

## Quick Reference Guide

# Startup Screen and Messages for New Webster Web-Link®

This guide will instruct users on how to change their startup (login) screen based on the options available and what to expect when Webster posts important messages related to our products and services.

The Startup Screen module is located under the Tools tab in the top navigation bar.



Depending on your entitlements, the top navigation bar may appear different, e.g. Home instead of Treasury Dashboard.

### How to Change your Startup Screen:

Changing the Startup Screen allows users to log in and view a specific page they select, instead of opening up to the standard Treasury Dashboard (or Home) screen.

#### Tools > Set > Startup Screen

1. After opening the Startup Screen page, choose from the options available in the drop down menu, users can do so by hovering over the item and clicking.
2. Once the user has clicked on the option, the dropdown will close automatically, hit submit.



#### Tip:

- Users must log out and back in for the new Startup Screen option to display

### Service Messages:

Messages, usually referred to as Banners in original Web-Link were often viewable upon login and were also found in a user's Inbox in the Messaging module.

With new Web-Link, there are two types of messages:

1. Critical, time sensitive messages will be displayed in a dedicated section right on the Treasury Dashboard when you login, or on three other screens, depending on topic of the message: Payment Center, Current Day Balances, or Prior Day Balances.

**Important Note:** If there are multiple messages, they will rotate once you leave a screen, and then return or refresh. If you want to save a particular message for future reference, simply print out the screen.

2. Similar to original Web-Link, correspondence messages between you and TPS Client Support will continue to be available from a secure Inbox, located in the upper right hand corner of your screen

## Startup Screen and Messages for New Webster Web-Link®

Here is an example of how message appears on the Treasury Dashboard Startup Screen and the Payment Center:

The screenshot shows the Webster Web-Link Treasury Dashboard. At the top, there's a navigation bar with 'Alerts 10', 'Approvals 0', and 'Messages 0'. Below that, a 'Change Layout' button is highlighted with a red arrow. The main message reads: 'ACH and Check PPY clients - Be sure to enroll in the Alerts relating to these services so exceptions are decided timely. Go to the Tools Tab, Manage, Alert Settings to enroll. For ACH PPY, select the Positive Pay ACH Exception Item Status alert, and select the status OPEN. For Check Positive Pay, select the Check Positive Pay Decision Status alert, and select the status OPEN.' Other dashboard elements include 'Account Balances', 'Balances Chart', 'Events', 'Shortcuts', and 'Statements'.

This is how the message appears on other screens, the Payment Center in this example.

The screenshot shows the Webster Web-Link Payment Center. At the top, it says 'Payment Center' and 'Use this page to select payment options or review existing payments.' A red arrow points to a message: 'Update regarding ACH Templates that were not migrated: you can either re-create them or, for templates with large numbers of recipients, you can contact our specialists for assistance to export them from original Web-Link and import them to new Web-Link.' Below the message is a 'Create a Payment' button.