Secure SMS

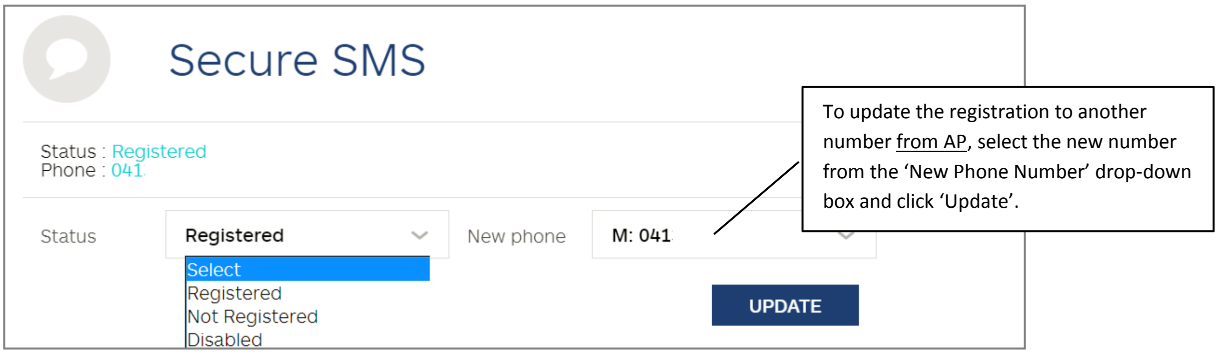
Secure SMS



The Secure SMS (QSafe) functionality is replicated from MMC. There is no change in the current process or procedure.

Steps

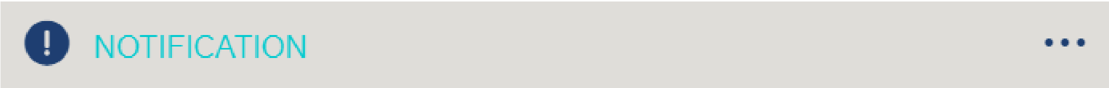
1. Click the ‘Secure SMS’ link.
2. Select the status from the ‘Status’ dropdown box.
3. Click the ‘UPDATE’ button.



Reminder
• **Customer is the only person who can register QSafe. We cannot do it on their behalf.** • We can change the QSafe Status only to ‘Disabled’ or ‘Not registered (Unregister)’ - especially in the event of lost/stolen the QActive (Qudos Bank Mobile App) installed device.

Notifications

Notification

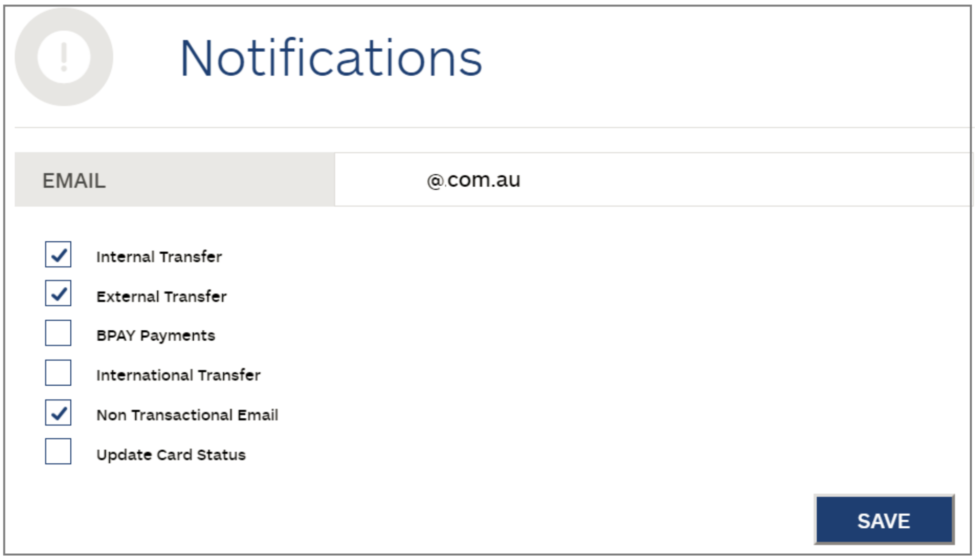


Notification section allows us to view, register, update and de-register the customer's notifications in the Admin Console.

Activities performed by us will be shown in the 'Notifications' section in Online Banking and corresponding activities shown in the customer's Online Banking session history.

Steps

1. Expand the 'Notification' section.
2. The current selection will be displayed.

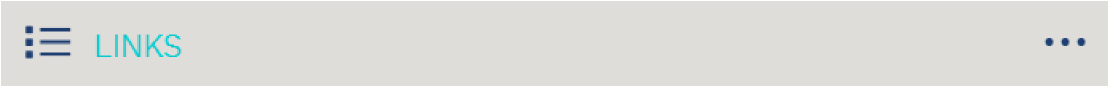


3. Update the selection(s).
4. Click the 'Save' button.

Tips
• Email address can be changed in Admin Console. • Changes done in Admin Console will reflect in Online Banking.

Online Banking Saved Favourite

Online Banking Saved Favourite



This functionality allows us to view the saved favourites of a customer in Admin Console.

The saved favourite payees you can see in Admin Console matches with the list the customer can see in Online Banking.

Steps

1. Click the three dots to expand the 'Link' section.

2. Click the 'Favourites' link.

3. Click the appropriate tab to see the saved favourite payees.