Dashboard

Quick Reference Guide

Business Online Banking Dashboard

INTRUST *Bank*

Message Center | Cu[...] | Last Login: 04/16/2021, 01:22 PM, 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: **$814,373.76**

Account Number ⇅	Account Name ⇅	Current Balance ⇅	Collected Balance ⇅	Available Balance ⇅	
80xxxxxxxxx0210	Checking	$749,326.10	$749,326.10	$749,326.10	ᴫ Details
80xxxxxxxxx0310	Checking	$65,047.66	$65,047.66	$65,047.66	ᴫ Details

Group available balance: $66,010,555.61

≡ Account List

Payments Pending Approval

Transfer (0) | Loan Payment (0) | **Wire (8)** | ACH (0)

☐	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 ○
☐	W000000091227	Domestic	2021	Beneficiary 2	USD	$13.00	04/16/2021	04/16/2021	Pending Approval

[Approve] [Reject] Reset

Positive Pay

Check Exceptions (4) | ACH Exceptions (0)

Pay	Return	Account	Check Number ⇅	Paid Amount ⇅	Issued Amount ⇅	Posted Date ⇅	Issued Date ⇅	Issued Payee ⇅	Exception Reason ⇅
●	○	2018	View Check 8090	$80.90	$80.90	04/15/2021	04/15/2021		Payee mismatch
○	●	2018	8091	$80.11	$80.91	04/15/2021	04/15/2021		Amount mismatch
○	●	2018	View Check 8092	$80.92	$80.92	04/15/2021	04/15/2021		Payee mismatch
○	●	2018	View Check 8093	$80.93	$80.93	04/15/2021	04/15/2021		Payee mismatch

Information Center

🔔 ACH Changes for 2021 ▾

ℹ Welcome to Intrust Bank ▾

Resource

Nacha Helpful Hints for ACH

2021 Federal Reserve Holiday Schedule

Quick Transfer

From Account: * [From Account] 🔍

To Account: * [To Account] 🔍

Amount: * [Amount]

