Digital One Business Internet Banking Dashboard Guide

BANKING | LENDING | WEALTH MANAGEMENT

Bankers Trust®
Member FDIC

Basic Functions

Adding Panels

1. Select Display Options to open the Dashboard Preference page, which provides a sample of each panel available to the user based on their roles and entitlements.

Display Options

2. Select + to add a panel to the list.
3. Click the 'Save' button.

Moving Panels

1. Select Display Options to open the Dashboard Preference page.

Display Options

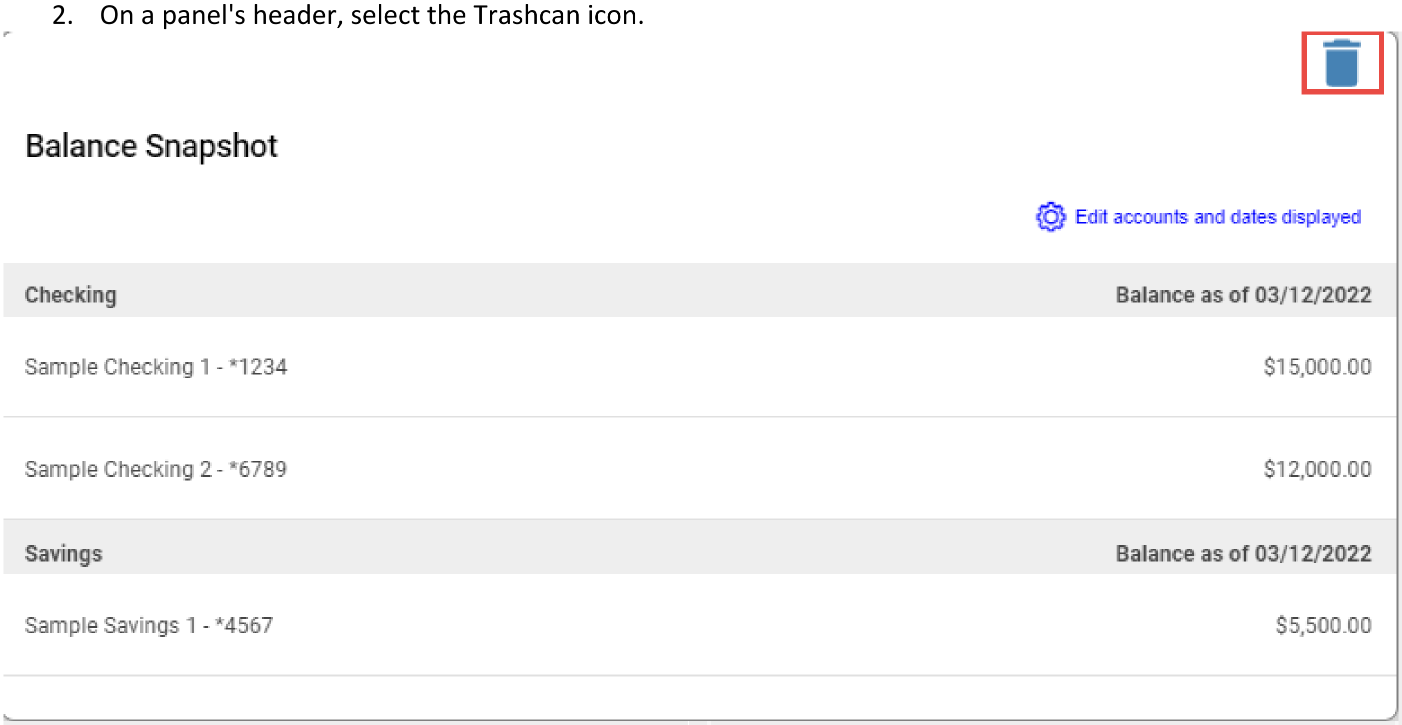
2. Select a panel's title and drag the panel to the desired location. The mouse pointer changes to the move icon, indicating the panel can be moved. A dotted outline appears on the page, indicating the location to which the panel can be moved.
3. Click the 'Save' button.

