



Admin Console

Reference Guide

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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

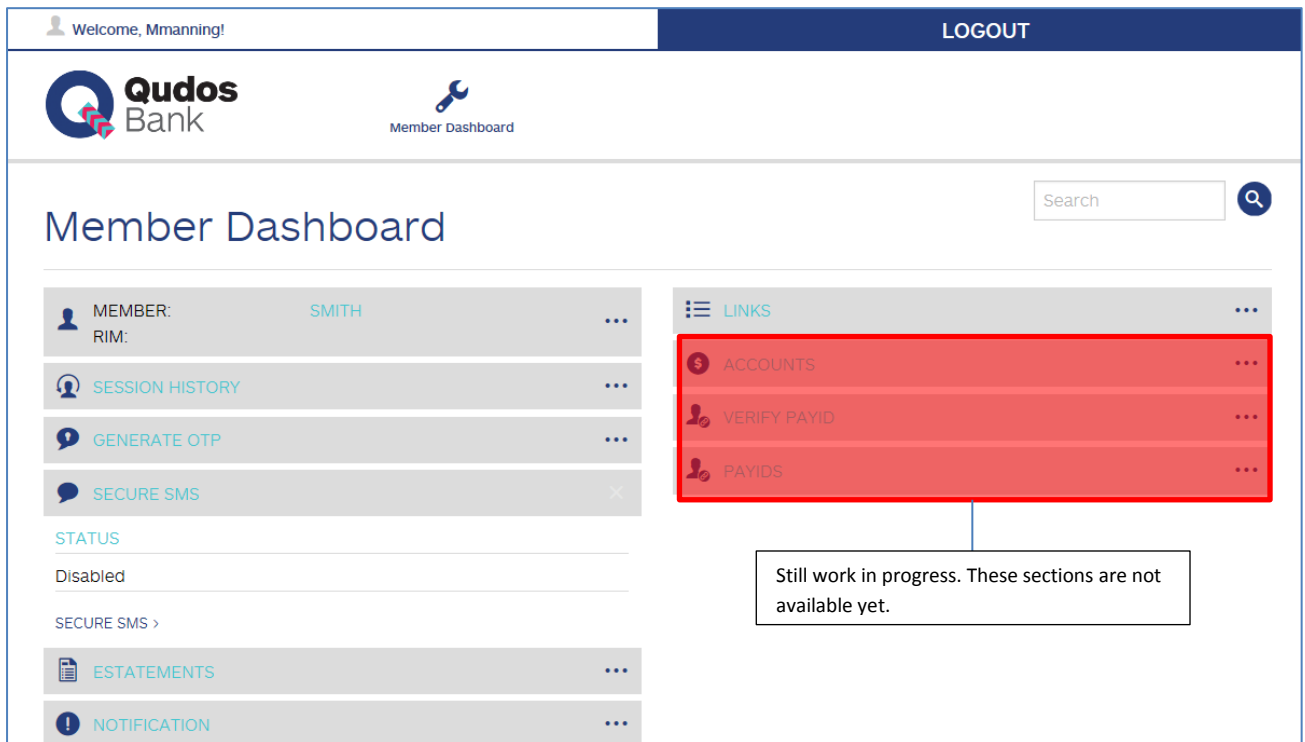
The rest will remain in MMC.

Member Limit Requests	
<ul style="list-style-type: none"> • Pending Limit Request • Limit Request History 	
Marketing Campaigns	
<ul style="list-style-type: none"> • New Campaign • Manage Campaigns • Prioritise Campaigns 	
SMS Query	
<ul style="list-style-type: none"> • SMS Query 	<p>SMS notifications sent for a RIM Number will become available in Admin Console.</p> <p>Phone Number based SMS query will still reside in MMC.</p>
Secure SMS Administration	
<ul style="list-style-type: none"> • Secure SMS Administration 	<p>Secure SMS Administration will become available to Admin Console.</p>
Mailbox Administration*	
<ul style="list-style-type: none"> • Message Queue • My Messages 	
Mailbox*	
<ul style="list-style-type: none"> • My Messages 	
Security Administration	
<ul style="list-style-type: none"> • VIP Credential Management 	

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

Admin Console

How Can Admin Console Help Us?



Welcome, Mmanning! LOGOUT

Qudos Bank Member Dashboard

Member Dashboard

MEMBER: SMITH

RIM: ...

