



T24 Quick Reference Guide

Getting to Know T24

This guide has quick reference topics to help you use T24 to perform basic tasks. Keep it handy as you get to know T24.



T24 Helpline

If you need help as you get to know T24, call the T24 Helpdesk (x8555) or send an email to helpdesk@bankname.com.


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Getting Help



When you're working in T24, if you're not sure what to enter in a screen or field, click the T24 Help icon.

OR

1. In Internet Explorer, click the Favorites button  or press Alt-C.
2. Click the **My T24 Help** folder.
3. In the **Quick Reference** folder, click the link for the topic to view.

To add a displayed help topic to My T24 Help (your virtual binder)

1. Press Ctrl-D.
The Internet Explorer Add a Favorite window opens.
2. From the **Create in** drop-down list, select **My T24 Help**.
3. Click Add.

Signing In and Changing Your Password

Navigation: Opening T24

On the Windows Start Menu, click Corporate Applications > T24.

Overview

When you open T24, the first thing you need to do is sign in. Once you've signed in, the menu items you see and can open will depend on the permissions assigned to your role. In some cases you might see menu items that you do not have permission to open.

You have five tries to sign in. If for some reason you cannot sign in, please call the Helpdesk (x8555).

To sign in

1. In the T24 Sign In window, specify these values:

Username	Your new T24 username. The username is case-sensitive.
Password	The first time you sign in, type a password. Think of an alphanumeric password of 8 to 16 characters. The password is case-sensitive, and must contain at least one letter and one number. The next time you sign in, type the same password. If you forget your password, call the Helpdesk (x8555).

2. Press Enter or click **Sign In**.
3. If you are signing in for the first time, retype the password twice in the dialog box that opens.

You will be automatically signed off after 30 minutes of inactivity. If this happens, you must sign in again.


To sign off

- In the T24 main window, click **Sign Off**.

To change your password

1. In the T24 main window, click **Tools**.
2. Click **My Profile**, and then click **Change Password**.
3. Specify these values:

Old Password	Old password.
New Password	Alphanumeric password of 8 to 16 characters. The password is case-sensitive.
Confirm New Password	Repeat the new password.

4. Press Enter or click the check mark .
5. Close the windows.

Looking Up Customers

Navigation

In the Retail Menu, click Customer Operations > Enquiries > Customer Details.

Overview

T24 offers many ways to search for and display information. This topic shows you three common ways to look up customer information using the Find Customer enquiry.

To look up a customer's number



1. In the Find Customer screen, enter one of these search criteria:

Search criteria	Qualifier to select	What to search by	Notes
Name	equals	Type the customer's first and last name, enclosed in quotes. For example, "T24 MULTIFUNCTIONAL"	The name is case-sensitive. Quotes are required when there are spaces in the search term.
Name	contains	Type the customer's first and last name.	The name is case-sensitive. This search usually yields multiple results.
Date of Birth	equals	Type the customer's date of birth or date of incorporation, in the format <i>yyyymmdd</i> .	If desired, click the Calendar button and select the date.
Street	equals	Type the customer's street address, enclosed in quotes. For example, "15117 - 101 Ave"	Quotes are required when there are spaces in the search term.


2. Click **Find**.

The customer's number is displayed in the **Customer** column. You might need to scroll through the list if there are a lot of search results.

To view details for a customer

1. In the Find Customer screen, in the **Customer Number** field, type the 6-digit customer number, and then click **Find**.
2. Click Customer Details .
3. Scroll to the far right, in the drop-down list select **View Record**, and then click Select .
4. Click the **Customer Relationships** or **Customer Accounts** tabs to view more information.

To display the overview for a customer

1. In the Find Customer screen, in the **Customer Number** field, type the 6-digit customer number, and then click **Find**.
2. Click Customer Overview .


Using the CRM

This page gives you an overview of the Customer Relationship Management (CRM) features in T24 that you will use most often as you record, view, edit, and resolve customer contacts. Contacts include both interactions and opportunities.