Deleting Panels

1. Select Display Options.

Display Options

2. On a panel's header, select the Trashcan icon.

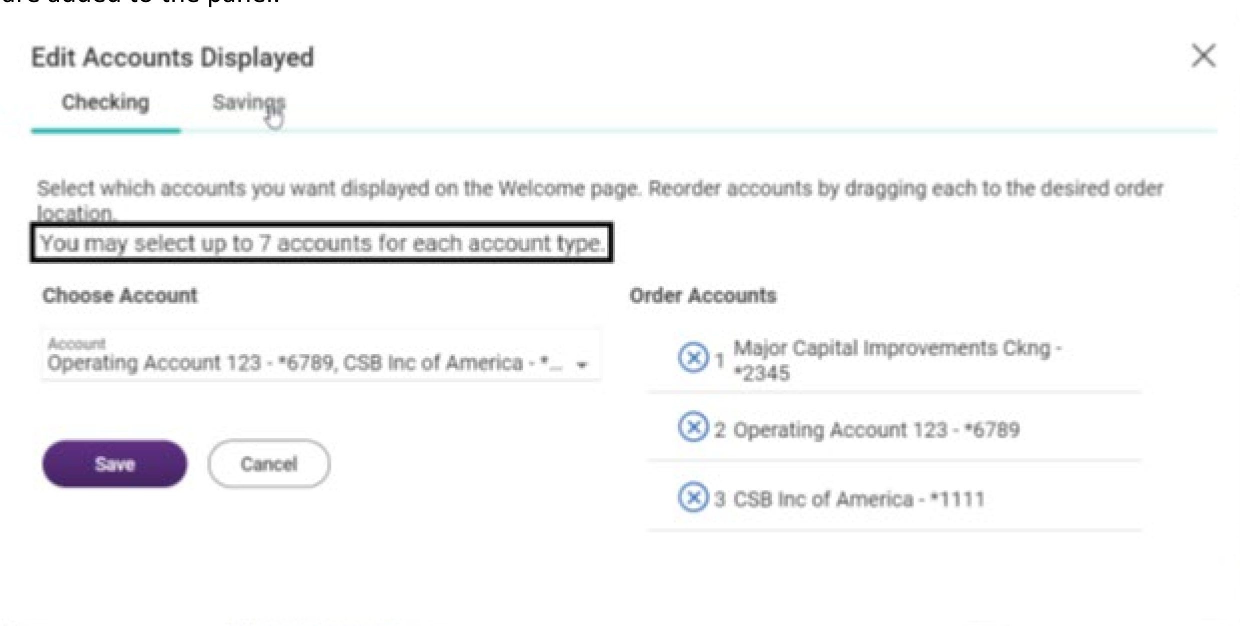


3. Click the 'Save' button.

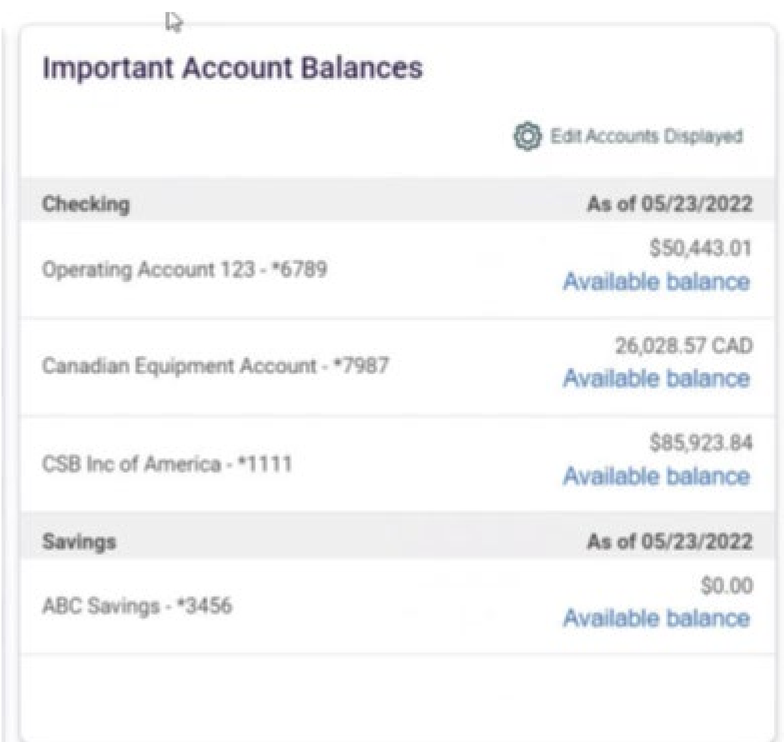
About the Panels

Important Account Balances Panel

View important account balances in one location! Select **Edit accounts displayed** and choose up to 7 accounts for each account type and drag them to the desired order. Accounts are grouped together by type after they are added to the panel.

