Corporate Services

Quick Reference Guide - Home (Dashboard)

Bangor Savings Bank
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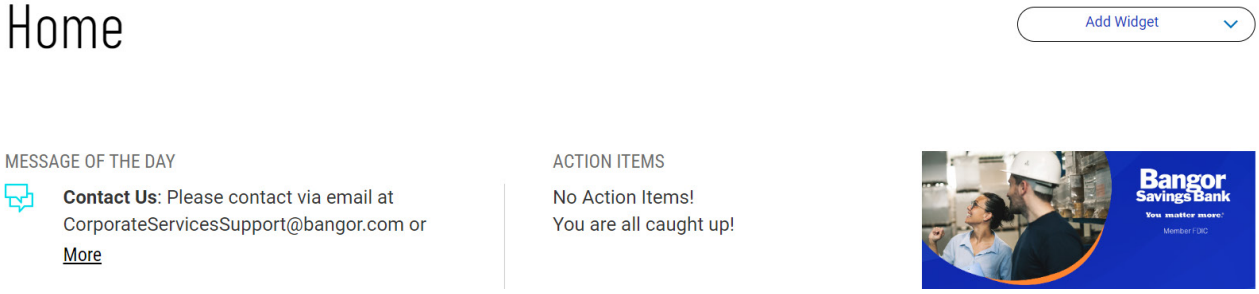
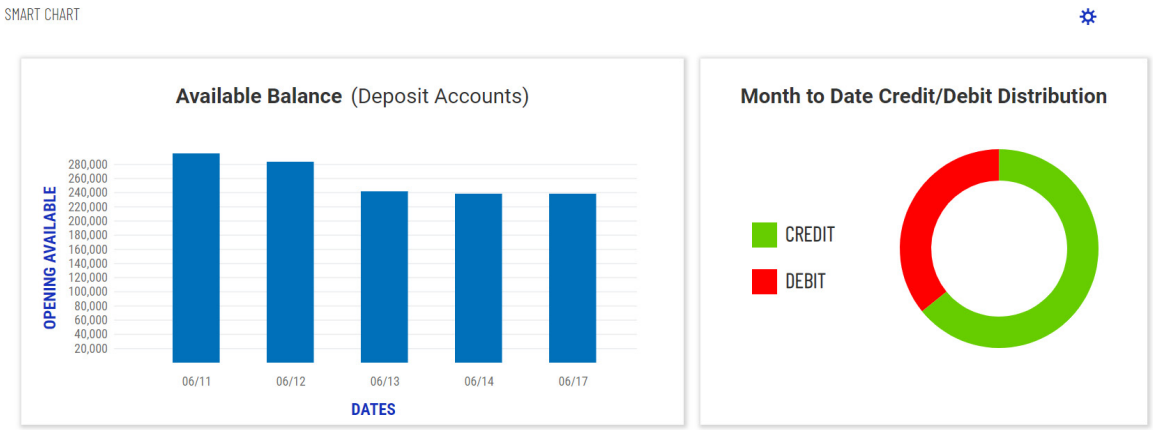
Member FDIC

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.



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.



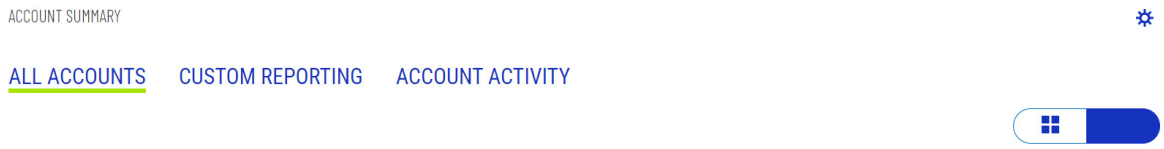
When you have permissions to view any bank accounts, a checking or savings account or a loan account, you will also have an Account Summary widget on the home page. It provides 4 options to access your account information:

1. 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.

