

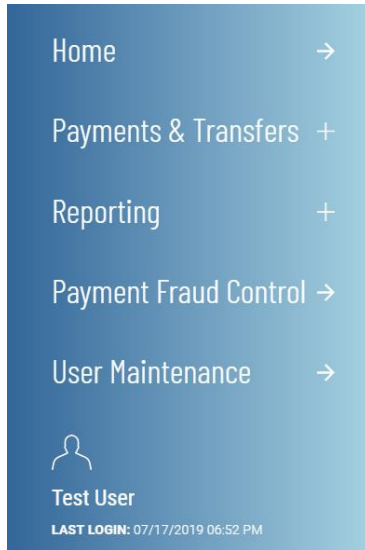
# Quick Reference Guide – Basic Navigation

## Main menu

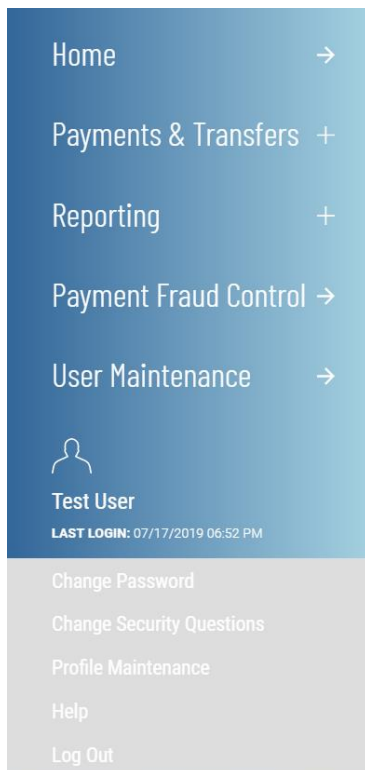
Click on the 4-line icon on upper left corner, just below your financial institution's logo to expand the side menu:



+ indicates there are more menu selections available



Click on your User Name to expand the user account related additional menu, including Log Out:



# Quick Reference Guide – Basic Navigation

## Home page (as an example)

Also known as the Dashboard, your landing page is a Workspace. Each workspace presents various information in sections known as Widgets. On the Home workspace you will find a Notification widget accompanied by a collection of other widgets based on the functionality you have been entitled to (for example viewing account balances or initiating account transfers).

The screenshot displays the 'Home' workspace dashboard. At the top, there is a blue header with the word 'Home' and an 'Add Widget' button. Below the header, a 'Message of Day' widget displays a welcome message and a 'View' link. A 'New Bulletins to read' section also has a 'View' link. The main content area is divided into several sections:

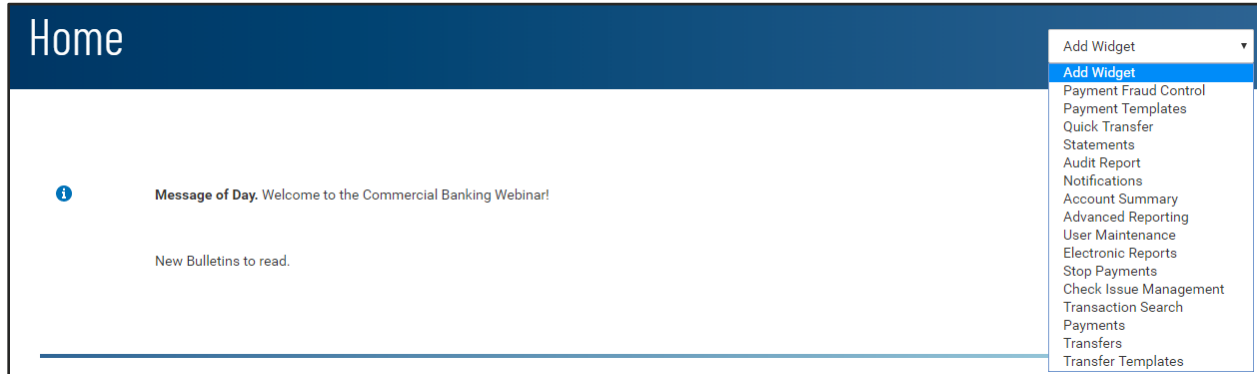
- ACCOUNT SUMMARY:** Features a toggle for 'TODAY'S OPENING LEDGER' and 'CURRENT AVAILABLE'. The opening ledger is \$1,955,686.05 and current available is \$10,733.56. Below this is a table of deposit accounts.
- DEPOSIT ACCOUNTS:** A table with columns for Account Name, Account Number, Today's Opening Ledger, and Current Available. It lists three accounts: Premier 5%, Building Account, and Capital Account.
- TRANSACTION SEARCH:** A search form for deposit accounts with fields for ACCOUNTS, DATE (01 Aug 2019 - 01 Aug 2019), and a SUBMIT button.
- QUICK TRANSFER:** A form for initiating transfers with fields for FROM ACCOUNT, TO ACCOUNT, TRANSFER DATE (08/01/2019), and AMOUNT (0.00).