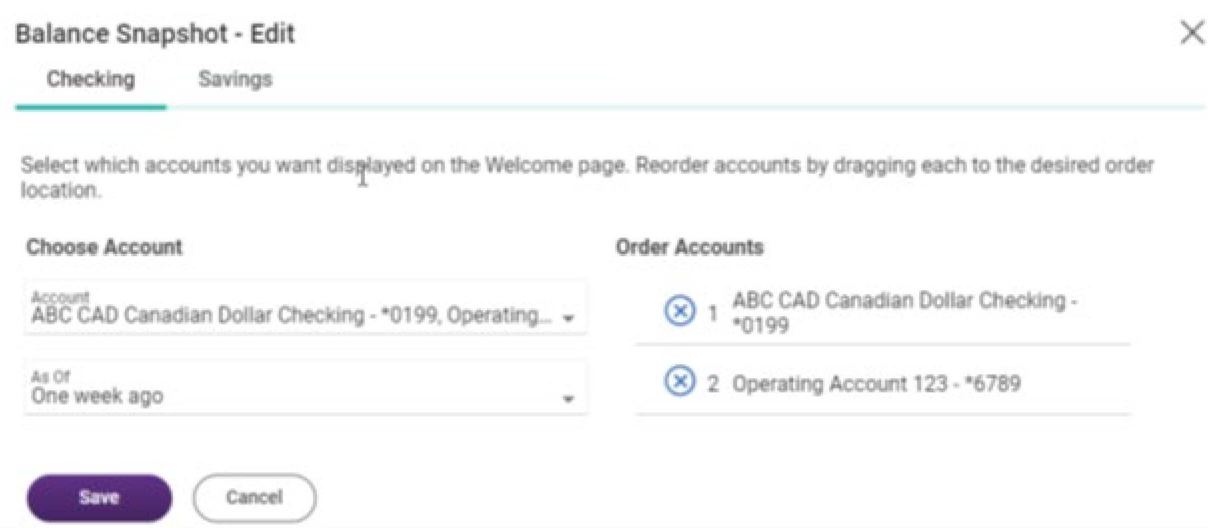


Click Available balance for quick access to more detail.