SESSION HISTORY ...

GENERATE OTP ...

SECURE SMS ...

STATUS

Disabled

SECURE SMS >

ESTATEMENTS ...

NOTIFICATION ...

LINKS

- ACCOUNTS ...
- VERIFY PAYID ...
- PAYIDS ...

Still work in progress. These sections are not available yet.

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'.

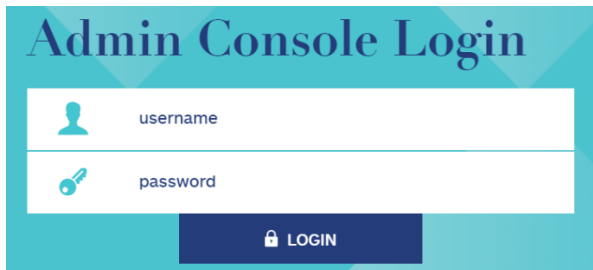
The customer wants me to check if she is meant to receive an email [notification](#) after making a Bpay Payment.

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

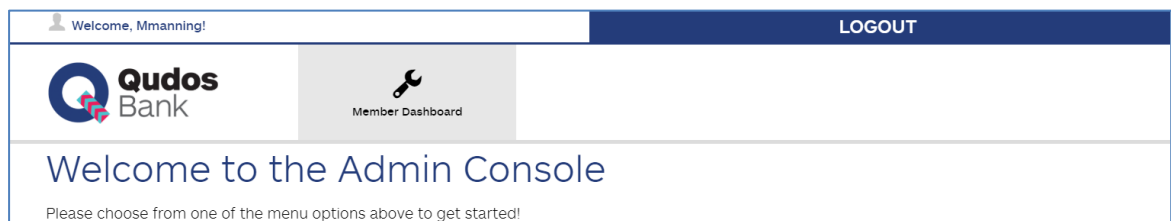
1. Access the Admin Console URL.
2. Enter your username and password.
3. Click 'LOGIN'.



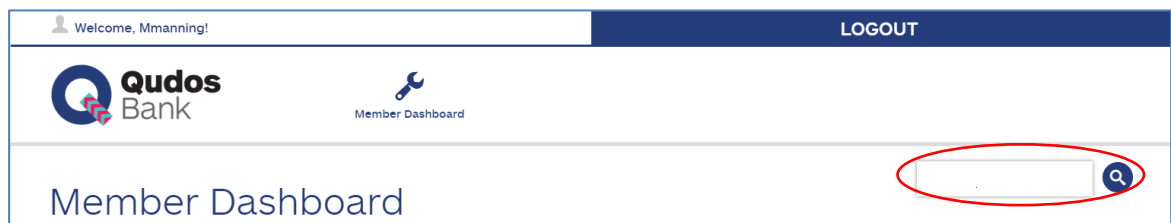
Admin Console Base

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

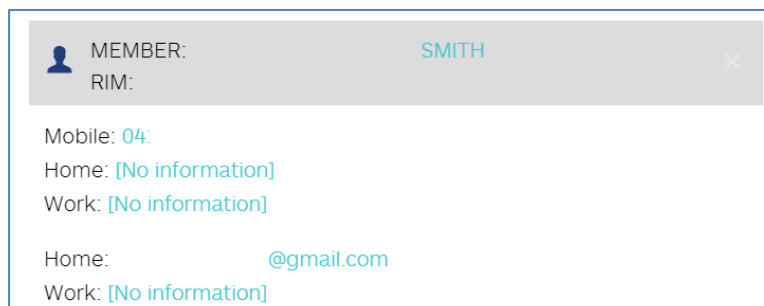
1. Click the 'Member Dashboard' icon.



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.



Session History

DATE RANGE	FROM 24/04/2018 	TO 09/05/2018 
CHANNEL	All ▼	
GROUP	All ▼	
TYPE	Please Select ▼ ⓘ	
Please select Channel and Group to display options for Type dropdown.		
STAFF ID		

SEARCH

↓

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?