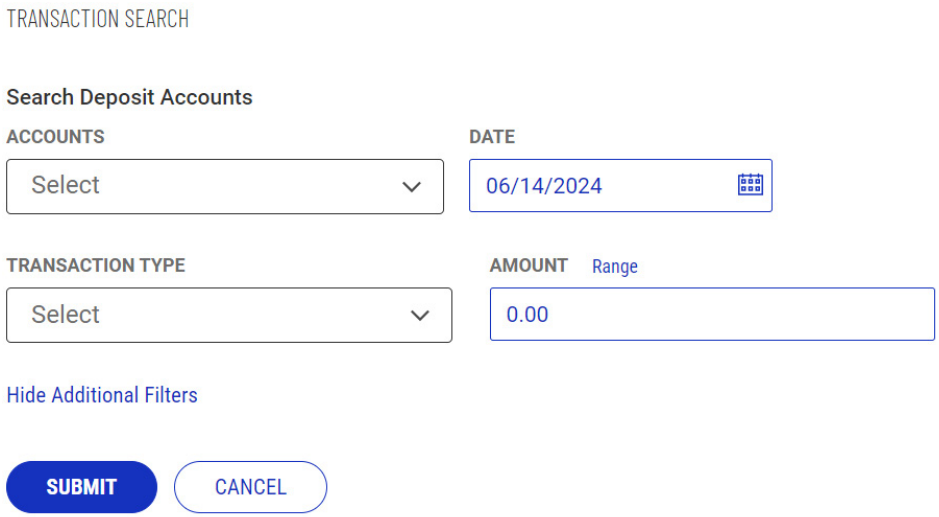
2. BALANCE HISTORY: Provides summary account balances information for the accounts selected of a given date.