At the bottom of the dashboard, there is a 'LOAN ACCOUNTS' section showing 'CURRENT PRINCIPAL' (\$1,748.23) and 'CURRENT AVAILABLE' (\$5,784.63).

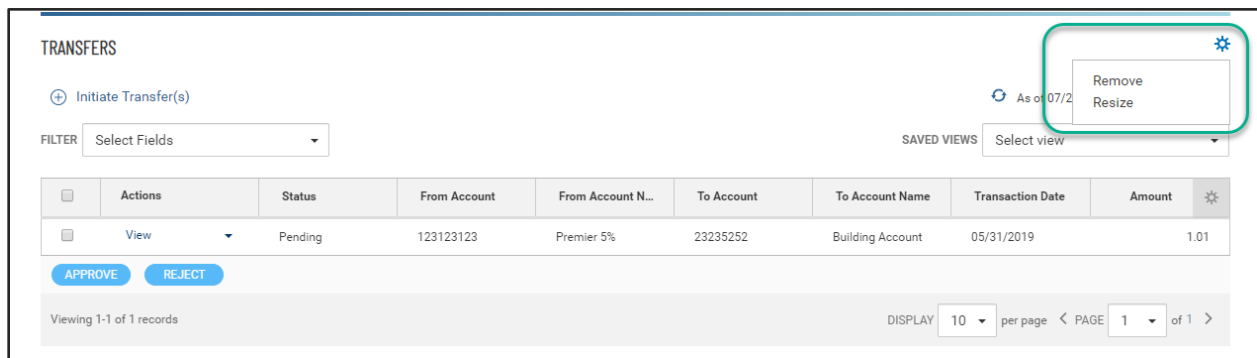
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## Workspace

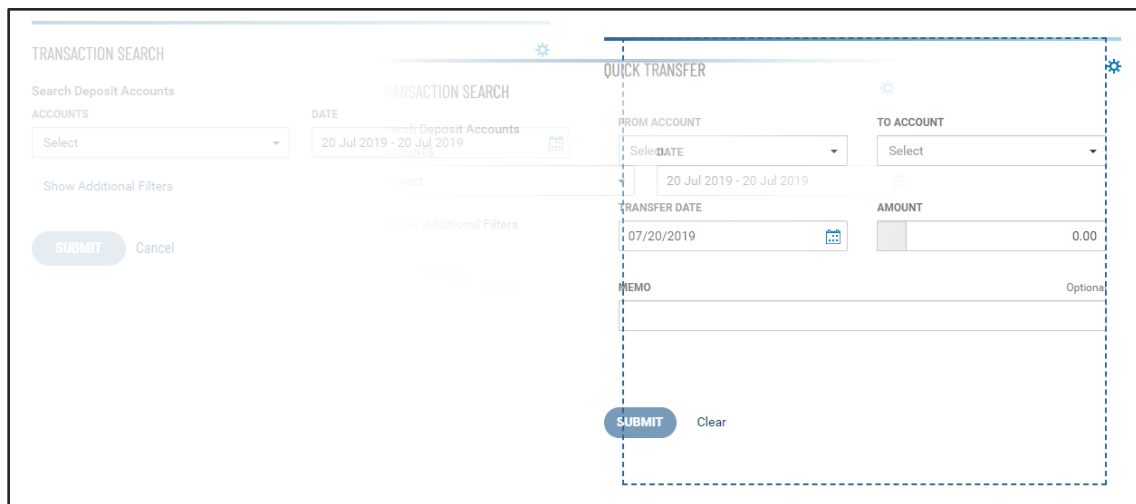
Each workspace is a page on which you will see the system default widgets relevant for that workspace (i.e. on the Transfers Workspace you would see a Transfers widget). Workspaces offer the ability for you to add, remove, resize, and arrange widgets to personalize the workspace to best meet your needs.