Transfer Date: * [04/16/2021] 📅

[Review] Reset

Advanced Transfer Options

Favorite Reports

Prior Day Balance — 📄 Run Report

Current Day Transaction — 📄 Run Report
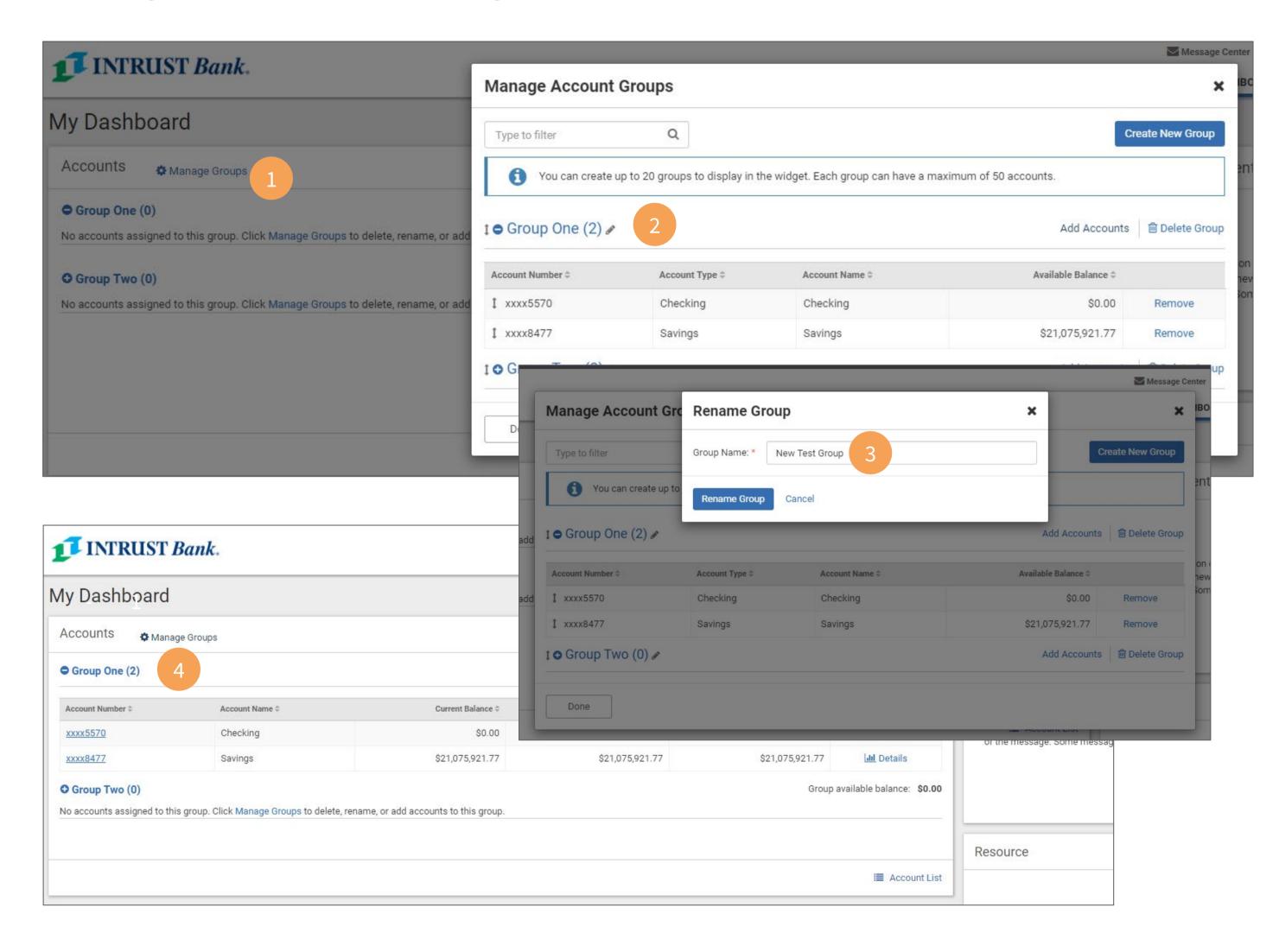
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1 Quick access to the Message Center where you can securely message INTRUST Treasury Services.

