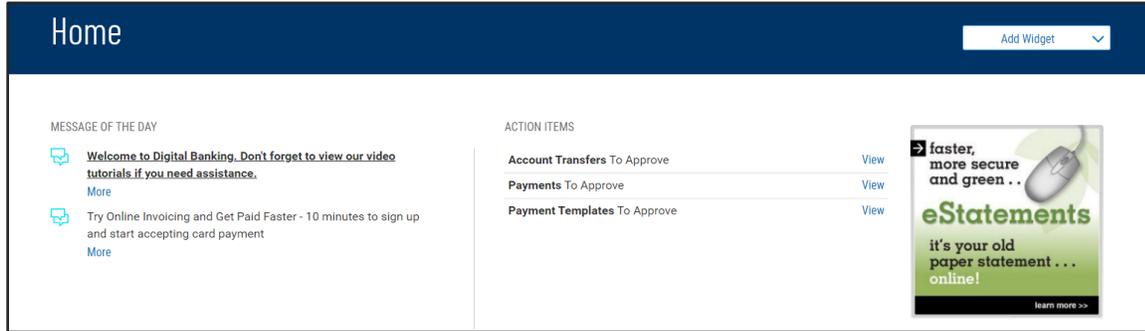


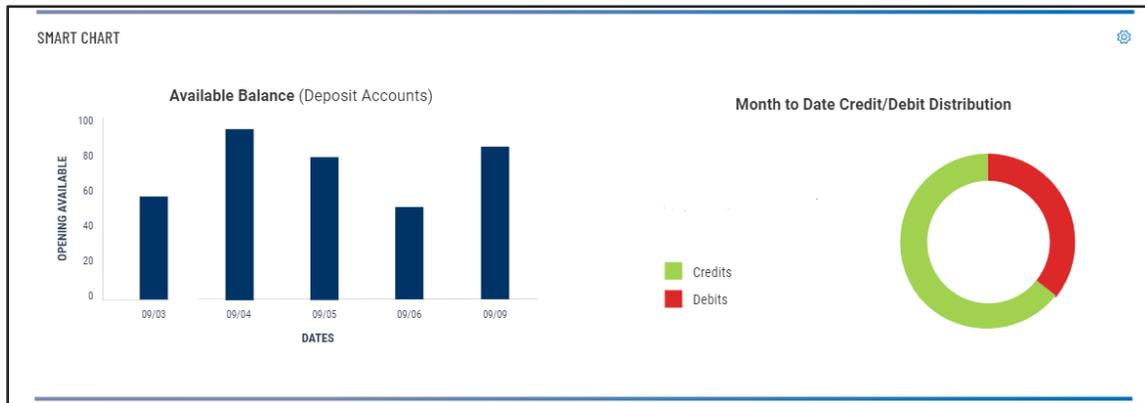
# Quick Reference Guide – Home (Dashboard)

Home page, also known as the Dashboard, is your landing page and prime real estate upon login. As a default, there are certain widgets pre-selected for your convenience and benefits. You may keep them on the Home page, remove them or add others via the Add Widget dropdown on the top header bar.

Pinned to the Home page is the Notification widget. It delivers important communication from your financial institution to you and highlights actions requiring your focus. This is not removable nor resizable.



When you have permissions to view any bank deposit accounts – such as checking and savings accounts, a Smart Chart widget is pre-selected for you. It offers a quick visual of key data regarding your deposit account information.



When you have permissions to view any bank accounts, a checking or savings account or a loan account, you will also have the Financial Overview widget on the Home page. There are two formats: (1) a tabular, list view or (2) a tile view. If you have 20 or fewer accounts, the Financial Overview defaults to the tile view. You have the option to toggle to list view using the icon that appears in the upper right corner of the widget.



## Quick Reference Guide – Home (Dashboard)

**Tile view** presents accounts by type then in alphabetical order of Account Names and displays Current Available balance of each account. Clicking on each Account Name will take you to the appropriate Account Details screen.

