

Welcome to SmartMicro eBanks



Quick Installation Guide

Introduction:

This installation guide is designed to help you with the basic tips needed to get you started with SmartMicro eBanks Solution installation.

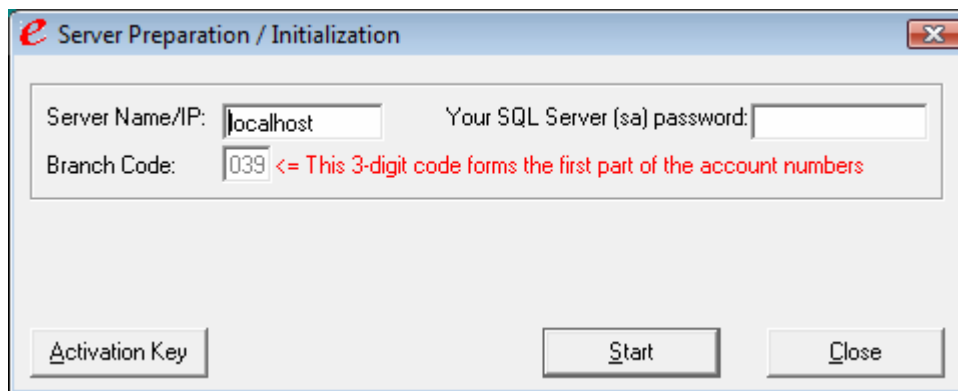
The required tools to install and use eBanks are:

- 1) A Server computer, installed with a working Microsoft SQL Server 2000
- 2) 'sa' password to the SQL Server 2000 installed
- 3) A recent download copy of **InstalleBanks.exe** i.e. eBanks installation file for each client
- 4) eBanks Server Preparation (PreServer) utility which is usually given to software vendors only. *If you do not have this utility please request your copy from SmartMicro Systems. Visit: <http://www.smartmicrosystemsng.com> for contact information.*
- 5) Internet Connection to Validate Activation Key from SmartMicro Systems website.

This installation guide will assume that you already have the above necessities.

Prepare your server for eBanks Database

Install and run the PreServer utility software from SmartMicro



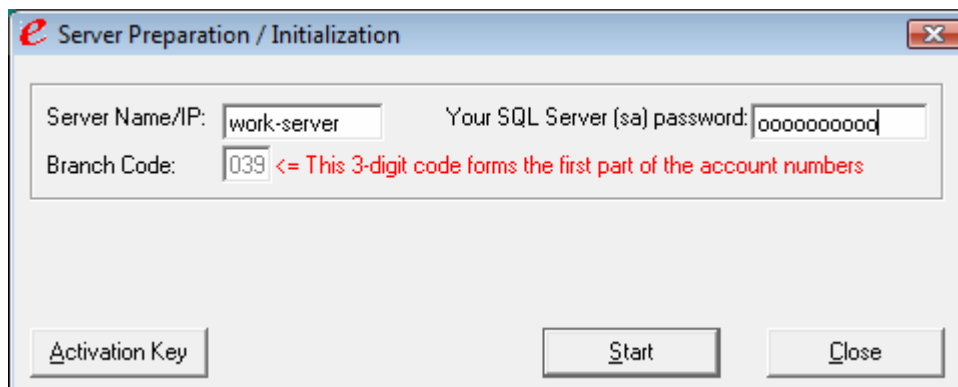
Server Preparation / Initialization

Server Name/IP: localhost Your SQL Server (sa) password:

Branch Code: 039 <= This 3-digit code forms the first part of the account numbers

Activation Key Start Close

By default, "localhost" is displayed as Server Name/IP. Please type the name of your SQL Server in this field and also enter your "sa" password on the next field. You may not need to change the Branch Code for now. Let us get your server running first.