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.
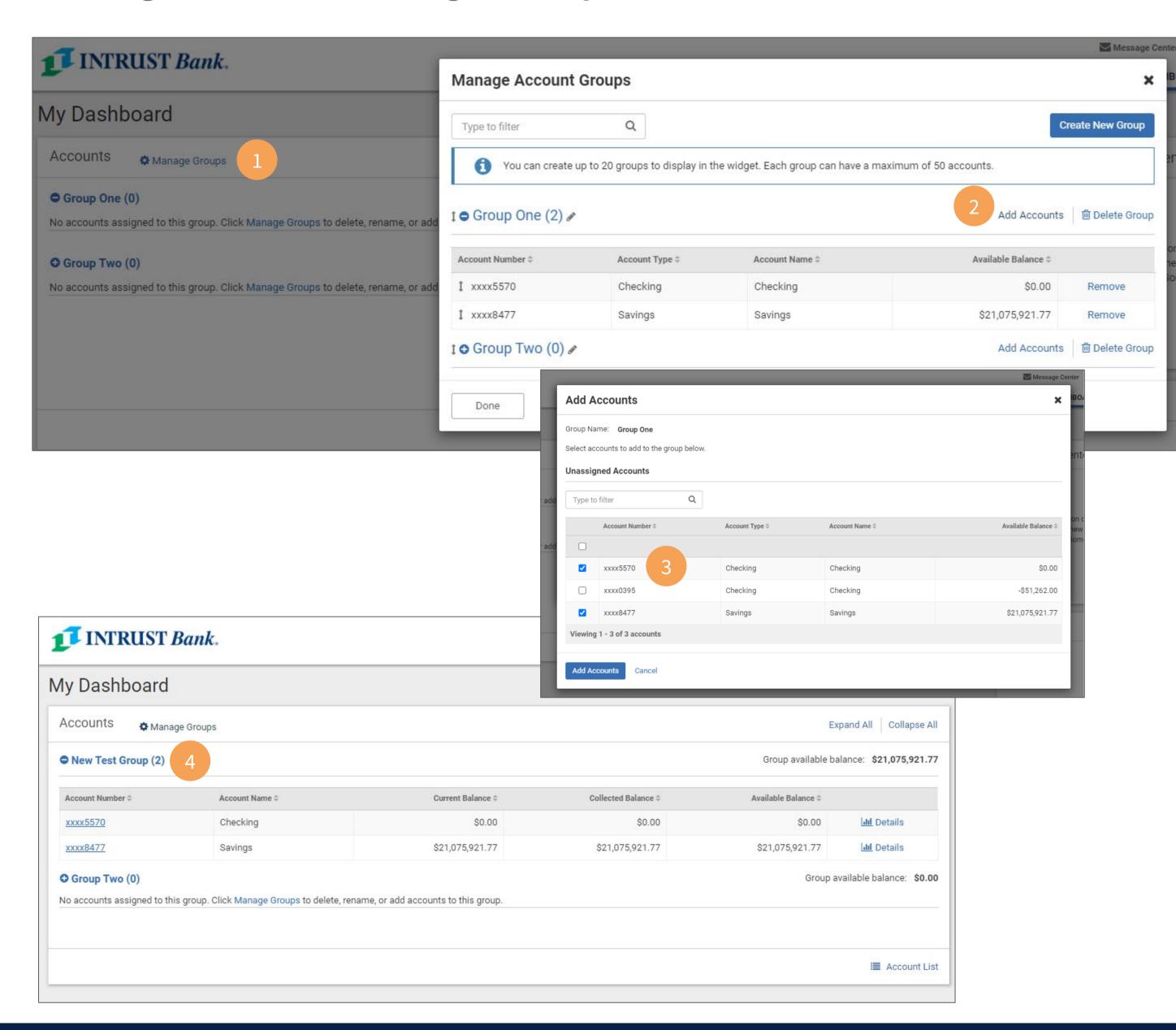
Manage the Accounts Widget

