



Online Business Banking Dashboard Overview

The dashboard provides an at-a-glance view of your business finances that allows you to click through your critical financial tasks – all from one user-friendly screen. Smart technology tracks the features you use most often and makes them available via a single click right from the dashboard, creating a dynamic display that evolves right in step with your business. The dashboard can be accessed at any time by simply selecting Dashboard from the dropdown menu or clicking on My Dashboard at the top of every page.

The screenshot shows the BankFinancial Online Business Banking dashboard. At the top, there is a navigation bar with 'My Dashboard', 'Help', 'Bulletin', 'Contact Us', 'Support Center', and 'Logout'. Below this is a 'Dashboard' dropdown menu (callout 5). The main content area is divided into several sections:

- Message of the Day** (callout 1): A box containing a welcome message.
- Financial Overview** (callout 2): A table showing account balances as of 5/13/2017 10:45:33 CST. It includes sections for Deposits and Investments.
- Action Required** (callout 3): A section with a green checkmark and the text 'Watch here for transaction review or approval'.
- Most-Used Services** (callout 4): A list of services including Positive Pay, ACH Batch Maintenance, Account History, Remote Deposit Capture, and ACH Batch Approval.
- Favorite Reports**: A section for setting up favorite account balance and transaction reports.

At the bottom, there is an 'Administration' section with an 'Add User' button and a table with columns for User ID, User Name, User Type, and Go To User.

1. **Message of the Day** - Keeps you up-to-date on important messages from *BankFinancial*.
2. **Financial Overview** - Provides a snapshot of up to 15 accounts and balances. With one click on any balance amount, you'll see pertinent account details.
3. **Action Required** - Helps you stay on top of any pending items that need your attention. The links drive you directly to your task – so you can handle it with just a few clicks.
4. **Most Used Services** - Maps to the functions you visit most for quick, one-click access. Because it automatically learns and remembers your most-used functions, this section dynamically shifts to custom-fit each user – so your “Most-Used Services” can be quite different from other users in your company.
5. **Bulletins** - Alerts you, via a pop-up box at login, of important messages from *BankFinancial*.



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The screenshot displays the Online Business Banking Dashboard Overview. It features three main sections:

- Administration (6):** A table listing users with columns for User Id, User Name, User Type, Go To User, and actions (Detail, Edit, Delete, Copy). The table shows three users: Ann White (User), Doug Jones (User), and Joe Smith (Admin). A red circle with the number 6 is placed over the 'User Type' column.
- Transfer (7):** A form for making a transfer, including fields for 'From' and 'To' accounts, 'Amount', and 'On' date. A red circle with the number 7 is placed over the 'Amount' field.
- Favorite Reports (8):** A section for setting up favorite reports, with a red circle and the number 8.

- 6. Administration** - Lets administrators view and easily manage user access – from adding new users to changing existing users’ permissions.
- 7. Book Transfer** - Gives you immediate access to one-time transfers. Simply select the “From” and “To” accounts, the dollar amount and submit. We’ll receive your transfer in real time and you’ll get an on-screen confirmation.
- 8. Favorite Reports** - Generates your most pertinent account and balance reports with a single click. You define the report templates that can be run again and again – so you get the information you need, anytime you want it. You are also given the option to share your reports with other users in your company.