

How to Launch the Banno Plugins

Follow these four steps to go live with the plugins and offer integrated invoicing and online payment acceptance to your customers.



STEP 1

Build Your Project Plan

Before you get started, we know you need to gather all the information so you — and key leaders at your financial institution — understand the project.

The first step is to book a roadmapping session. At this kickoff meeting, the team will walk you through the technology, show you the benefits, and build your timeline with check-ins for the following steps.



STEP 2

Configure & Test

Next up on your roadmap will be to configure and start testing the plugins. Good news! Jack Henry Digital already embedded the technology as a core feature in Banno.

What does that mean?

Your implementation is automated, so enabling the plugins is simple for your financial institution. Together, we'll follow the instructions on the Testing Guide.



STEP 3

Train Your Team

To ensure your financial institution is prepared to help service and support the growing needs of small businesses and non-profits, we offer pre-built training resources: webinars, reference materials, go-to-market collateral, and more.

We offer live training for your team. If you prefer to train your team internally, we'll provide the resources for your organization to use.



STEP 4

Launch

It's time to launch, and we'll be there to walk you through enabling the plugins globally to your customers.

What's next?

After you're live, marketing to your small business customers is key to driving feature awareness, engagement, and activation. That's why we created proven marketing collateral for your use: marketing emails, ads, videos, and more.

Learn best practices and how your financial institution can easily use the library of free assets.