Deposit Accounts

<b>MY CHECKING TEST</b> <small>ACCOUNT NUMBER</small> 123123123 <small>CURRENT AVAILABLE</small> \$3,738.37	<b>NICKNAME SAVINGS</b> <small>ACCOUNT NUMBER</small> 888888 <small>CURRENT AVAILABLE</small> \$9,185.98	<b>PREMIER CHECKING</b> <small>ACCOUNT NUMBER</small> 5552572687 <small>CURRENT AVAILABLE</small> \$3,957.51	<b>SAVING 1234</b> <small>ACCOUNT NUMBER</small> 8758888 <small>CURRENT AVAILABLE</small> \$2,742.22
<b>TEST ACCOUNT 1</b> <small>ACCOUNT NUMBER</small> 10010001 <small>CURRENT AVAILABLE</small> \$3,787.86	<b>TEST ACCOUNT 2</b> <small>ACCOUNT NUMBER</small> 10010002 <small>CURRENT AVAILABLE</small> \$1,540.95	<b>TEST ACCOUNT 3</b> <small>ACCOUNT NUMBER</small> 10010003 <small>CURRENT AVAILABLE</small> \$5,885.76	

Loan Accounts

**List view** presents 25 accounts per page by type, in alphabetical order of Account Names and displays Today's Opening Ledger and Current Available balances for each account.

Deposit Accounts

As of 03/12/2021 06:48 PM

ACCOUNT NAME	ACCOUNT NUMBER	TODAY'S OPENING LEDGER	CURRENT AVAILABLE
My checking test	123123123	123,123.12	3,738.37
Nickname Savings	888888	8,888.88	9,185.98
Premier Checking	5552572687	555,257.26	3,957.51
Saving 1234	8758888	87,588.88	2,742.22
Test Account 1	10010001	100,100.01	3,787.86
Test Account 2	10010002	100,100.02	1,540.95
Test Account 3	10010003	100,100.03	5,885.76

VIEW 1-7 OF 7

Loan Accounts

## Quick Reference Guide – Home (Dashboard)

You can also access the Transaction Search widget on the Home page. It offers you the ability to quickly zoom in on transactions meeting certain criteria.

TRANSACTION SEARCH

Search Deposit Accounts

ACCOUNTS DATE

Select  

TRANSACTION TYPE Optional AMOUNT Range Optional

Select

[Hide Additional Filters](#)

When you have permissions to transfer money between accounts (also known as book transfer), a Quick Transfer widget is offered on your Home page. It offers you the ability to easily send a simple transfer.

QUICK TRANSFER 

FROM ACCOUNT TO ACCOUNT

Select

TRANSFER DATE AMOUNT

08/02/2019 

MEMO Optional

# Quick Reference Guide – Home (Dashboard)

Here is an example of the Home page with default widgets –

Home
Add Widget

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**MESSAGE OF THE DAY**

[Welcome to Digital Banking. Don't forget to view our video tutorials if you need assistance.](#)  
[More](#)

Try Online Invoicing and Get Paid Faster - 10 minutes to sign up and start accepting card payment  
[More](#)

**ACTION ITEMS**

[Account Transfers To Approve](#) View

[Payment Templates To Approve](#) View

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**SMART CHART**
⚙️

**Available Balance (Deposit Accounts)**

**Month to Date Credit/Debit Distribution**

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**FINANCIAL OVERVIEW**
⚙️

☰

— Deposit Accounts 🔄 As of 12/31/2021 12:47 PM

ACCOUNT NAME	ACCOUNT NUMBER	TODAY'S OPENING LEDGER	CURRENT AVAILABLE
Capital Account	****0003	-	17.22
Disbursement Account	****0007	-	3,834.45
Payroll Account	****0002	-	7,122.52
test	****0001	-	3,733.95

VIEW 1-4 OF 4 1

+ Loan Accounts
+ Investment Accounts
+ Other Accounts

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**TRANSACTION SEARCH** ⚙️

Search Deposit Accounts

ACCOUNTS  ▼

DATE  📅

Show Additional Filters

SUBMIT
Cancel

**QUICK TRANSFER** ⚙️

FROM ACCOUNT  ▼

TO ACCOUNT  ▼

TRANSFER DATE  📅

AMOUNT  \$

MEMO  Optional

0/80

SUBMIT
CLEAR