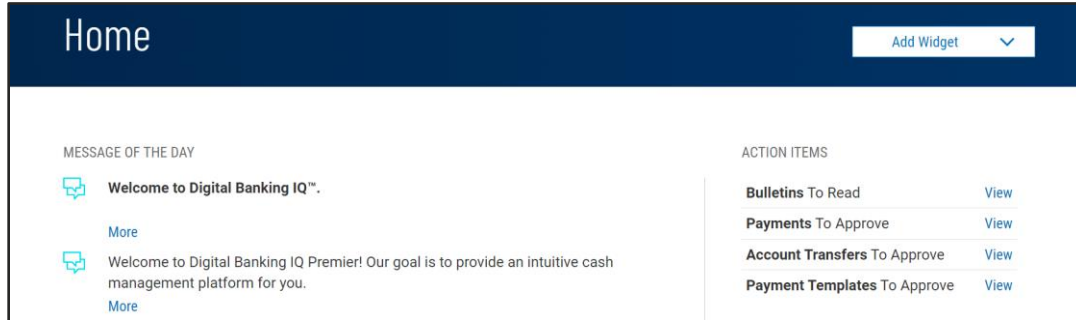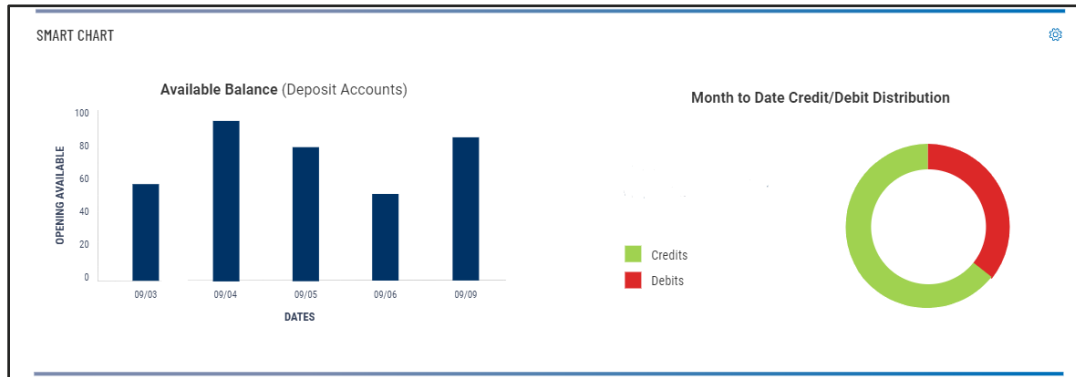# Quick Reference Guide – Home (Dashboard)

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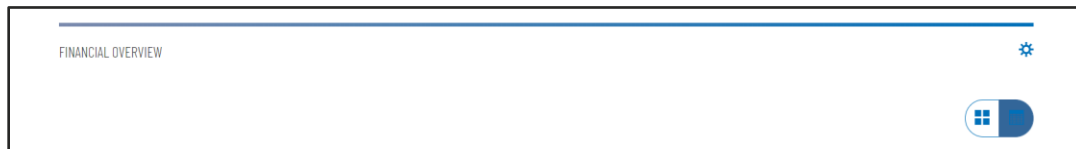
Pinned to the Home page is the Notification widget. It delivers important communication from your financial institution to you and highlights actions requiring your focus. This is not removable nor resizable.

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.

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<u>Tile view</u> 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

MY CHECKING TEST	NICKNAME SAVINGS	PREMIER CHECKING	SAVING 1234
ACCOUNT NUMBER 123123123	ACCOUNT NUMBER 888888	ACCOUNT NUMBER 5552572687	ACCOUNT NUMBER 8758888
CURRENT AVAILABLE $3,738.37	CURRENT AVAILABLE $9,185.98	CURRENT AVAILABLE $3,957.51	CURRENT AVAILABLE $2,742.22

TEST ACCOUNT 1	TEST ACCOUNT 2	TEST ACCOUNT 3	
ACCOUNT NUMBER 10010001	ACCOUNT NUMBER 10010002	ACCOUNT NUMBER 10010003	
CURRENT AVAILABLE $3,787.86	CURRENT AVAILABLE $1,540.95	CURRENT AVAILABLE $5,885.76	

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

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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	DATE
Select ▼	01/08/2021 📅

TRANSACTION TYPE Optional	AMOUNT Range Optional
Select ▼	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	TO ACCOUNT
Select ▼	Select ▼

TRANSFER DATE	AMOUNT
08/02/2019 📅	0.00

MEMO   Optional

SUBMIT   Clear

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