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
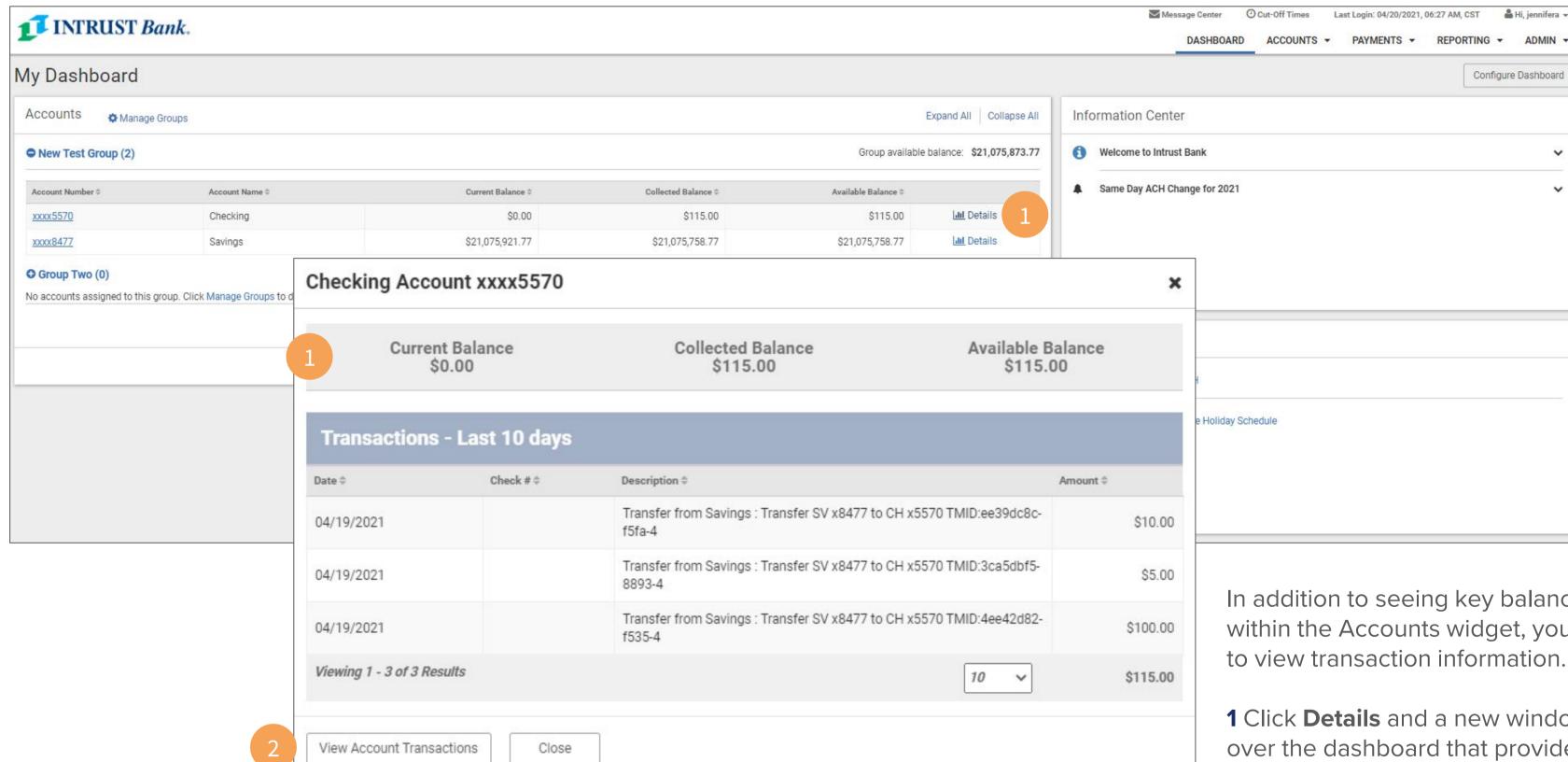
Naming the Accounts Widget Groups

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.

Viewing Accounts

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.
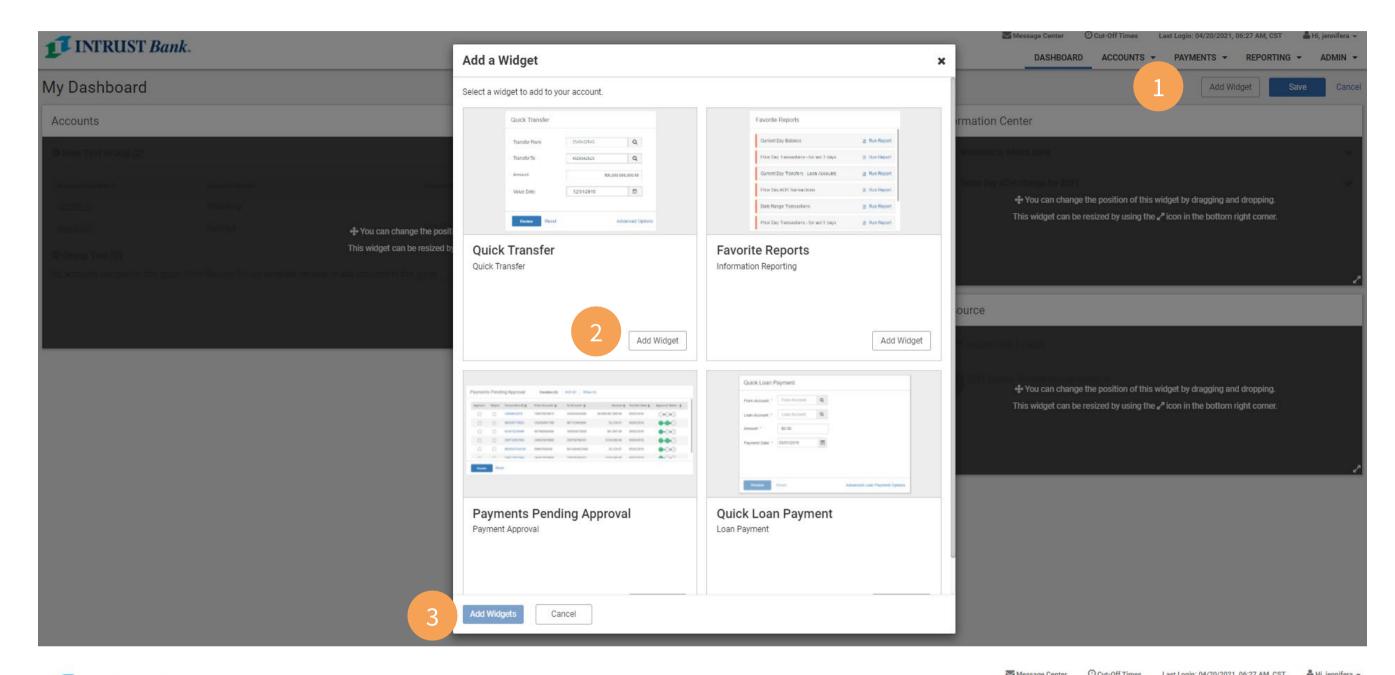
Business Online Banking Dashboard