Any widgets on any workspace with a gear icon ⚙️ in the upper right corner means it can be repositioned (moved), resized or deleted (removed):



To move a widget, just click anywhere on the widget being moved, then drag and drop:





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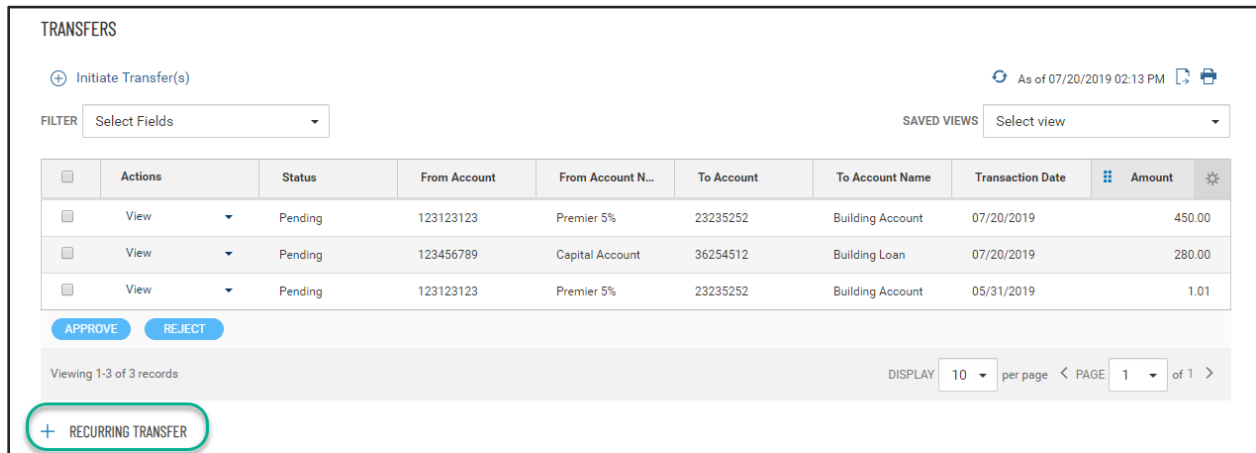
# Quick Reference Guide – Basic Navigation

## Widget




A widget is a single focused component that presents action(s) and information with common purpose in a List View, such as view account information, place a stop payment or make an account transfer.

While each widget focuses on different purpose, widgets have a set of standard capabilities:






1. Repositionable, resizable and removable as described previously under Workspace for widgets with an  icon.
2. Present sub-category of information in additional list views.  indicates there is more info to be expanded –




TRANSFERS

 Initiate Transfer(s) As of 07/20/2019 02:13 PM  

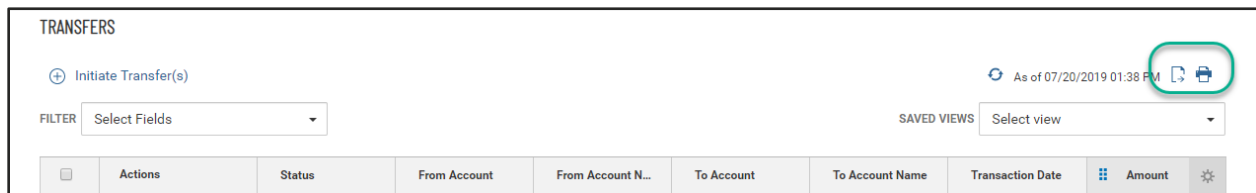
FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	 Amount 
<input type="checkbox"/>	View 	Pending	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00
<input type="checkbox"/>	View 	Pending	123456789	Capital Account	36254512	Building Loan	07/20/2019	280.00
<input type="checkbox"/>	View 	Pending	123123123	Premier 5%	23235252	Building Account	05/31/2019	1.01




