DASHBOARD

Treasury Internet Banking's dashboard acts as a landing screen that provides a high-level view of your financial information. The customizable dashboard allows you to manage simple tasks in order to enhance your banking experience. You can customize the dashboard view and create shortcuts for frequently used tasks to match your requirements.

You can view account balances, statements, calendar events, foreign exchange rates, and even initiate transfers through a single page.

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DASHBOARD DEFAULT VIEW

The Bank provides a default layout of the Dashboard view.

You can customize the *Dashboard* screen by adding frequently used widgets.

These widgets can be edited, added, removed, moved, renamed, expanded, or collapsed as per your personal preference.

The Account Balances widget is always present on the Dashboard and provides a synopsis of your accounts.

By default, all accounts are displayed on the *Account Balances* widget. You can change the widget settings and customize the viewing options as per your choice.

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			Rename Widget	>
ABCD Company	\$ 32,552,719,49	\$ 32,552,719,		

STEP 1: CHANGE WIDGET SETTINGS - EDIT SETTINGS

To change the settings for a widget:

- 1. Click the *Settings* icon the righthand corner of the widget header.
- 2. Select an appropriate option from the drop-down list (*Edit Settings, Edit Action Menu & Rename Widget*).

QUICK REFERENCE GUIDE

EDIT ACCOUNT SETT	INGS		8
Account View Name	Default View	Account Display	
		Set All	
All Accounts	•	Account Nickname	
Cancel	Done	Create View	

STEP 2: EDIT SETTINGS

Click the *Edit Settings* option; an *Edit Account Settings* overlay will be displayed.

The overlay consists of *Account View Name*, *Default View*, *Account Display* headers.

- 1. To create additional account views, click on the *Create View* button.
- 2. Enter the new account view name.

CREATE ACCOUNT V	8	
Step 1 of 2 Create Accou	unt View	
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3. Click Next.

- 4. Select the appropriate accounts from the *Available Accounts* lists.
- 5. Click *Done* to complete the process.

You will return to the *Edit Account Settings* overlay. The newly created account view will be displayed on this overlay.

You may create as many account views as you like; accounts may be included in multiple views.

QUICK REFERENCE GUIDE

In the Edit Account Settings overlay, you can define the *Default View* and choose to display Account Numbers, also known as Account IDs, instead of Account Nicknames:

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STEP 3: ACCOUNT NUMBERS

- 1. Use the Default View radio button to determine which account list should be displayed when you first log into Treasury Internet Banking.
- 2. Select the Account Display as Account ID.
- 3. Click Done to save the changes.

The Dashboard should now display the Account Balances widget with the newly created account view.

Use the dropdown list in the right-hand corner of the Account Balances widget to display a different account view.

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*********1	\$ 197,592.00 As Of 12/24/2021 14:09	\$ 197,592.00 As Of 12/24/2021 14:09	•

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ACCOUNT BALANCES		Savings Accounts	`× ¢
Checking 🔺	Opening Available	All Accounts	Action
*********0	\$ 32,552,719.49 As Of 12/24/2021 14:09	Savings Accounts	× 🗖

EDIT ACCOUNT SETTINGS							
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All Accounts		0	Acc	ount Nickname 🔹 🔻			
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QUICK REFERENCE GUIDE

ACCOUNT BALANCES	54	vings Accounts	<u>-</u> 22 ¢
Checking 🔺	Opening Available	Interim Available 🔺	Action
********0	\$ 32,552,719.49 As Of 12/24/2021 14:09	\$ 32,552,719.49 As Of 12/24/2021 14:09	•
**********	\$ 197,592.00 As Of 12/24/2021 14:09	\$ 197,592.00	
		Account Activity Export	>
		Create Stop Payment	>
		Create Transfer	>
		View Account Activity	>
		View Current	>
		View Prior Day	>
STATEMENTS	0	QUIC View Statement	>

Edit Settings >

STEP 4: CHANGE WIDGET SETTINGS – EDIT ACTION MENU

The Account Balances widget includes a configurable action menu that provides quick access to banking activities such as viewing the account's activity, initiating a transfer, or placing a stop.

