

Onboarding Integration

This document describes how to integrate NewBanking's Onboarding Wizard. The Onboarding Wizard is a UI widget responsible for customer (end-user) onboarding and it has been designed to be easy to integrate into existing clients' websites. Note that a client here refers to a customer of NewBanking, while a customer refers to a customer of such a client.

This document assumes that a grant process has been defined and setup for the client.

The Onboarding Wizard URL

The Onboarding Wizard is available at a certain URL, like this one:

<https://www.newbanking.com/onboarding-wizard/?grantProcessId=94110486-c37d-4452-92c4-a2dc49c42214&languageCode=en-US>

It accepts the following parameters:

- languageCode which specifies the default language,
- grantProcessId which is a UUID specifying the grant process to use, and
- grantRequestId which is a UUID specifying the grant request sent to a recipient
- customerId

The languageCode is optional, and only one of grantProcessId or grantRequestId can be specified at a time.

The grantProcessId (and languageCode, optionally) is used when a customer navigates the client website to reach the Onboarding Wizard. Typically, the Onboarding Wizard is integrated into a "Become a Customer" landing page of the client's website. The grantProcessId is "static" and linked to a certain grant process. Thus, it never changes. The grantProcessId is provided by NewBanking once the grant process has been set up.

The grantRequestId is used whenever a grant request is sent to a potential customer. Typically, such grant request is sent as an email via the NewBanking Back-Office, said email containing a deep link to the page containing the Onboarding Wizard, e.g. the "Become a Customer" landing page of the client's website. The deep link will contain the grantRequestId value, which must be carried onwards to the Onboarding Wizard URL. The grantRequestId is unique to a specific grant request. The grant request specifies the grantProcessId, languageCode, recipient name, personal message, etc. Note that the Onboarding Wizard URL should not contain a languageCode when the grantRequestId is used.

How to integrate

The easiest way to integrate the NewBanking Onboarding Wizard is through our JavaScript Loader, just follow this guide. Alternatively it is also possible to integrate our solution directly as an iFrame - please contact us if you would like the documentation for that.

1. Paste in the Onboarding Wizard Loader JS after the <head> tag of your webpage which includes a method call with the relevant parameters for your customized Onboarding Wizard. Required fields are either 'grantProcessId' or 'grantRequestId'. Optional fields are 'languageCode' and 'customerId', if no 'languageCode' is provided the Wizard will default to US English. You may change the name of 'nbloader' in the script parameter, just make sure that it matches the name of the method call.

Loader JS

```
<!--NewBanking Onboarding Wizard Loader JS-->
<script>
(function(i,s,o,g,r,a,m){i['NewBanking']=r;i[r]=i[r]||function(){
  (i[r].q=i[r].q||[]).push(arguments)},i[r].l=1*new
Date();a=s.createElement(o),
m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.
insertBefore(a,m)})(window, document, 'script',
'https://www.newbanking.com/onboarding-wizard/static/loader/v1.js',
'nbloader');
nbloader('create', 'nbwizard', {'grantProcessId':
'c2ccbaef-6952-44be-a0d9-fd3fa866bdc4', 'languageCode': 'en-US',
'customerId': 'f20bffd5-abf8-448e-9249-92216d526bd9'});
</script>
```

2. Add the <div> tag in the desired location in the body of your HTML. This is the <div> tag the Onboarding Wizard Iframe will be inserted into:

```
Loader Div  
  
<div id="nb-onboarding-wizard-container" ></div>
```

3. You may optionally add your own custom CSS targeting the "nb-onboarding-wizard-container" <div>.

4. When the page is loaded you should see your Onboarding Wizard.

5. You may add query string parameters to the end of your URL which will override the parameters set in the method. Which will look like:

```
?grantRequestId=ce84b175-588f-4e22-9424-4dcbb0d8a396&languageCode=da-DK
```

6. Verify that you see the Onboarding Wizard on your website.

Customized styling of the Onboarding Wizard

NewBanking's Onboarding Wizard can be styled as follows:

- With a primary color (of mainly the header and buttons). Note that strong colors are preferable, e.g. blue, black, or green.
- With a company logo and name (in the header) in a transparent PNG image that is shown at 50 pixels in height and maximum 250 pixels in width. We recommend the image to be twice the size to ensure the quality (e.g. 100 pixels in height and 500 pixels in width).

The size of the Onboarding Wizard is fixed to 460 x 620 pixels (width x height) to simplify the design of the context website.

These customizations are done within NewBankings systems, so please contact us for updating of these values.