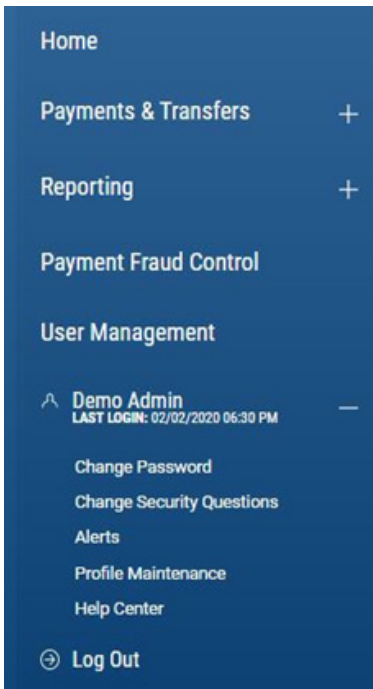# Quick Reference Guide - Basic Navigation

MAIN MENU

Click on the 3-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. Expand your User Name to show user account related additional menu, including Help Center:


HOME PAGE

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).

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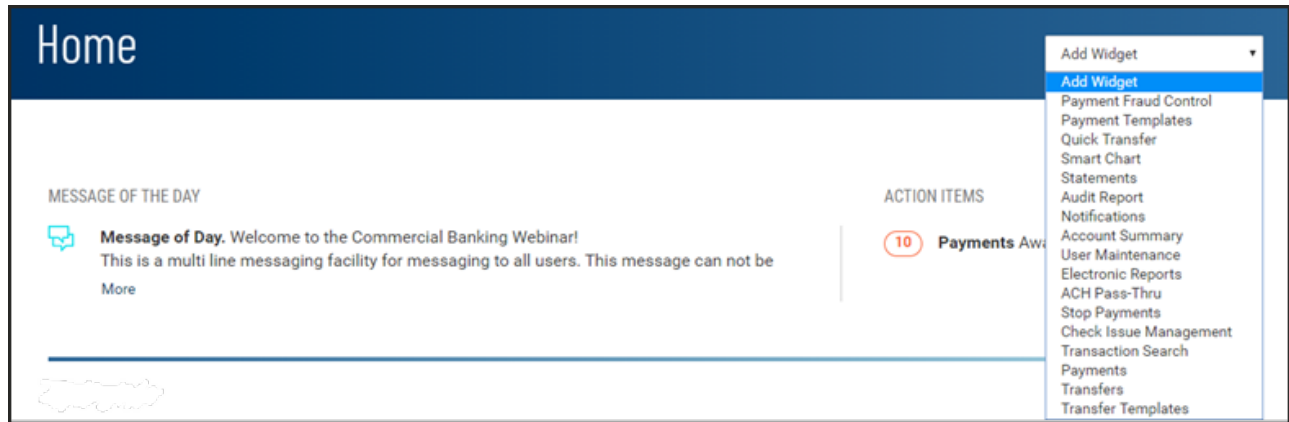
Any widgets on any workspace with a gear icon ⚙ in the upper right corner means it can be repositioned (moved), resized or deleted (removed):

To move a widget, just click on the top part of the widget being moved, then drag and drop:
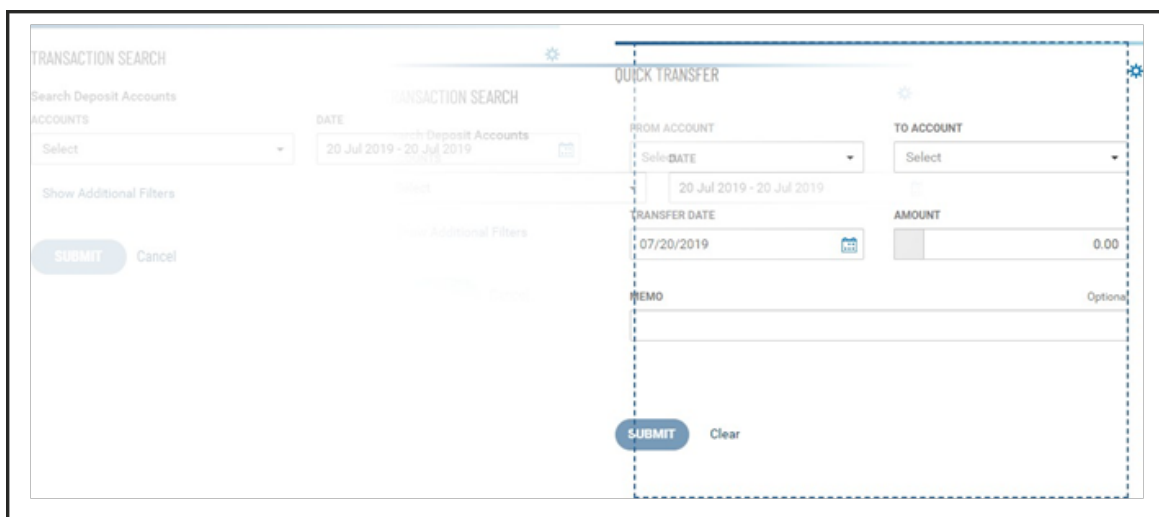
WIDGET

