

Dashboard

Quick Reference Guide

Business Online Banking Dashboard

The dashboard features the INTRUST Bank logo and navigation menu (Message Center, ACCOUNTS, PAYMENTS, REPORTING, ADMIN) at the top. The main content is divided into several sections:

- My Dashboard:** Includes a 'Configure Dashboard' button and a 'New Test Group (2)' section with a table of accounts.

Account Number	Account Name	Current Balance	Collected Balance	Available Balance	Details
80xxxxxxxx0210	Checking	\$749,326.10	\$749,326.10	\$749,326.10	Details
80xxxxxxxx0310	Checking	\$65,047.66	\$65,047.66	\$65,047.66	Details
- Payments Pending Approval:** A table of pending transactions with 'Approve', 'Reject', and 'Reset' buttons.

Transaction ID	Wire Type	Debit Account	Beneficiary Name	Currency	Wire Amount	Effective Date	Created Date	Status
W000000091225	Domestic	2021	Beneficiary 4	USD	\$5.00	04/16/2021	04/16/2021	Pending Approval
W000000091226	Domestic	2021	Beneficiary 3	USD	\$12.00	04/16/2021	04/16/2021	Pending Approval
- Positive Pay:** A table of check exceptions with 'Pay' and 'Return' radio buttons.

Pay	Return	Account	Check Number	Paid Amount	Issued Amount	Posted Date	Issued Date	Issued Payee	Exception Reason
<input checked="" type="radio"/>	<input type="radio"/>	2018	View Check 8090	\$80.90	\$80.90	04/15/2021	04/15/2021		Payee mismatch
<input type="radio"/>	<input checked="" type="radio"/>	2018	8091	\$80.11	\$80.91	04/15/2021	04/15/2021		Amount mismatch
<input type="radio"/>	<input checked="" type="radio"/>	2018	View Check 8092	\$80.92	\$80.92	04/15/2021	04/15/2021		Payee mismatch
<input type="radio"/>	<input checked="" type="radio"/>	2018	View Check 8093	\$80.93	\$80.93	04/15/2021	04/15/2021		Payee mismatch
- Information Center:** Contains 'ACH Changes for 2021' and 'Welcome to Intrust Bank' notifications.
- Resource:** Includes 'Helpful Hints for ACH' and '2021 Federal Reserve Holiday Schedule'.
- Quick Transfer:** A form with fields for 'From Account', 'To Account', 'Amount', and 'Transfer Date', plus 'Review' and 'Reset' buttons.
- Favorite Reports:** Includes 'Prior Day Balance' and 'Current Day Transaction' reports with 'Run Report' buttons.

1 Quick access to the Message Center where you can securely message INTRUST Treasury Services.

2 Quickly navigate to Account information, Payment tasks, Reporting, and Admin tasks if in an admin role.

3 Feature widgets

4 Information Center and Resource sections provide quick access to tools and timely information.

Business Online Banking Dashboard

Manage the Accounts Widget

The screenshots illustrate the following steps:

- Click **Manage Groups**.
- Click the pencil icon next to the current/default Group name.
- Key in the new group name and click **Rename Group**.
- The new group name displays.

Accounts widget for quick access to the account(s) and balances you frequently manage.

To set up this widget:

- 1 Click **Manage Accounts**.
- 2 Click the pencil icon next to the current/default Group name.
- 3 Key in the new group name and click **Rename Group**.
- 4 The new group name displays.

Business Online Banking Dashboard

Naming the Accounts Widget Groups

Manage Account Groups

Type to filter

1 You can create up to 20 groups to display in the widget. Each group can have a maximum of 50 accounts.

2 **Group One (2)**

Account Number	Account Type	Account Name	Available Balance
xxx5570	Checking	Checking	\$0.00
xxx8477	Savings	Savings	\$21,075,921.77

Group Two (0)

In addition to managing the accounts for viewing within the widget, you can also customize the name of the account groups.

1 Click **Manage Groups**.

2 Click **Add Accounts**.

3 Select the accounts from your list and click **Add Accounts**.

You can do this for up to 20 groups and add up to 50 accounts per group.

4 The number in parenthesis next to the group name is how many accounts are in that group.

Add Accounts

Group Name: **Group One**

Select accounts to add to the group below.

