

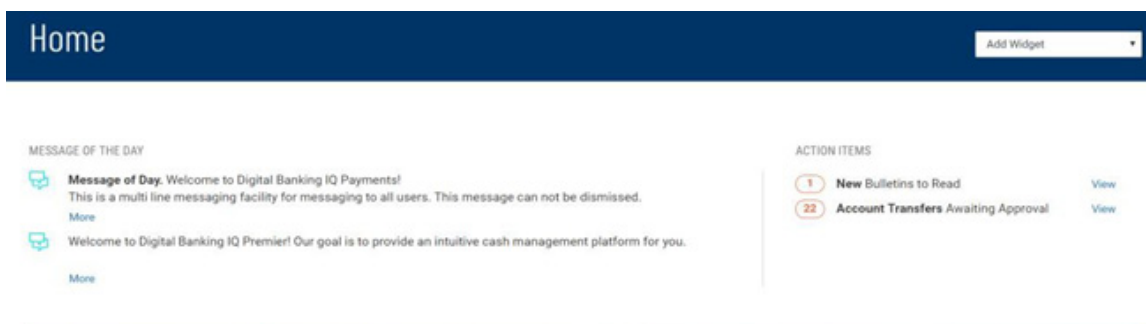
Bangor Savings Bank[®]

Treasury and Payment Services

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 Account Summary widget on the Home page. It provides 4 options to access your account information:

- 1. ALL ACCOUNTS** – There are two formats: (1) a tabular, list view or (2) a tile view. If you have 20 or fewer accounts, the Account Summary 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.
- 2. BALANCE HISTORY** – Provides summary account balances information for the accounts selected of a given date.

- 3. **ACCOUNT ACTIVITY** – Provides the convenience for you to save frequently utilized Transaction Search criteria for reuse.
- 4. **EXPORT** – Offers you the ability to export account balances and transaction information in multiple formats, accounts and dates.



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.

A screenshot of the "TRANSACTION SEARCH" widget. It features a settings gear icon in the top right corner. The main heading is "TRANSACTION SEARCH". Below it is the sub-heading "Search Deposit Accounts". The form includes:

- "ACCOUNTS": A dropdown menu with "Select" as the current value.
- "DATE": A date range selector showing "02 Aug 2019 - 02 Aug 2019" with a calendar icon.
- "TRANSACTION TYPE": A dropdown menu with "Select" as the current value, labeled "Optional".
- "AMOUNT Range": A text input field containing "0.00", labeled "Optional".

At the bottom, there is a "Hide Additional Filters" button, a "SUBMIT" button, and a "Cancel" link.

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.

A screenshot of the "QUICK TRANSFER" widget. It features a settings gear icon in the top right corner. The main heading is "QUICK TRANSFER". The form includes:

- "FROM ACCOUNT": A dropdown menu with "Select" as the current value.
- "TO ACCOUNT": A dropdown menu with "Select" as the current value.
- "TRANSFER DATE": A date selector showing "08/02/2019" with a calendar icon.
- "AMOUNT": A numeric input field with a slider and "0.00" as the current value.
- "MEMO": A text input field, labeled "Optional".

At the bottom, there is a "SUBMIT" button and a "Clear" link.

Here is an example of the Home page with default widgets

Home

Add Widget

MESSAGE OF THE DAY

Message of Day. Welcome to the Commercial Banking Webinar!
This is a multi line messaging facility for messaging to all users. This message can not be dismissed.
[More](#)

ACTION ITEMS

10 **Payments Awaiting Approval** [View](#)

SMART CHART

Available Balance (Deposit Accounts)

DATE	OPENING AVAILABLE
09/03	55
09/04	95
09/05	80
09/06	50
09/09	85

Month to Date Credit/Debit Distribution

\$122,017.00
TOTAL

■ Credits
■ Debits

ACCOUNT SUMMARY

[ALL ACCOUNTS](#) [BALANCE HISTORY](#) [ACCOUNT ACTIVITY](#) [EXPORT](#)

DEPOSIT ACCOUNTS

TODAY'S OPENING LEDGER **\$17,867.37** CURRENT AVAILABLE **\$10,733.56**

As of 09/22/2019 10:29 AM

ACCOUNT NAME	ACCOUNT NUMBER	TODAY'S OPENING LEDGER	CURRENT AVAILABLE
Premier 5%	123123123	Not Available	1849.27
Building Account	23235252	Not Available	3376.6
Capital Account	123456789	Not Available	5507.69

VIEW 1-3 OF 3

DISPLAY All 1

TRANSACTION SEARCH

Search Deposit Accounts

ACCOUNTS DATE

Show Additional Filters

QUICK TRANSFER

FROM ACCOUNT TO ACCOUNT

TRANSFER DATE AMOUNT

MEMO Optional