Server Preparation / Initialization

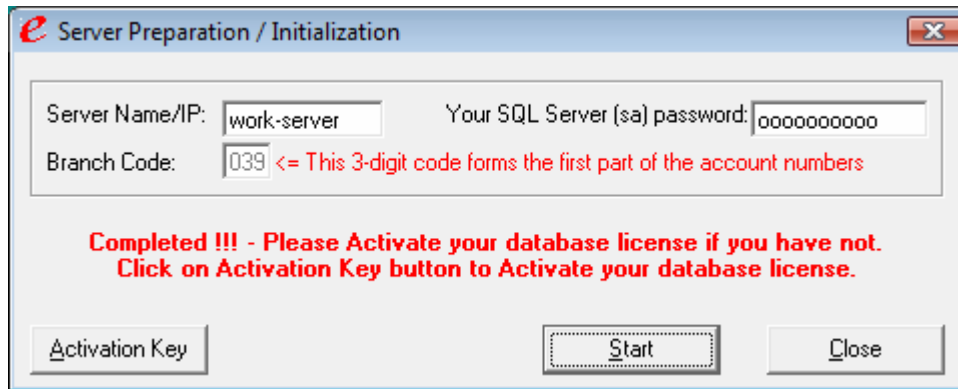
Server Name/IP: work-server Your SQL Server (sa) password: ooooooooo

Branch Code: 039 <= This 3-digit code forms the first part of the account numbers

Activation Key Start Close

As for my example, the name of my server is **work-server** and I have entered the "sa" password on the required field.

Click on the **Start** button to generate the database to the specified server. Once this is successfully done, you will get a notification as shown below.



The red colored message indicates that you have successfully installed your database on your SQL Server and you need to activate your database for use as a Trial mode or a Full license mode.

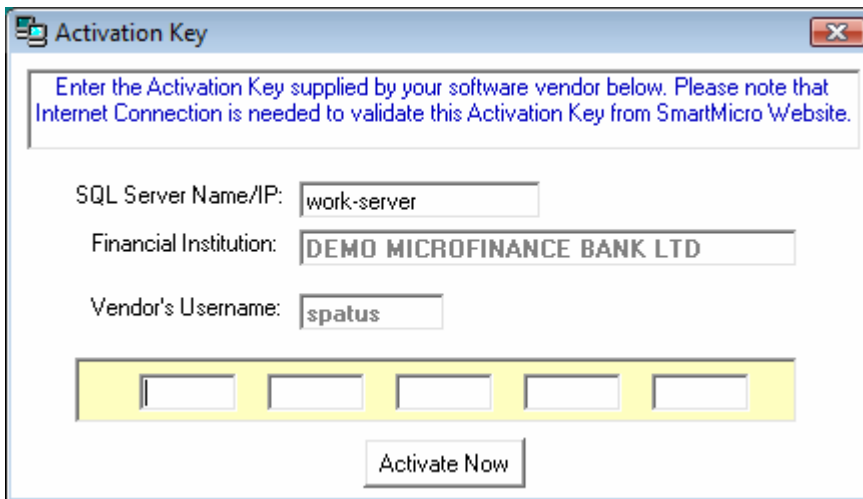
To activate your database license, click on Activation Key button.

Activate your database

Before you activate your database, you need to ensure that the computer on which **PrepServer** is running is connected to the Internet. PrepServer may not necessarily be installed on the server computer, but must be installed on a computer which is on the same LAN with the server computer and also have a windows authentication access to the server. It is very suitable when installed on a computer connected to the Internet and also on the same domain with the server computer.

If the above is difficult to achieve, you can install PrepServer on the server computer while you connect the server computer to the Internet temporarily to perform the online activation. You are advised to uninstall PrepServer from the server computer after a full implementation of eBanks.

Once the Internet connectivity requirement is met, click on the **Activation Key** button.



Activation Key

Enter the Activation Key supplied by your software vendor below. Please note that Internet Connection is needed to validate this Activation Key from SmartMicro Website.

