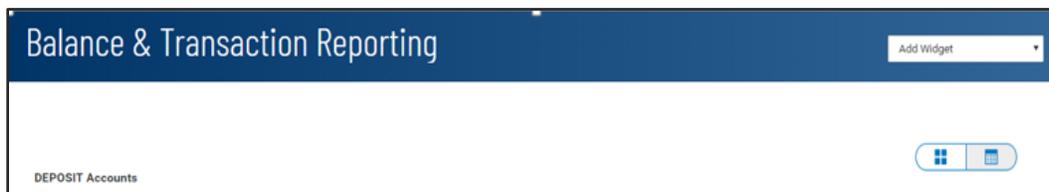# Quick Reference Guide – Home (Dashboard)

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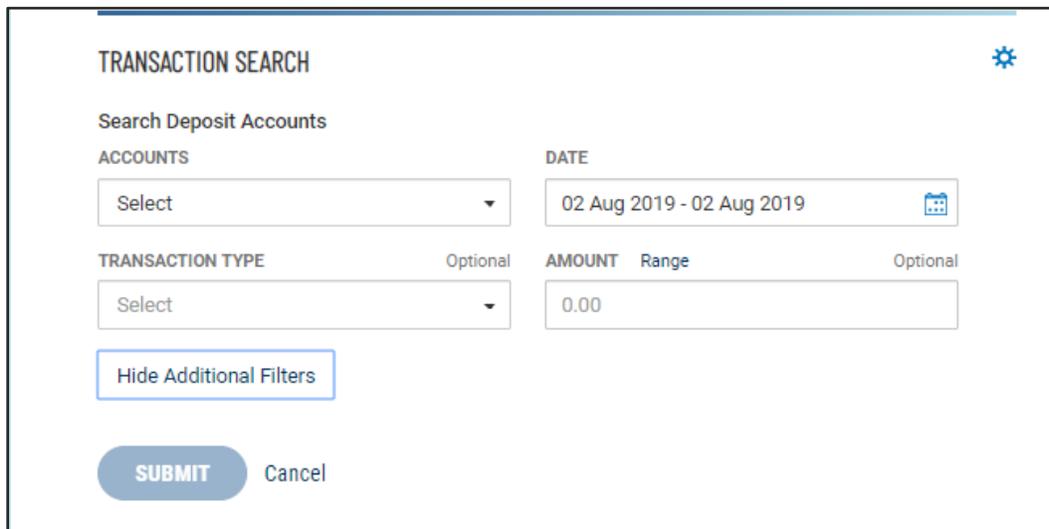
Pinned to the Home page is the Notification widget. It delivers important communication from your financial institution to you. This is not removable nor resizable.

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.

Quick Reference Guide – Home (Dashboard)

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   ▾   Select   ▾

TRANSFER DATE   **AMOUNT**

08/02/2019   📅   0.00

MEMO   Optional

[   ]

SUBMIT   Clear

Quick Reference Guide – Home (Dashboard)

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