Viewing 1-3 of 3 records DISPLAY  per page < PAGE  of 1 >

 RECURRING TRANSFER



3. Export the data or print –



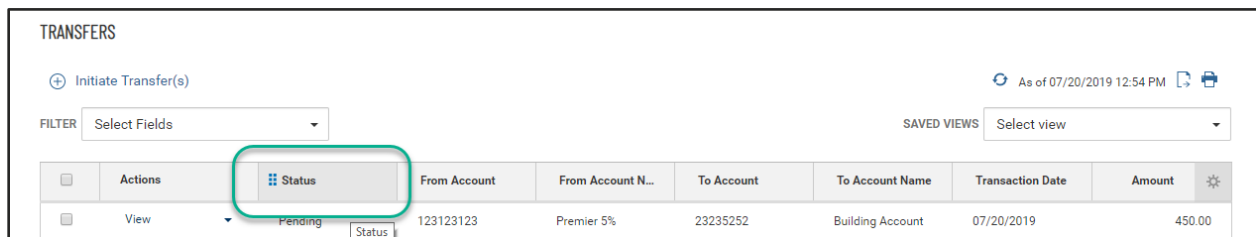
TRANSFERS

 Initiate Transfer(s) As of 07/20/2019 01:38 PM  




FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	 Amount 
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4. Sort data in a column –



TRANSFERS

 Initiate Transfer(s) As of 07/20/2019 12:54 PM  

FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	 Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	Amount 
<input type="checkbox"/>	View 	Pending 	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00

# Quick Reference Guide – Basic Navigation

## 5. Arrange order of column display –

TRANSFERS

Initiate Transfer(s) As of 07/20/2019 12:54 PM

FILTER Select Fields SAVED VIEWS Select view

	Actions	Status	From Ac	From Account ...	To Account	To Account Name	Transaction Date	Amount
	View	Pending	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00

## 6. Display desired data columns –

- Click on the gear icon inside the list view to expand all available data categories –

TRANSFERS

Initiate Transfer(s) As of 07/20/2019 01:22 PM

FILTER Select Fields SAVED VIEWS Select view

	Actions	Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	Amount

- Make your selection then click Update –

TRANSFERS

Initiate Transfer(s) As of 07/20/2019 12:54 PM

FILTER Select Fields SAVED VIEWS Select view

All columns

<input checked="" type="checkbox"/> Amount	<input type="checkbox"/> Bank Trace	<input type="checkbox"/> Customer Trace	<input checked="" type="checkbox"/> From Account	<input checked="" type="checkbox"/> From Account Name
<input type="checkbox"/> Initiated By	<input type="checkbox"/> Initiated Date/Time	<input type="checkbox"/> Memo	<input type="checkbox"/> Response	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> To Account	<input checked="" type="checkbox"/> To Account Name	<input checked="" type="checkbox"/> Transaction Date		

Update Cancel

## 7. Filter data to narrow in on specific transactions –

TRANSFERS

Initiate Transfer(s) As of 07/20/2019 01:38 PM

FILTER From Account  APPLY SAVED VIEWS Select view

	From Account	From Account N...	To Account	To Account Name	Transaction Date	Amount
	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00
	123456789	Capital Account	36254512	Building Loan	07/20/2019	280.00
	123123123	Premier 5%	23235252	Building Account	05/31/2019	1.01

Not Currently Displayed  
Customer Trace  
Initiated By  
Memo

DISPLAY 10 per page < PAGE 1 of 1 >

# Quick Reference Guide – Basic Navigation

## 8. Save your personalized view for reuse –

TRANSFERS

+ Initiate Transfer(s) As of 07/20/2019 01:48 PM

FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	Status	From Account	From Account N...	To Account	To Account Name	T
<input type="checkbox"/>	View	Pending	123123123	Premier 5%	23235252	Building Account	07

## 9. Take individual or bulk action –

- Individual action –

TRANSFERS

+ Initiate Transfer(s) As of 07/20/2019 01:48 PM

FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	Amount	
<input type="checkbox"/>	View	Pending	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00	
<input type="checkbox"/>	Approve	Pending	123456789	Capital Account	36254512	Building Loan	07/20/2019	280.00	
<input type="checkbox"/>	Reject	Pending	123123123	Premier 5%	23235252	Building Account	05/31/2019	1.01	

- Bulk action –

TRANSFERS

+ Initiate Transfer(s) As of 07/20/2019 01:48 PM

FILTER  SAVED VIEWS

<input type="checkbox"/>	Actions	Status	From Account	From Account N...	To Account	To Account Name	Transaction Date	Amount	
<input checked="" type="checkbox"/>	View	Pending	123123123	Premier 5%	23235252	Building Account	07/20/2019	450.00	
<input checked="" type="checkbox"/>	View	Pending	123456789	Capital Account	36254512	Building Loan	07/20/2019	280.00	
<input type="checkbox"/>	View	Pending	123123123	Premier 5%	23235252	Building Account	05/31/2019	1.01	