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.

Home		Add Widget 🔻
0	Message of Day. Welcome to the Commercial Banking Webinar!	More
•	New Bulletins to read.	View

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.

Balance & Transaction Reporting	Add Widget 🔹
DEPOSIT Accounts	

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.

Search Deposit Accounts				
ACCOUNTS		DATE		
Select	•	02 Aug	2019 - 02 Aug 2019	
TRANSACTION TYPE	Optional	AMOUNT	Range	Optional
Select	-	0.00		
SUBMIT Cancel				

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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.

FROM ACCOUNT	TO ACCOUNT
Select	Select -
TRANSFER DATE	AMOUNT
08/02/2019	0.00
MEMO	Option

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

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