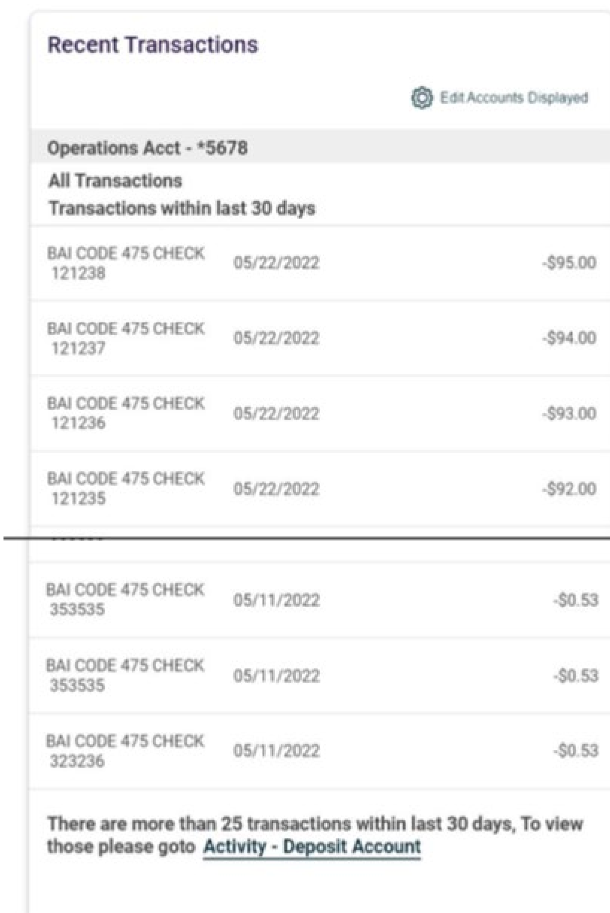


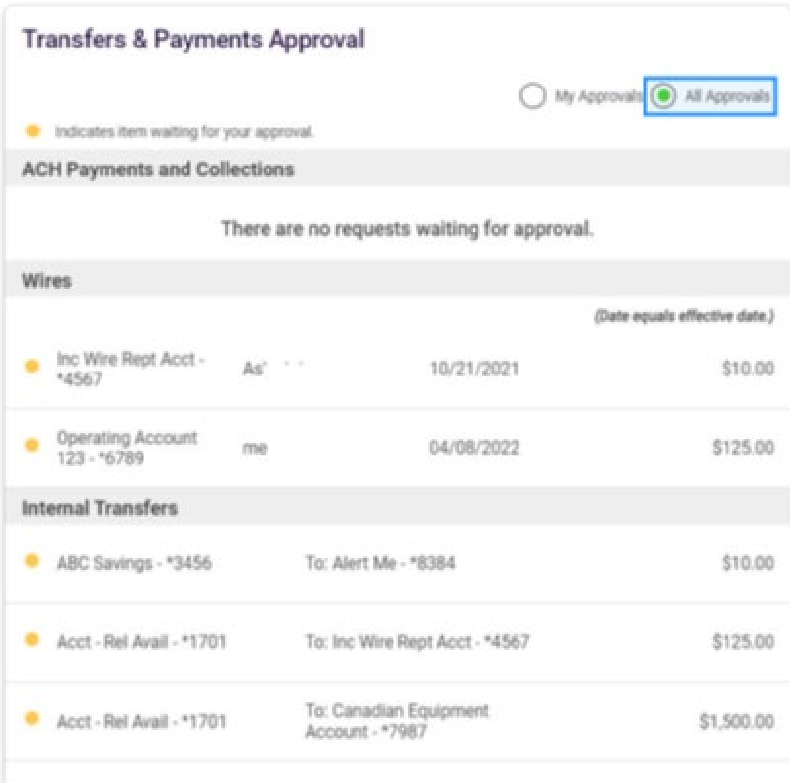
Balance Snapshot Panel

Add this panel to view balances on accounts for a specific date in the past. Select **Edit accounts** and the **As of date** to set up the account balances. Choose the accounts and drag and drop in the preferred order. If you have multiple account types, choose tabs across the top to select or remove an account from the panel.

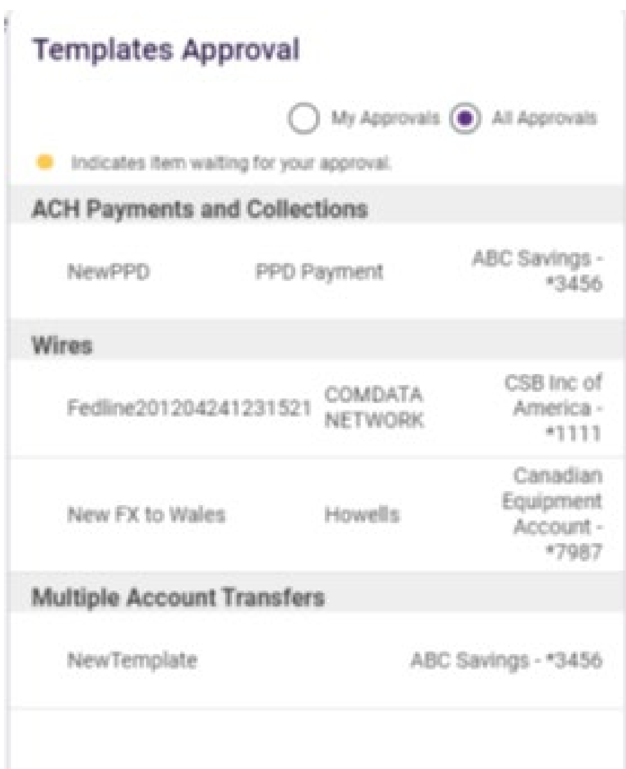


Recent Transactions Panel
View 25 transactions from the last 30 calendar days for a checking or savings account. Each Recent Transactions Panel only supports one account type. To view recent transactions for both checking and savings account, add multiple copies of the Transactions panel. If more than 25 transactions are available for the last 30 days for the selected transaction type, a message appears with a hyperlink to a page that displays all the transactions. Drop-down arrows beside the account type heading provides access to pages where more detail can be obtained.