Unassigned Accounts

Type to filter

Account Number	Account Type	Account Name	Available Balance
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Checking	Checking	\$0.00
<input type="checkbox"/>	Checking	Checking	-\$51,262.00
<input checked="" type="checkbox"/>	Savings	Savings	\$21,075,921.77

Viewing 1 - 3 of 3 accounts

My Dashboard

Accounts

4 **New Test Group (2)** Group available balance: **\$21,075,921.77**

Account Number	Account Name	Current Balance	Collected Balance	Available Balance
xxx5570	Checking	\$0.00	\$0.00	\$0.00
xxx8477	Savings	\$21,075,921.77	\$21,075,921.77	\$21,075,921.77

Group Two (0) Group available balance: **\$0.00**

No accounts assigned to this group. Click [Manage Groups](#) to delete, rename, or add accounts to this group.

Business Online Banking Dashboard

Viewing Accounts

The screenshot displays the INTRUST Bank Business Online Banking Dashboard. The top navigation bar includes links for Message Center, Cut-Off Times, Last Login (04/20/2021, 06:27 AM, CST), and user profile (Hi, jennifera). The main dashboard area is titled "My Dashboard" and features a "Accounts" widget with a "Manage Groups" button and "Expand All" / "Collapse All" options. The "Accounts" widget shows a "New Test Group (2)" with a "Group available balance: \$21,075,873.77". Below this is a table of accounts:

Account Number	Account Name	Current Balance	Collected Balance	Available Balance	Details
xxxx5570	Checking	\$0.00	\$115.00	\$115.00	Details
xxxx8477	Savings	\$21,075,921.77	\$21,075,758.77	\$21,075,758.77	Details

A red circle with the number "1" highlights the "Details" link for the xxx5570 account. A pop-up window titled "Checking Account xxx5570" is open, showing a summary of balances and a list of transactions. A red circle with the number "2" highlights the "View Account Transactions" button at the bottom of the pop-up.

Checking Account xxx5570

Current Balance	Collected Balance	Available Balance
\$0.00	\$115.00	\$115.00

Transactions - Last 10 days

Date	Check #	Description	Amount
04/19/2021		Transfer from Savings : Transfer SV x8477 to CH x5570 TMID:ee39dc8c-f5fa-4	\$10.00
04/19/2021		Transfer from Savings : Transfer SV x8477 to CH x5570 TMID:3ca5dbf5-8893-4	\$5.00
04/19/2021		Transfer from Savings : Transfer SV x8477 to CH x5570 TMID:4ee42d82-f535-4	\$100.00
Viewing 1 - 3 of 3 Results			\$115.00

View Account Transactions **Close**

In addition to seeing key balance information within the Accounts widget, you can drill further to view transaction information.

1 Click **Details** and a new window will pop up over the dashboard that provides recent transactions.

2 If you want to view more details, you can quickly navigate by clicking **View Account Transactions**. This takes you from the Dashboard to the Account List feature where you can complete further research.

Business Online Banking Dashboard

Customizing your Dashboard

The screenshots show the INTRUST Bank Business Online Banking Dashboard. The top screenshot shows the 'My Dashboard' with a 'Configure Dashboard' button (1). The bottom screenshot shows the dashboard with a 'Remove widget' button (4) and a 'Save' button (3). A 'New Test Group' table is visible in both. The bottom screenshot also shows a 'Resource' widget (7) and a 'You can change the position of this widget by dragging and dropping' message (5).

Account Number	Account Name	Current Balance	Collected Balance	Available Balance	Details
xxxx5570	Checking	\$0.00	\$115.00	\$115.00	Details
xxxx8477	Savings	\$21,075,921.77	\$21,075,758.77	\$21,075,758.77	Details