Customizing your Dashboard

1 Click **Configure Dashboard**

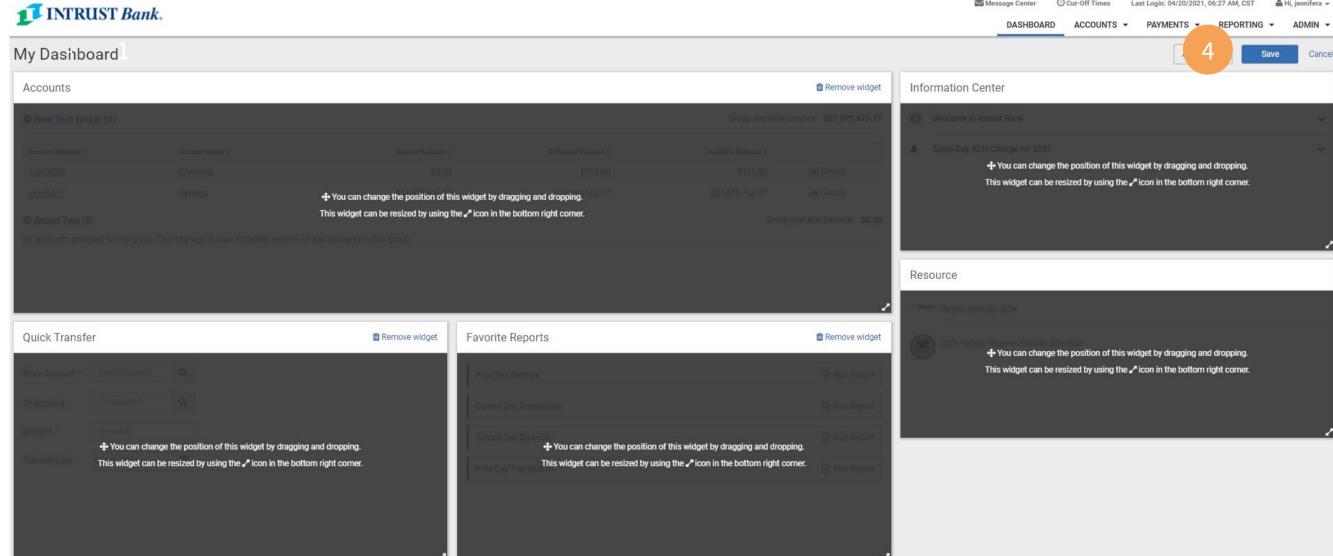**2** A new view displays

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.

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