SQL Server Name/IP:

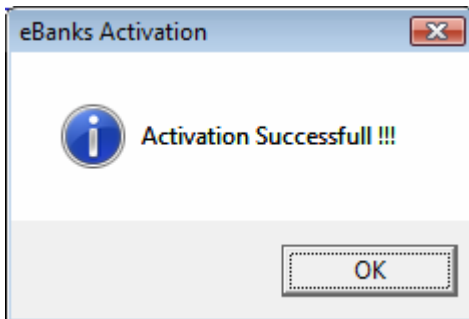
Financial Institution:

Vendor's Username:

Activate Now

Enter your Activation key supplied to you by your software vendor and click on Activate Now button.

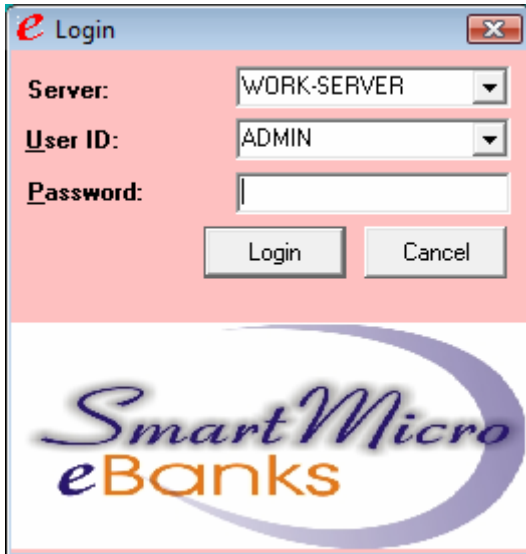
Once your key is validated and correct, you will get a message of validation success.



Next install eBanks software (**InstalleBanks.exe**) and connect to your database server.

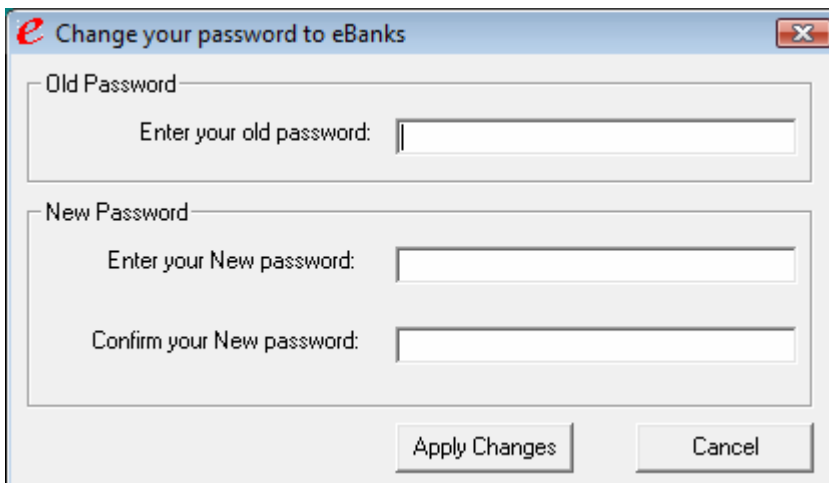
Login to eBanks

You will be required to log into eBanks for the first time with a username "ADMIN" and a blank password.



The screenshot shows a dialog box titled "Login" with a red header bar. It contains three input fields: "Server:" with a dropdown menu showing "WORK-SERVER", "User ID:" with a dropdown menu showing "ADMIN", and "Password:" with an empty text box. Below the fields are "Login" and "Cancel" buttons. At the bottom of the dialog is the "Smart Micro eBanks" logo.