1 Click **Configure Dashboard**

2 A new view displays

3 Add widgets

4 Remove widgets

5 Position widgets by dragging and dropping

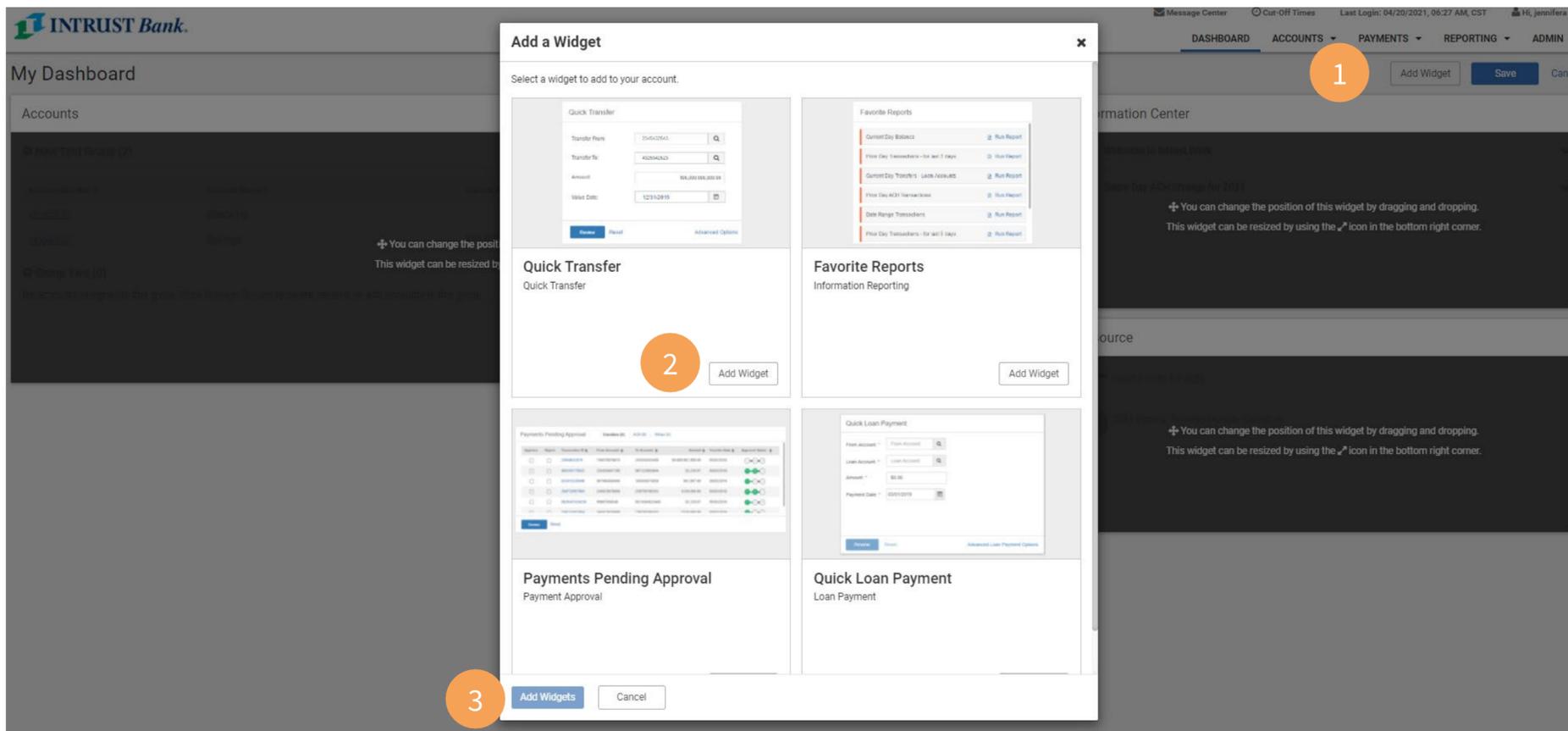
6 Resize widgets

As you resize and position the widgets, the dashboard will automatically show you how the changes impact widget arrangement.