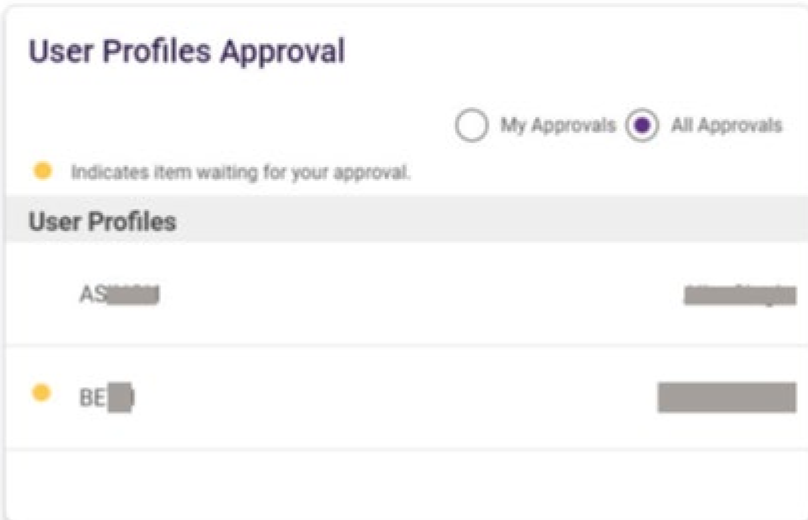
Transfers & Payments Approval Panel
View transfers and payments pending approval for ACH, Wires, Loan Payments, Loan Advances, External Transfers, and Internal Transfers. Select 'My Approvals' to view pending transactions for the specific user or 'All Approvals' to view all requiring approval. Click any of the transactions to take the appropriate action on the request. If there are no transactions pending approval for a particular service, the following message appears: *There are no exceptions waiting for approval.*



Templates Approval Panel
Add this panel to view and decision any templates pending approval for ACH, Wires or Transfers. Select 'My Approvals' for the specific user or 'All Approvals' to view all templates requiring approval for the company. Click any of the items to review and take the appropriate action on the request.

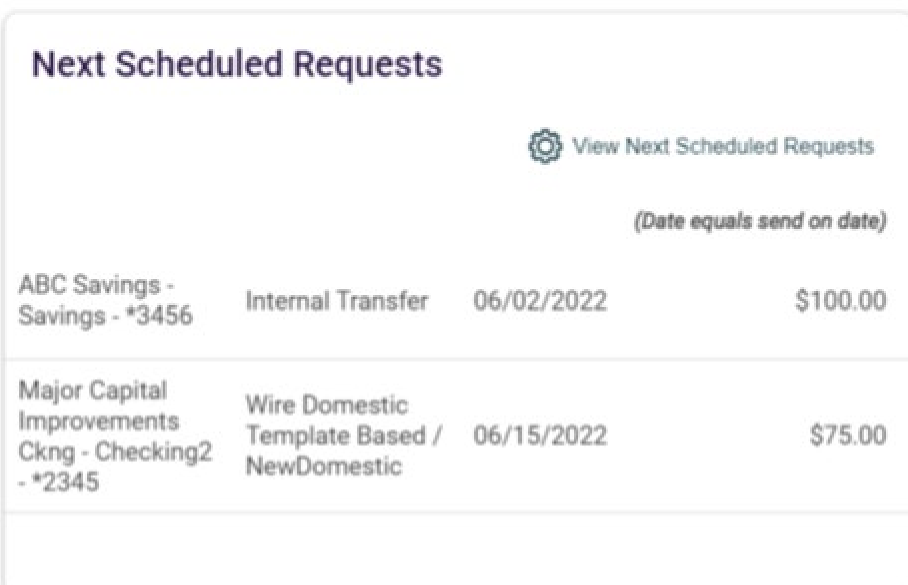
User Profiles Approval Panel

Use this panel to view and approve new system users or changes to existing users that are pending approval. Select the user profile to go to the associated pages to review and approve. Select ‘My Approvals’ to view those only for the specific user or ‘All Approvals’ to view all profiles requiring approval for the company. If no profiles are pending approval, the following message appears: *There are no profiles waiting for approval.*