	UPDATE MEMBER DETAILS 03 MAY 2018 10:01AM STAFF ID ELUCASA	Viewed member notifications settings.
	UPDATE MEMBER DETAILS 03 MAY 2018 10:01AM STAFF ID ELUCASA	Update Notification Settings, Ext Transfer:False->True
	VIEW MESSAGE 01 MAY 2018 12:30PM INTERNET BANKING	Get Message succeeded
	SECURE SMS SENT 01 MAY 2018 12:30PM INTERNET BANKING	
	LOGON 01 MAY 2018 12:30PM	

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

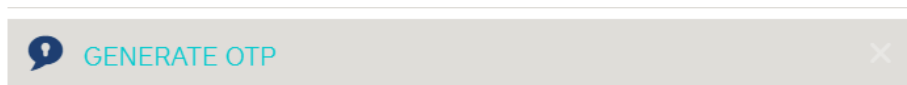
OTP generated by Admin Console could be used as a second form of or additional verification tool especially when you are unsure or should be extra cautious about the identity and bona fide of the customer. OTP could be used as an exception or on a case-by-case basis **only** after you consult or gain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



No mobile phone number has been setup for the member, OTP cannot be sent.

- The Session History section will show the record of when and who generated OTP, however the actual OTP code will not be recorded.



OTP SENT BY SMS
02 MAY 2018 11:46AM
STAFF ID ELUCASA

Generated Otp for Member.

Secure SMS

Secure SMS

SECURE SMS ×

STATUS

Disabled

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.

Secure SMS

Status : Registered
Phone : 041

Status Registered

Select
Registered
Not Registered
Disabled

New phone M: 041

To update the registration to another number from AP, select the new number from the 'New Phone Number' drop-down box and click 'Update'.

UPDATE

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.

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Notifications

Notification

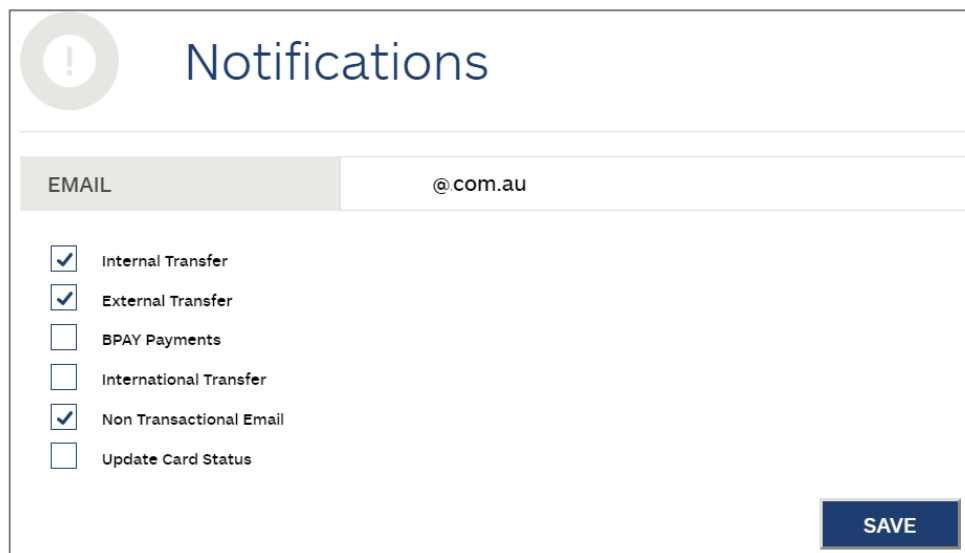


Notification section allows us to view, register, update and de-register the customer's notifications in the Admin Console.

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.

A screenshot of the "Notifications" configuration page. At the top left is a grey circle with a white exclamation mark. To its right is the title "Notifications" in blue. Below this is a horizontal bar with "EMAIL" on the left and "@com.au" on the right. Underneath is a list of notification types with checkboxes: "Internal Transfer" (checked), "External Transfer" (checked), "BPAY Payments" (unchecked), "International Transfer" (unchecked), "Non Transactional Email" (checked), and "Update Card Status" (unchecked). A blue "SAVE" button is located at the bottom right of the form.

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.

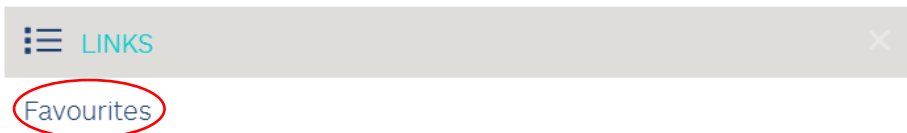
The saved favourite payees you can see in Admin Console matches with the list the customer can see in Online Banking.

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.