The actions available are based on user and account entitlements.

To edit or remove actions,

- 1. Click the *Settings* icon 🗘 on the righthand corner of the widget header.
- 2. Click the *Edit Action* Menu option.

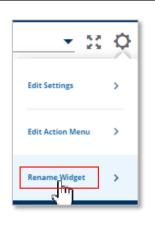
vailable Actions	Your Selections	
elect checkboxes to move items to Your Selections.	To remove items, deselect the checkbox.	
Actions	Selected Actions	
View Account Activity	View Account Activity	
View Prior Day	View Prior Day View Current Day	
View Current Day	View Statement	
View Statement	Create Transfer Create Stop Payment	2
Crasta Transfor	 Account Activity Export 	12

On *Edit Action Menu* overlay, you can select or deselect options using the checkbox. The Actions column shows all actions that are available for selection.

The *Selected Actions* header shows all actions available.

- 1. Click the checkbox for each action preferred.
- 2. *Click Done* to close the overlay and save the settings.

QUICK REFERENCE GUIDE





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DASHBOARD	ACCOUNTS ~	PAYMENTS -	TRANSFERS -	CHECK SERVICES ~	REPORTS ~
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STEP 5: CHANGE WIDGET SETTINGS – RENAME WIDGET

 Click on the Settings icon O on the righthand corner of the widget header and select the Rename Widget option.

An Account Balances overlay will be displayed.

2. Enter a new customized name and click *Done*.

You will be navigated to the *Dashboard* and the widget will be displayed with the new customized name.

STEP 6: MOVE WIDGET

You can customize the location of any widget except the Account Balances widget. To move a widget:

- 1. Click on the widget.
- 2. Hold the mouse down and drag the widget to the desired position on the *Dashboard*.

STEP 7: MANAGE WIDGETS

The Dashboard header has a Manage Widgets option which allows you to add new widgets and manage the existing widgets.



QUICK REFERENCE GUIDE

MANAGE WIDGETS ⊗ Add Widgets Click or Tap the title to rename the widget +BALANCES CHART +CURRENCY CONVERTER EVENTS +Ŵ EVENTS +FX RATES +QUICK TRANSFER OUICK TRANSFER Ŵ

duplicate instances of the same widget.

Dashboard view. Additionally, you can

customize the widget names and add

Click the Manage Widgets option.

The Manage Widgets overlay displays all

available widgets whether selected or not, allowing the ability to add or delete from the

ADDING A WIDGET TO THE DASHBOARD

Click the + icon to add a new or duplicate widget to the Dashboard. Rename the widget if desired.

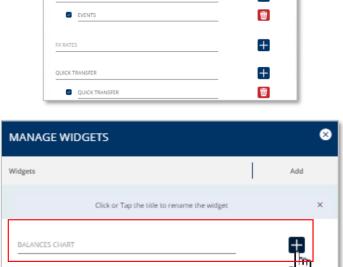
REMOVING A WIDGET

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Click the delete icon to remove a widget from the Dashboard.

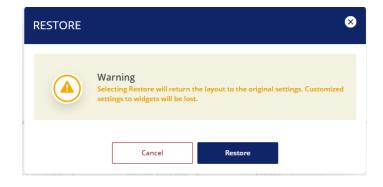
MANAGE WIDGETS		×
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CURRENCY CONVERTER



QUICK REFERENCE GUIDE

DASHBOARD	ACCOUNTS -	PAYMENTS ~	TRANSFERS ~	CHECK SERVICES -	REPORTS -
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STEP 8: RESTORE THE DASHBOARD

To restore the Dashboard widgets to the default setting:

- 1. Click the Restore option in the Dashboard heading.
- 2. Confirm the request by clicking Restore again on the warning message.