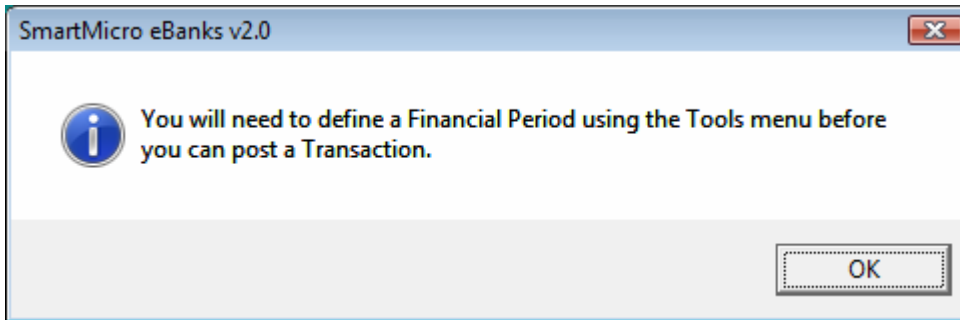
Remember to specify the database server name on the server field on the login form as shown above. Once you log in for the first time, you will get a message that your password has expired and that you are required to change your password.



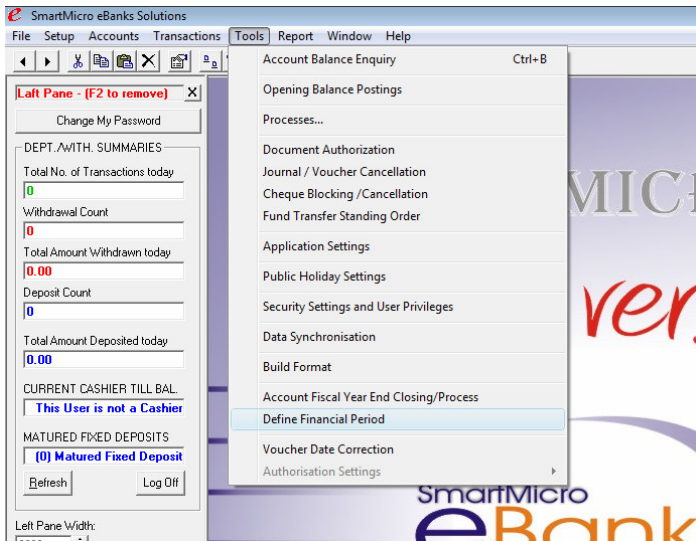
The screenshot shows a dialog box titled "Change your password to eBanks" with a red header bar. It contains three input fields: "Old Password" with a label "Enter your old password:" and an empty text box, "New Password" with a label "Enter your New password:" and an empty text box, and "Confirm your New password:" with an empty text box. Below the fields are "Apply Changes" and "Cancel" buttons.

Here you have the opportunity to specify a suitable password for the admin. However you can change this password at a later time in the system.

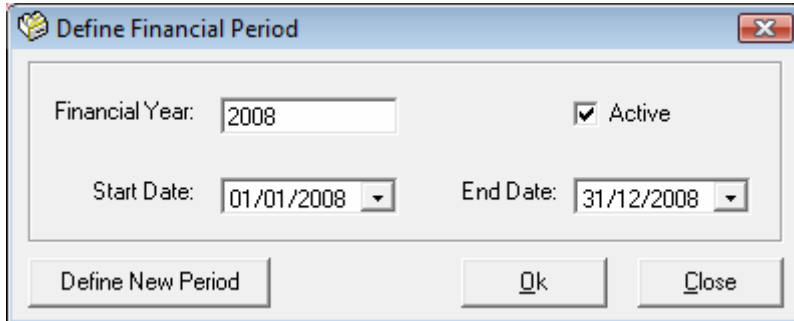
Once you apply your new password. You will get another message that you need to define a new financial period for your banking application to work.



Click on the tool menu and click on Define Financial Period



To define a new financial period, Click on **Define New Period** button and then click on **Ok** button to define the period as shown on the Start and the End Date



Define Financial Period

Financial Year: 2008 Active

Start Date: 01/01/2008 End Date: 31/12/2008

Define New Period Ok Close

You may now Exit eBanks

Please refer to eBanks user's guide on how to open accounts and setup tellers account and post balance brought forwards (B/F...)

Please note that eBanks comes with a standard chart of account suitable for Microfinance banks and tallies with the recommended for CBN returns reporting. However, users of eBanks require going through a detailed training or user education for at least two classes to have a detailed knowledge on how to use eBanks.