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 –

3. Print the data you see or export all of the data in the widget within your range settings –

4. Sort data in a column by clicking on the header

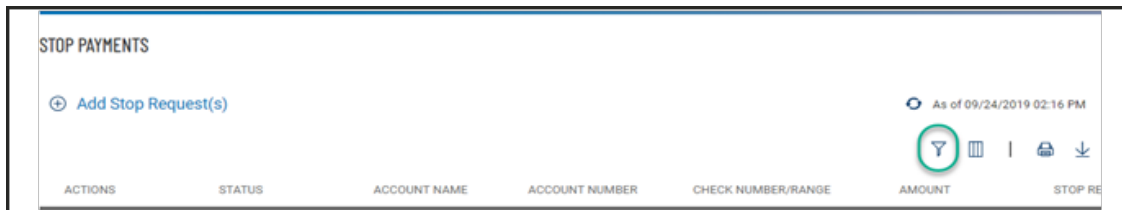
↑ Indicates sorted column

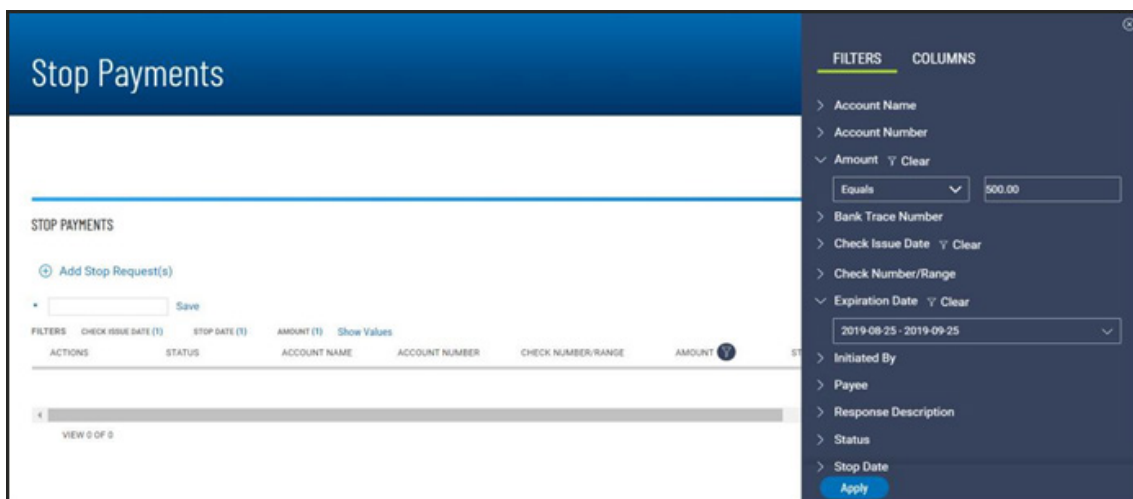5. Click on column icon to arrange order of column display
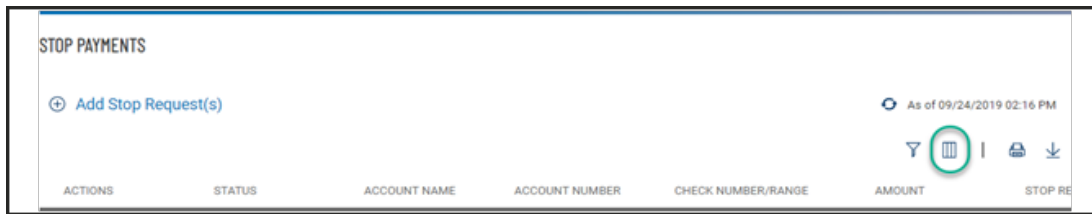
From the slide-out menu, select and deselect desired data, drag and drop data to rearrange order
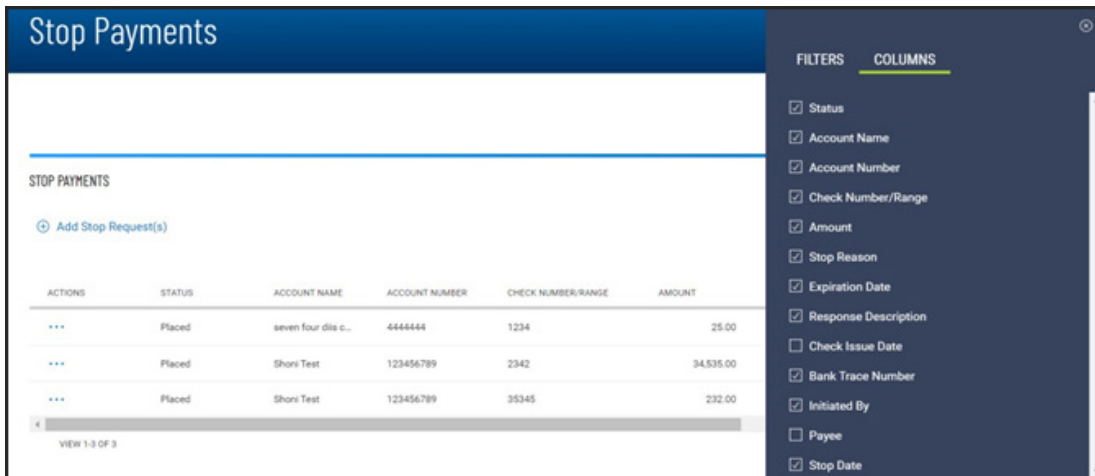
6. Click on filter icon to narrow in on specific transactions

