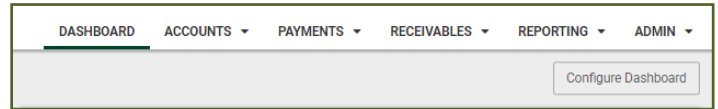


Dashboard

Use the Dashboard menu to view your accounts, news items, favorite reports, payments pending approval, and other available widgets. You can also make transfers and quickly access commonly used resource links.

Configure Dashboard

Adjust the layout by selecting *Configure Dashboard* in the top-right corner of the Dashboard. You can add, remove, edit, resize, and drag widgets to customize the Dashboard to work best for you.



Accounts

Use the accounts widget to view balances at a quick glance. Upon initial login, two account groups appear by default. No accounts appear until you assign accounts to the groups by selecting *Manage Groups*. You can also edit the group names and add or remove groups.

- **Manage Groups**
 - **Group Name** – Click the pencil icon to update the group name. Enter the name and click **Rename Group** to save.
 - **Add Accounts:** Select **Add Accounts** to assign accounts to a group. Select the box next to the accounts you want to assign to the group. Select **Add Accounts** to save.

NOTE: An account can only be assigned to one group. If an account is currently assigned to a group, you must first remove it before you can add it to another group. A group can have a maximum of 50 accounts assigned.

- **Create New Group** – Select **Create New Group** to create an additional group to assign accounts to. Enter a unique **Group Name** and then select **Add Accounts** to assign accounts.
- **Delete Group** – Select **Delete Group** to remove the group.

Accounts					Expand All	Collapse All
Group One Example (1)					Group available balance: \$8.36	
Account Number	Account Name	Current Balance	Collected Balance	Available Balance		
xxxxx3444	Test 3444	\$8.36	\$8.36	\$8.36	Details	
Group Two (1)					Group available balance: \$2.93	
Account Number	Account Name	Current Balance	Collected Balance	Available Balance		
xxxxx6976	Checking 6976	\$2.93	\$2.93	\$2.93	Details	

Manage Account Groups

Type to filter

Create New Group

You can create up to 20 groups to display in the widget. Each group can have a maximum of 50 accounts.

Group One Example (1)

Add AccountsDelete Group

Account Number	Account Type	Account Name	Available Balance	
xxxxx3444	Checking	Test 3444	\$8.36	Remove

Group Two (1)

Add AccountsDelete Group

Account Number	Account Type	Account Name	Available Balance	
xxxxx6976	Checking	Checking 6976	\$2.93	Remove

Done

TIP: Select **Details** to view current, collected, and available balances and line amounts. You can see a daily balance trend for the last 10 days and view the last 10 days of transactions.

Information Center

View news items in this widget. Select the drop-down arrows to expand or collapse these messages. Different icons may appear in this widget. A blue icon indicates information. A yellow icon indicates a warning. A black bell icon indicates an alert.

Resources

Access links to helpful and commonly used sites and guides provided by your financial institution in this widget.

Favorite Reports

The reports that have been marked as favorite appear in this widget.

Selecting a report in this widget takes you directly to that report, where you can view and customize the results, and create a custom report.

TIP: By default, the widget is blank. You must mark reports as favorites in the *Reporting Dashboard* for them to appear.

Favorite Reports	
Prior Day Transaction	 Run Report
Prior Day Checks Cleared	 Run Report

Quick Transfer

Create a simple one-to-one transfer without leaving the *Dashboard* using this widget.

- Use the fields or select **Search** to choose the account number or account name to transfer from and to.
- Enter the **amount** and **transfer date**.
- **Review** and **confirm** the transaction.

TIP: To initiate a bulk one-to-one, one-to-many, or many-to-one transfer, select **Advanced Transfer Options** to go to the *Create a Transfer - Internal Transfer* page.

Quick Transfer	
From Account: *	From Account 
To Account: *	To Account 
Amount: *	Amount
Transfer Date: *	08/24/2022 
Review Reset Advanced Transfer Options	

Positive Pay

View, pay, or return the exceptions that are pending approval in this widget.

Positive Pay	Check Exceptions (0)	ACH Exceptions (0)
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Payments Pending Approval

View, approve, or reject the transfer, ACH, or wire payments that are pending approval in this widget.

Payments Pending Approval	Transfer (0)	Loan Payment (0)	Wire (0)	ACH (0)
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Stop Payment Pending Approval

View, approve, or reject the stop payments that are pending approval in this widget.

Quick Loan Payment

Create a quick payment on a loan without leaving the *Dashboard* in this widget.

- Use the fields or select **Search** to choose the account number/name to transfer from or the loan number/name to transfer to.
- Enter the **amount** and **payment date**.
- **Review** and **confirm** the transaction.

TIP: To specify the payment type of *Principle Only*, select **Advanced Loan Payment Options** to go to the *Create Loan Payment – Loan Payment* page.

Quick Loan Payment	
From Account: *	From Account 
Loan Account: *	Loan Account 
Amount: *	Amount
Payment Date: *	08/24/2022 
Review Reset Advanced Loan Payment Options	