

Corporate Services

Quick Reference Guide - Home (Dashboard)

Bangor
Savings Bank

You matter more.®

Member FDIC

The home page, also known as the Dashboard, is your landing page and prime real estate upon login. As a default, there are certain widgets pre-selected for your convenience and benefits. You may keep them on the home page, remove them, or add others via the Add Widget dropdown on the top header bar.

Pinned to the home page is the Notification widget. It delivers important communication from your financial institution to you and highlights actions requiring your focus. This is not removable nor resizable.

Home

Add Widget

MESSAGE OF THE DAY



Contact Us: Please contact via email at CorporateServicesSupport@bangor.com or [More](#)

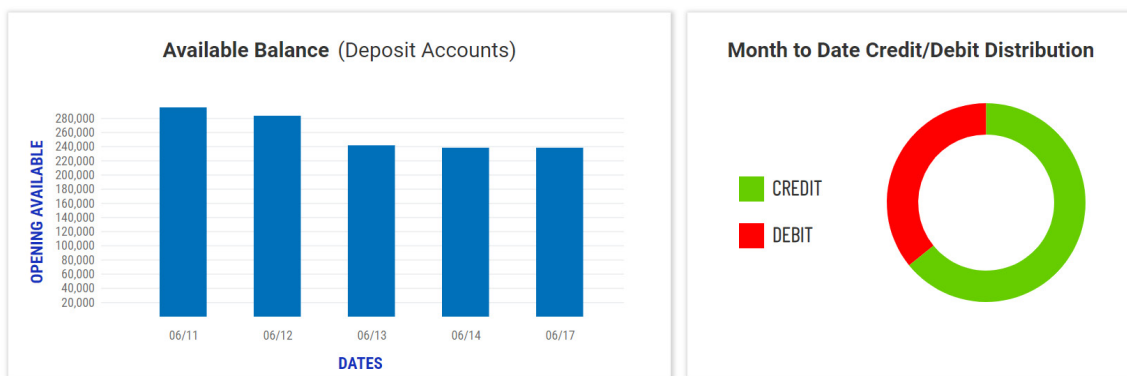
ACTION ITEMS

No Action Items!
You are all caught up!



When you have permissions to view any bank deposit accounts – such as checking and savings accounts, a Smart Chart widget is pre-selected for you. It offers a quick visual of key data regarding your deposit account information.

SMART CHART



When you have permissions to view any bank accounts, a checking or savings account or a loan account, you will also have an Account Summary widget on the home page. It provides 4 options to access your account information:

- ALL ACCOUNTS:** There are two formats: (1) a tabular, list view or (2) a tile view. If you have 20 or fewer accounts, the account summary defaults to the tile view. You have the option to toggle to list view using the icon that appears in the upper right corner of the widget.
- BALANCE HISTORY:** Provides summary account balances information for the accounts selected of a given date.

3. **ACCOUNT ACTIVITY:** Provides the convenience for you to save frequently utilized transaction search criteria for reuse.
4. **EXPORT:** Offers you the ability to export account balances and transaction information in multiple formats, accounts, and dates.

ACCOUNT SUMMARY



ALL ACCOUNTS CUSTOM REPORTING ACCOUNT ACTIVITY



You can also access the Transaction Search widget on the home page. It offers you the ability to quickly zoom in on transactions meeting certain criteria.

TRANSACTION SEARCH

Search Deposit Accounts

ACCOUNTS

DATE

TRANSACTION TYPE

AMOUNT Range

[Hide Additional Filters](#)

When you have permissions to transfer money between accounts (also known as Book Transfer), a Quick Transfer widget is offered on your home page. It offers you the ability to easily send a simple transfer.

QUICK TRANSFER



FROM ACCOUNT

TO ACCOUNT

TRANSFER DATE


AMOUNT


MEMO

Optional

0/80

Here is an example of the home page with default widgets:






Home


Add Widget ▼

MESSAGE OF THE DAY

 **Contact Us:** Please contact via email at CorporateServicesSupport@bangor.com or [More](#)


ACTION ITEMS

No Action Items!
You are all caught up!

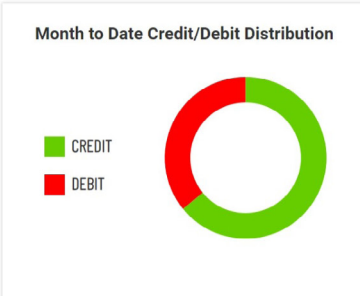


SMART CHART ⚙️

Available Balance (Deposit Accounts)



Month to Date Credit/Debit Distribution



ACCOUNT SUMMARY ⚙️

[ALL ACCOUNTS](#) [CUSTOM REPORTING](#) [ACCOUNT ACTIVITY](#)

▼ Deposit Accounts

☰
▶

TODAY'S OPENING LEDGER

CURRENT AVAILABLE

\$238,571.10
\$237,191.10

THESE BALANCES REFLECT ALL ACCOUNTS

ALL ACCOUNTS ▼

As of 06/17/2024 10:26 AM
🔍
🗑️
📄
⬇️
🔒

ACCOUNT NAME	ACCOUNT NUMBER	TODAY'S OPENING LEDGER	CURRENT AVAILABLE
MARKET RATE ACCOUNT		100,000.00	100,000.00
OPERATING ACCOUNT		133,189.98	131,809.98
PAYROLL ACCOUNT		5,381.12	5,381.12

VIEW 1-3 OF 3

DISPLAY All ▼

1

> Loan Accounts

CURRENT AVAILABLE

CURRENT PRINCIPAL

\$0.00
\$0.00

THESE BALANCES REFLECT ALL ACCOUNTS

TRANSACTION SEARCH ⚙️

Search Deposit Accounts

ACCOUNTS

Select
▼

DATE

06/14/2024
🗑️

CorporateServicesSupport@Bangor.com | 1.888.276.8723