

Digital One Business Internet Banking Dashboard Guide

BANKING | LENDING | WEALTH MANAGEMENT



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.



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.



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.



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



Balance Snapshot

 [Edit accounts and dates displayed](#)

Checking		Balance as of 03/12/2022
Sample Checking 1 - *1234		\$15,000.00
Sample Checking 2 - *6789		\$12,000.00
Savings		Balance as of 03/12/2022
Sample Savings 1 - *4567		\$5,500.00

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.

Edit Accounts Displayed

Checking

Savings

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location.

You may select up to 7 accounts for each account type.

Choose Account

Account

Operating Account 123 - *6789, CSB Inc of America - *...

Order Accounts

1 Major Capital Improvements Ckng - *2345

2 Operating Account 123 - *6789

3 CSB Inc of America - *1111

Save

Cancel

Click Available balance for quick access to more detail.

Important Account Balances	
Edit Accounts Displayed	
Checking	As of 05/23/2022
Operating Account 123 - *6789	\$50,443.01 Available balance
Canadian Equipment Account - *7987	26,028.57 CAD Available balance
CSB Inc of America - *1111	\$85,923.84 Available balance
Savings	As of 05/23/2022
ABC Savings - *3456	\$0.00 Available balance

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.

Balance Snapshot - Edit

Checking

Savings

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location.

Choose Account

Account

ABC CAD Canadian Dollar Checking - *0199, Operating...

As Of

One week ago

Order Accounts

1 ABC CAD Canadian Dollar Checking - *0199

2 Operating Account 123 - *6789


Save

Cancel

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.

Recent Transactions

 Edit Accounts Displayed

Operations Acct - *5678

All Transactions

Transactions within last 30 days

BAI CODE 475 CHECK 121238	05/22/2022	-\$95.00
BAI CODE 475 CHECK 121237	05/22/2022	-\$94.00
BAI CODE 475 CHECK 121236	05/22/2022	-\$93.00
BAI CODE 475 CHECK 121235	05/22/2022	-\$92.00
...		
BAI CODE 475 CHECK 353535	05/11/2022	-\$0.53
BAI CODE 475 CHECK 353535	05/11/2022	-\$0.53
BAI CODE 475 CHECK 323236	05/11/2022	-\$0.53

There are more than 25 transactions within last 30 days, To view those please goto [Activity - Deposit Account](#)

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.*

User Profiles Approval

☐ My Approvals
 ☒ All Approvals

● Indicates item waiting for your approval.


User Profiles

AS	
● BE	

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.

Next Scheduled Requests


 View Next Scheduled Requests

(Date equals send on date)

ABC Savings - Savings - *3456	Internal Transfer	06/02/2022	\$100.00
Major Capital Improvements Ckng - Checking2 - *2345	Wire Domestic Template Based / NewDomestic	06/15/2022	\$75.00

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.

Files		
(Date equals date uploaded.)		
issue file.txt	POSPAYONLY	03/28/2022
March Checks.txt	POSPAYONLY	03/28/2022
 April Checks.txt	MRI	03/28/2022

Exceptions Decision			
		<input checked="" type="radio"/> My decisions	<input type="radio"/> All decisions
Check Exceptions			
(Your cutoff time for decisioning exceptions is 12:30 PM ET.)			
test1 - *3001	2004155	No Issue Found	
test1 - *3001	2004154	No Issue Found	
ACH Positive Pay			
(Auto decisioning rules apply if not approved by 03:00 PM ET.)			
ACH Excep1 - *9991	TEST CO1P2Y NAME	AAAUTH ORIG AMT 0520	\$1.01
ACH Excep2 - *9992	TEST CO%\$NY MAN2	UNAUTH ORIG SEC 0510	\$1.02

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.*