



logicpath

C3 Financial

Managing the Institution

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Managing the Institution

The Institution, by default, will be created by a logicpath consultant during implementation.

Accessing the Institution Management Screen

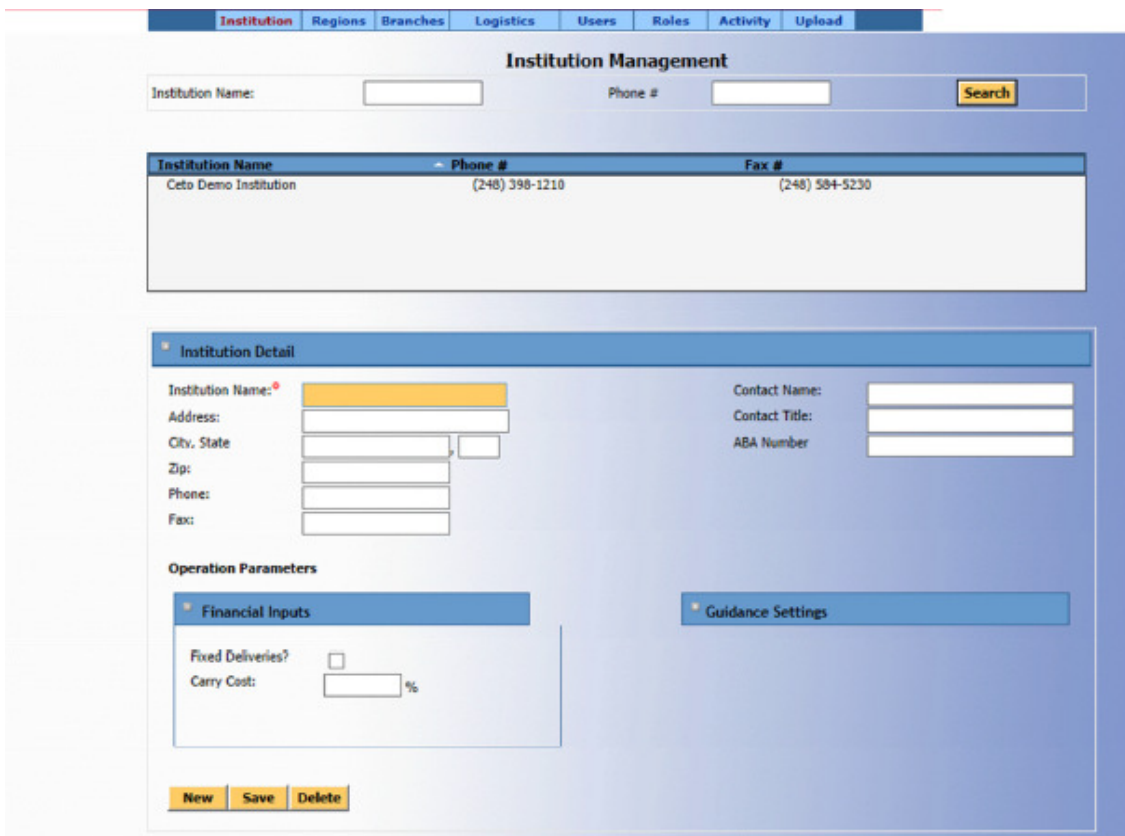
At the top of the Branch Dashboard, click the Institution tab on the far left of the Administration menu bar, select the Institution's name in the Institution listing at the top of the page.



From this screen you will be able to add, update and adjust your institution's settings.

Adding Institutions

Click the "New" button at the bottom of the screen to add a new institution.



Basic Institution Information:

Required fields are labeled with a red asterisk. The information required to create a new institution is Institution Name. However, please fill out as many details about the institution is possible



Operation Parameters

Financial Inputs

Financial Inputs are used for calculating the Cost Benefit associated with using the C3 Financial, as well as optimum shipment cycles for each branch. These numbers should be reviewed every six months.

Delivery Cost

The Delivery Cost is the cost your institution spends to ship cash to the branch. This may be entered at the institution, region or branch level, depending on your carrier contract.

★ Always click Save after completing an action!

Carry Cost

The Carry Cost is the cost of keeping excess cash in the branch. Usually this cost is the interest rate at which your institution could invest this money.

Editing Institutions

After editing the appropriate fields are updated click the "Save" button at the bottom of the page.

Deleting Institutions

Do not delete an Institution under any circumstances, as all information associated with that Institution will be deleted, i.e. Regions, Branches, ATMs, Tellers.