7 Don't forget to click **Save** for your changes to take effect.

Business Online Banking Dashboard

Adding Widgets



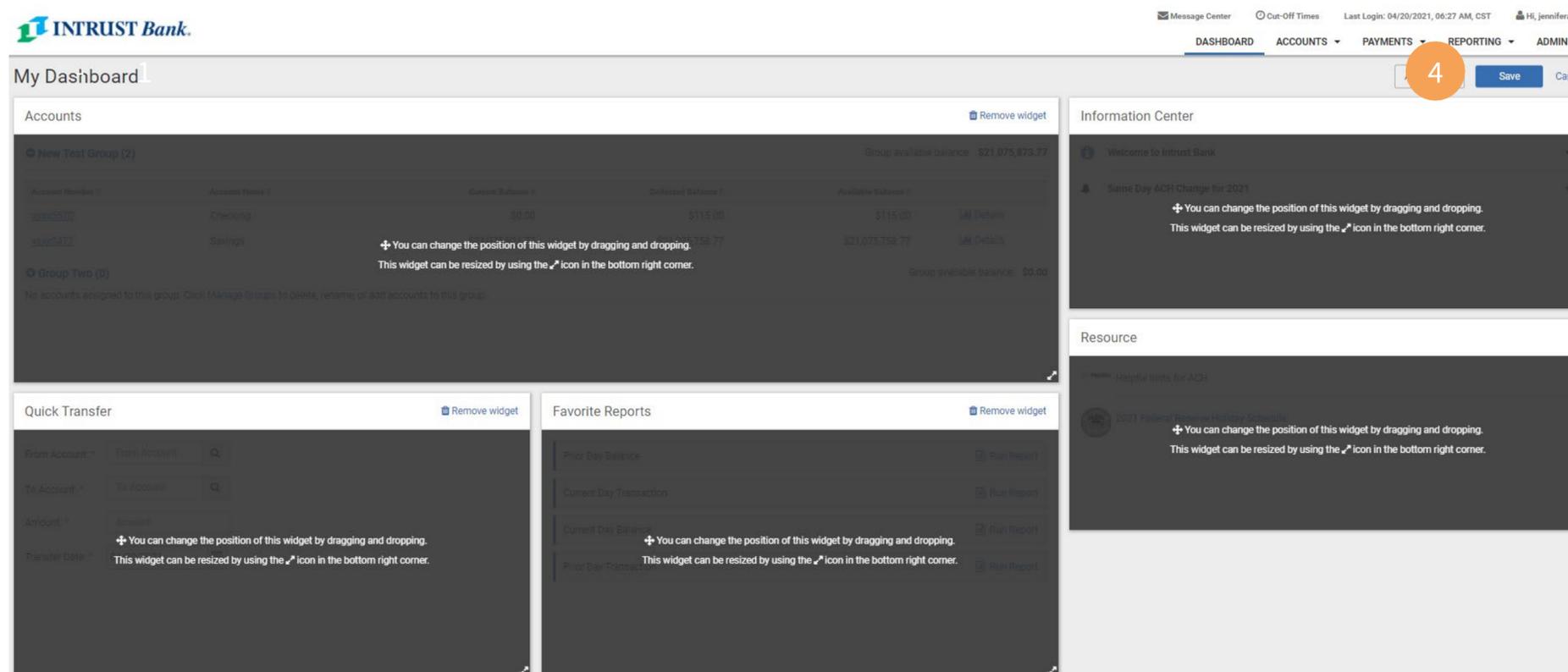
1 Click **Add Widget**

You will now be presented with the widgets available to you.

2 Click **Add Widget** for each one you wish to see on your dashboard.

3 Click **Add Widgets** and you will be presented with a layout that you can now adjust.

4 Don't forget to click **Save** for your changes to take effect.



Business Online Banking Dashboard

Your new Dashboard is now customized

Message Center | Cut-Off Times | Last Login: 04/20/2021, 06:27 AM, CST | Hi, jennifera
DASHBOARD | ACCOUNTS | PAYMENTS | REPORTING | ADMIN

My Dashboard

Configure Dashboard

Accounts

Manage Groups Expand All | Collapse All

New Test Group (2)

Group available balance: \$21,075,873.77

Account Number	Account Name	Current Balance	Collected Balance	Available Balance	
xxx5570	Checking	\$0.00	\$115.00	\$115.00	Details
xxx8477	Savings	\$21,075,921.77	\$21,075,758.77	\$21,075,758.77	Details

Group Two (0)

Group available balance: \$0.00

No accounts assigned to this group. Click [Manage Groups](#) to delete, rename, or add accounts to this group.

Account List

Information Center

- Welcome to Intrust Bank
- Same Day ACH Change for 2021

Resource

-  [Helpful hints for ACH](#)
-  [2021 Federal Reserve Holiday Schedule](#)

Quick Transfer

From Account:

To Account:

Amount:

Transfer Date:

[Advanced Transfer Options](#)

Favorite Reports

- Prior Day Balance
- Current Day Transaction
- Current Day Balance
- Prior Day Transaction