3. ACCOUNT ACTIVITY: Provides the convenience for you to save frequently utilized transaction search criteria for reuse.

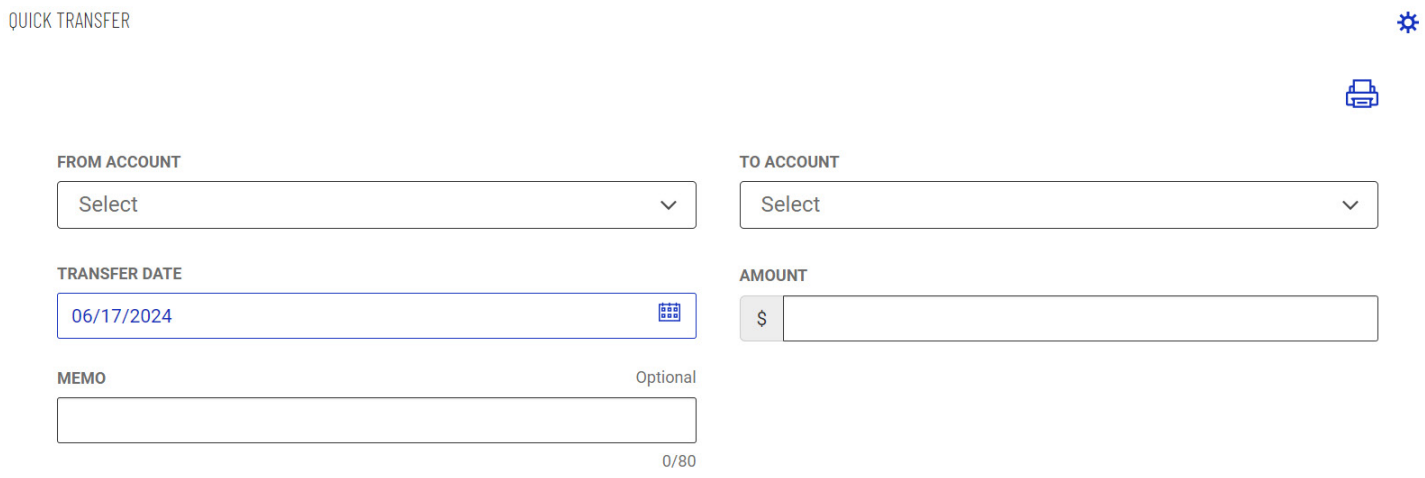
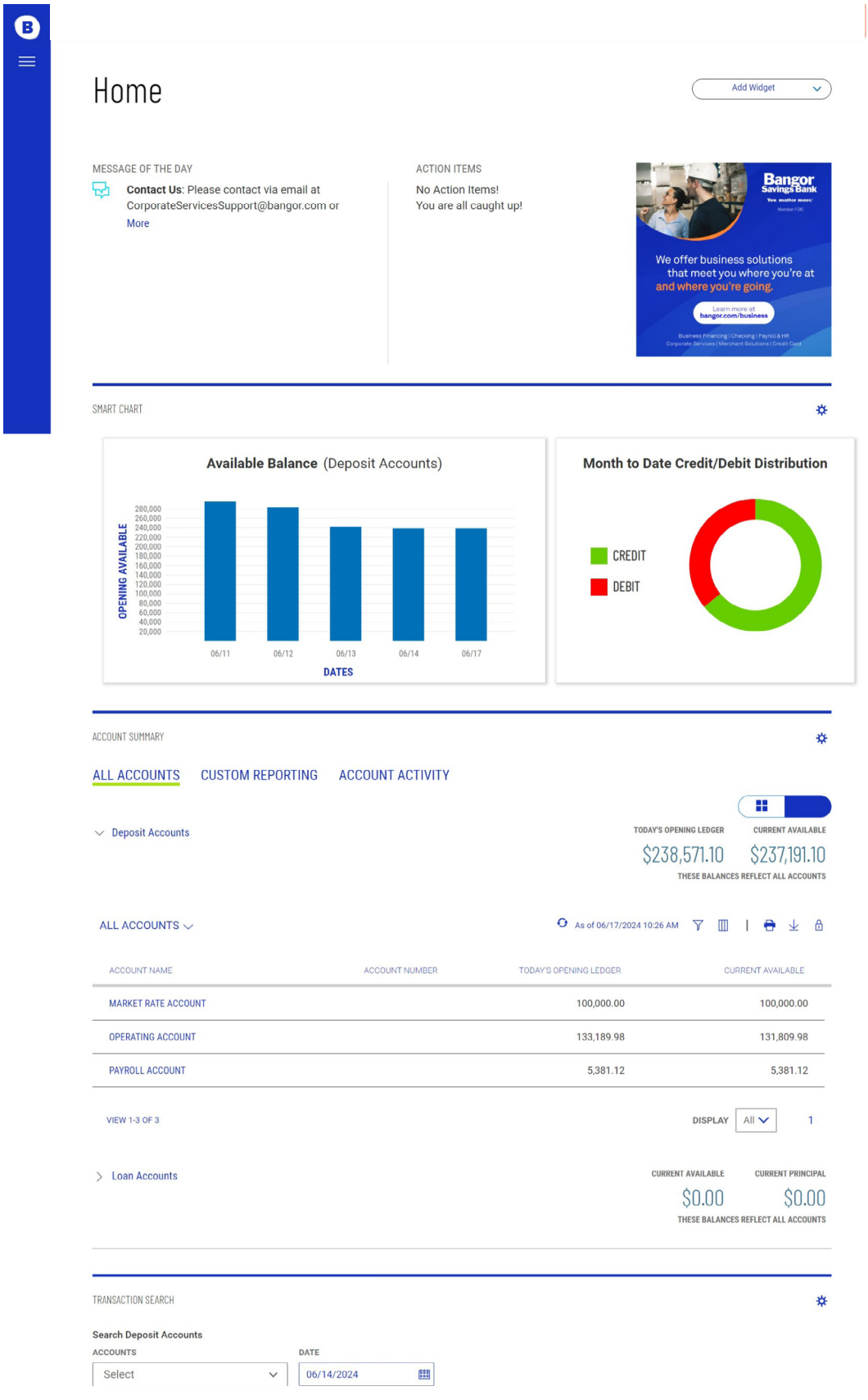
4. EXPORT: Offers you the ability to export account balances and transaction information in multiple formats, accounts, and dates.



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.



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.



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