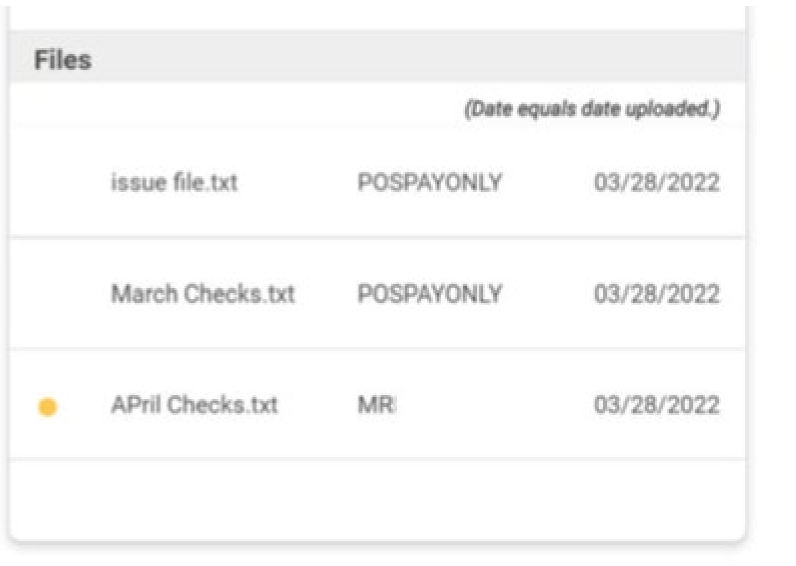
Next Scheduled Requests Panel

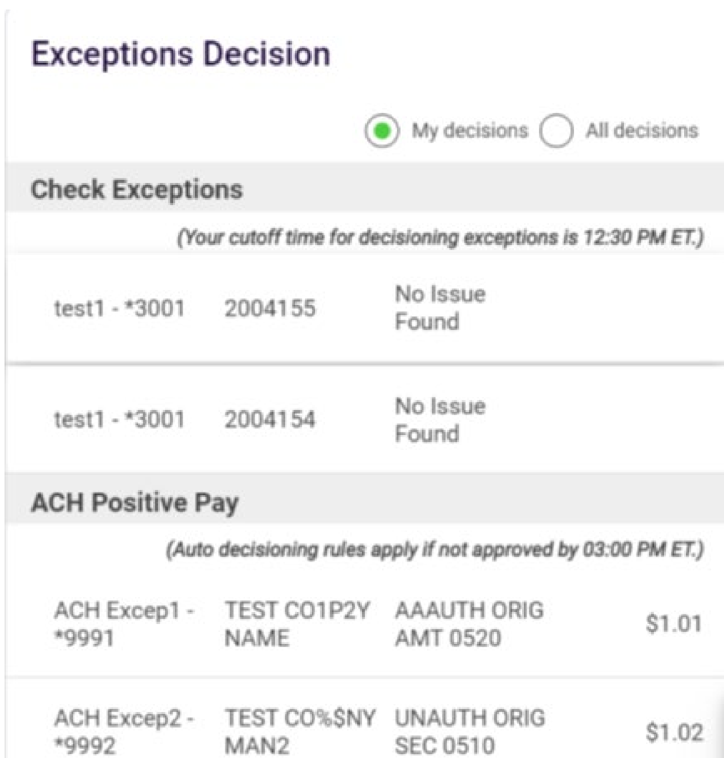
Use this panel to view scheduled requests. Only the requests that the user is entitled to view or approve are shown. This panel automatically expands to support viewing of unlimited requests without scrolling. Select any item to open the appropriate page for action.



Issues & Issue Files Approval Panel

Add this panel to review and decision check issues and files that are pending approval. Users can view only those issues and files requiring their approval or all issues and files requiring approvals. Select any item to open the appropriate page for action.





Exceptions Decision Panel

Use this panel to review and decision any check and ACH exceptions. Select 'My decisions' to view those for a specific user or 'All decisions' to view all decisions requiring approvals. Select any item to open the appropriate page for action. If more than 20 check issues require approval or a decision, the following message appears: *More than 20 exceptions to display. To view exceptions, go to Exceptions Manager*.
If the user has no check exceptions that require a decision or approval, the following message appears: *There are no exceptions waiting for your approval.*