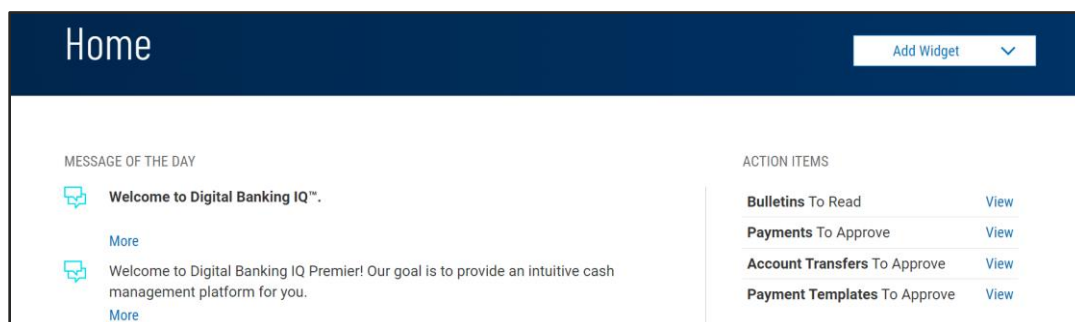


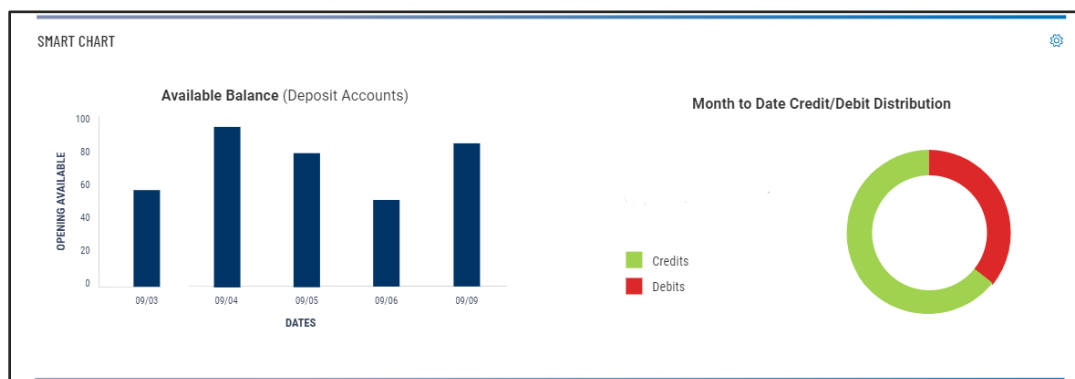
## Quick Reference Guide – Home (Dashboard)

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

Select

DATE

01/08/2021

TRANSACTION TYPE

Optional

Select

AMOUNT

Range

Optional

0.00

Hide Additional Filters

Submit

Cancel

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

Select

TO ACCOUNT

Select

TRANSFER DATE

08/02/2019

AMOUNT

0.00

MEMO

Optional

SUBMIT

Clear

# Quick Reference Guide – Home (Dashboard)

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