From the slide-out menu, select data to filter and set perimeters to zone in on the transactions
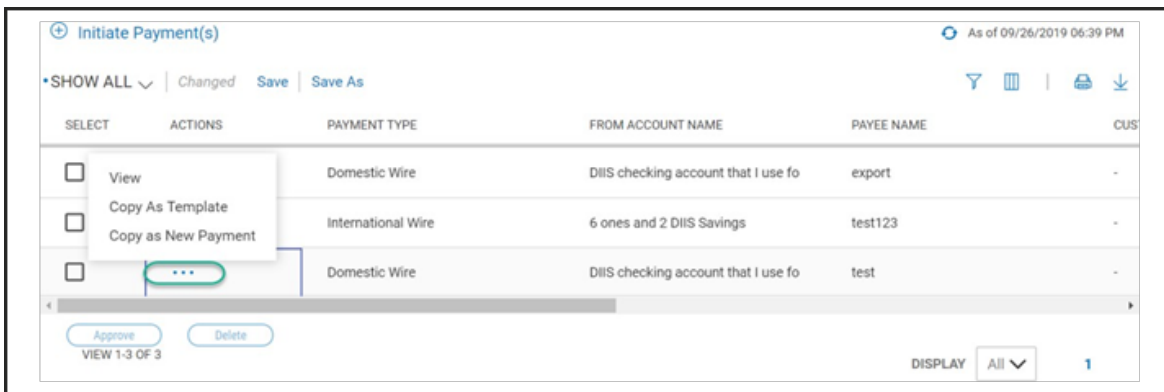
7. Save your personalized view for reuse
When you adjust the default view by sorting a column, changing column display order, adding/removing column(s) or filtering any data, input filed automatically presents for you to save that view with a unique name
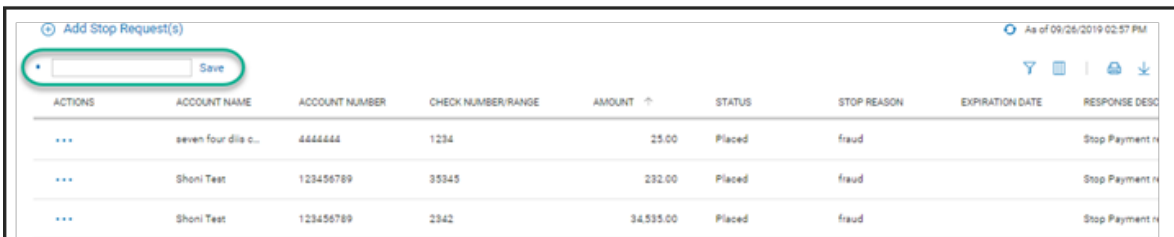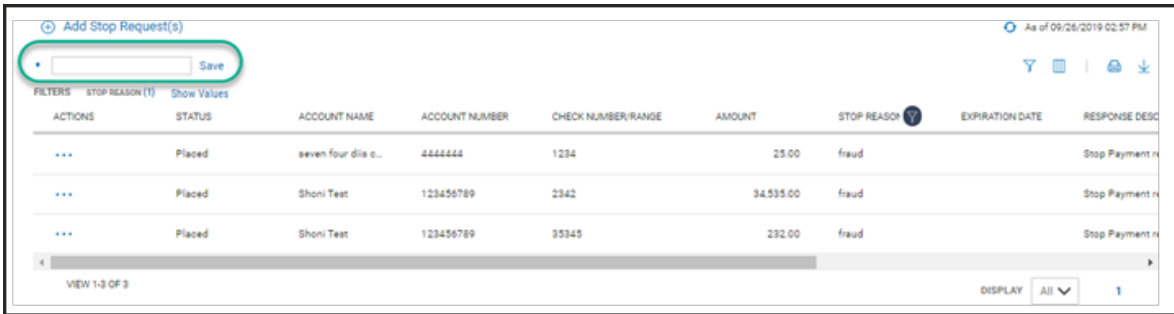
8. Take individual or bulk action
    • Individual action

• Bulk action