

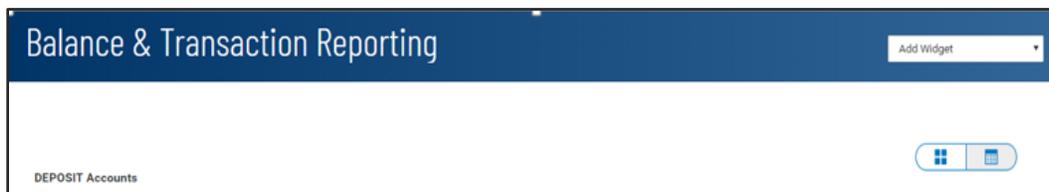
## Quick Reference Guide – Home (Dashboard)

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.

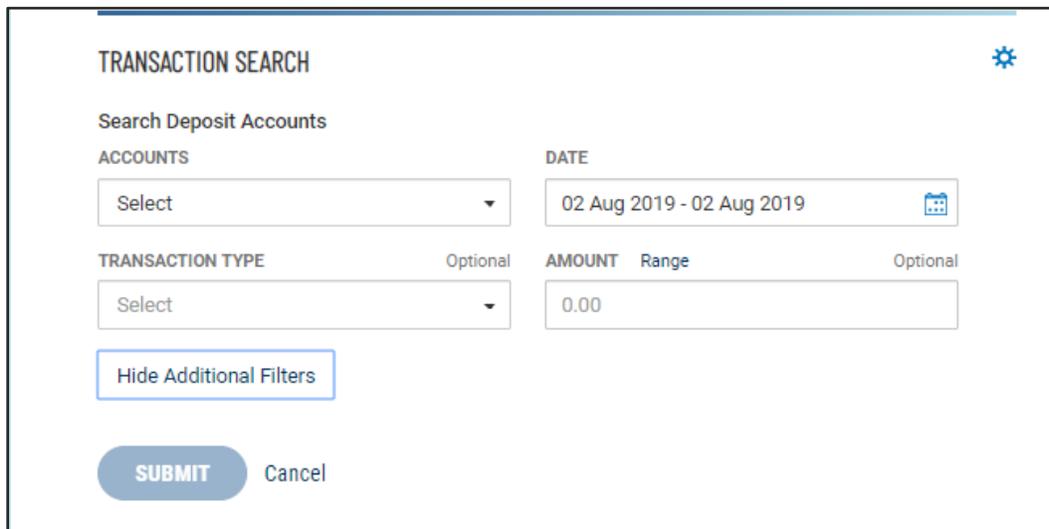
Pinned to the Home page is the Notification widget. It delivers important communication from your financial institution to you. This is not removable nor resizable.



When you have permissions to view any bank accounts, a checking or savings account or a loan account, you will have Account Summary 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 Account Summary 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.



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.

The screenshot shows the "TRANSACTION SEARCH" widget. It has a title "TRANSACTION SEARCH" at the top left and a gear icon for settings at the top right. Below the title, it says "Search Deposit Accounts". There are two main sections: "ACCOUNTS" and "DATE". The "ACCOUNTS" section has a dropdown menu with "Select" and a downward arrow. The "DATE" section has a text input field with "02 Aug 2019 - 02 Aug 2019" and a calendar icon. Below these, there are "TRANSACTION TYPE" and "AMOUNT" sections. "TRANSACTION TYPE" has a dropdown menu with "Select" and a downward arrow, and is labeled "Optional". "AMOUNT" has a text input field with "0.00" and is labeled "Optional" and "Range". At the bottom left, there is a "Hide Additional Filters" button. At the bottom, there are "SUBMIT" and "Cancel" buttons.

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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

<b>FROM ACCOUNT</b>	<b>TO ACCOUNT</b>
<input type="text" value="Select"/>	<input type="text" value="Select"/>
<b>TRANSFER DATE</b>	<b>AMOUNT</b>
<input type="text" value="08/02/2019"/> 	<input type="text" value="0.00"/>
<b>MEMO</b>	Optional
<input type="text"/>	

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

## Home

Add Widget

**Message of Day.** Welcome to the Commercial Banking Webinar! [More](#)

New Bulletins to read. [View](#)

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### ACCOUNT SUMMARY

DEPOSIT ACCOUNTS

TODAY'S OPENING LEDGER: \$1,955,686.05  
CURRENT AVAILABLE: \$10,733.56

As of 08/01/2019 08:17 PM

SAVED VIEWS: Select view

Account Name	Account Number	Today's Opening Ledger	Current Available
Premier 5%	123123123	651,895.35	1,849.27
Building Account	23235252	651,895.35	3,376.60
Capital Account	123456789	651,895.35	5,507.69

Viewing 1-3 of 3 records

DISPLAY: 10 per page | PAGE: 1 of 1

LOAN ACCOUNTS

CURRENT PRINCIPAL: \$1,748.23  
CURRENT AVAILABLE: \$5,784.63

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### TRANSACTION SEARCH

Search Deposit Accounts

ACCOUNTS: Select | DATE: 01 Aug 2019 - 01 Aug 2019

Show Additional Filters

**SUBMIT** Cancel

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### QUICK TRANSFER

FROM ACCOUNT: Select | TO ACCOUNT: Select

TRANSFER DATE: 08/01/2019 | AMOUNT: 0.00

MEMO:  Optional

**SUBMIT** Clear