Navigation

You open all the screens for the CRM from the Customer Overview. To view your Active Worklist, it doesn't matter which customer's overview is displayed in the Customer Overview.

To display the Customer Overview for a customer

1. In the Retail Menu, click Customer Operations > Enquiries > Customer Details.
2. In the Find Customer screen, in the **Customer Number** field, type the 6-digit customer number, and then click **Find**.
3. Click Customer Overview .


Recording Customer Contacts

To record the details of a customer contact

1. In the **Relationships** section of the Customer Overview screen, click **Input Contact**.
2. Follow the instructions in the [New Contact](#) help topic.

Using the Contact History

To view and edit a customer's contacts via the Contact History

1. In the **Relationships** section of the Customer Overview screen, click **View Contact History**.
The interactions and opportunities for the customer are displayed.
2. Scroll through the lists to find the contact record to view, and then click Contact Details .
3. Follow the instructions in the [View and Edit Contacts via Contact History](#) help topic.

Using My Active Worklist















To view and edit contacts assigned to you or created by you

1. In the **Relationships** section of the Customer Overview screen, click **My Active Worklist**.
The interactions and opportunities assigned to you are displayed.
2. Follow the instructions in the [My Active Worklist](#) help topic.

T24 Icons and Keyboard Shortcuts

T24 Icons

T24 contains dozens of icons. When you hover the mouse on an icon, the icon description is displayed.

Click this icon	With this description	To do this
	Account Maintenance	Display the maintenance options for an account.
	Account Transfer	Display the screen for closing an account and transferring the balance to another account.
	Amend	Edit a record.
	Authorize	Authorize a transaction.
	Calendar	Select a date from the calendar.
	Commit	Save a record and complete the record or transaction.
	Customer Details, Contact Details, View, View Details	Look up details about the line item.
	Frequency Control	Set up statement dates.
	New	Create a new record.
	Hold	Save the record or transaction as is, without finishing it. T24 saves the item for one year.
	Print Toolbox, Enquiry Actions	Select from a menu of printing or other tool options.
	Save	Save a record or transaction.
	Select	Select the specified drop-down menu item.
	Validate	Check your entries before saving and leaving a screen.

Keyboard Shortcuts

Tip: Using the Enter key in T24 is controversial. It sometimes causes unexpected results. However, at other times it is necessary or simply useful. You'll soon find out when it is effective to use Enter.


You can use many common Windows keyboard shortcuts in T24. Here are some examples.

Press this key combination	To do this
Ctrl-C	Copy the selected text.
Ctrl-V	Paste the copied text at the location of the cursor.
Ctrl-F	Search for a text string or number. First click the part of the screen where you want to search.
Ctrl-+	Increase the font size of the screen display.
Ctrl-- (Ctrl and minus sign)	Decrease the font size of the screen display.


Working in T24

Here are a few tips for working in T24.


Mandatory Fields

Some mandatory fields are indicated with an orange star . If you leave a mandatory field blank, you will receive an error message when you validate the screen.

Hot Fields

Hot fields are signified with a red box . After you make an entry in a hot field, T24 validates the entry and in some cases updates other fields and selection lists based on the value of the entry.

Specifying Dates

- Type dates in the numeric format *yyyymmdd*. For example, for August 31, 2012 type 20120831.
- All date fields also have a Calendar icon  beside the field. Click the icon to select the year, month, and day, in that order.
- In most cases, if you leave a date field blank, you will receive an error message when you validate the screen.

Viewing and Printing Reports


Overview

T24 comes with many different reports to help you do your job. Some of the reports are called enquiries. You can specify what information to display in the report and how to sort the information.

To view a report

1. Click the report name.
2. Specify criteria for the report.
3. To sort the report, click **More Options**, and then specify up to three fields by which to sort the information.
4. Click **Find**.

To print a displayed report

- Point to the Print Toolbox icon , and then select a print destination or file format.

To print a displayed report or record when the Print Toolbox is not available

- In the **More Actions** drop-down list, select **Local Print**.