

Overview

- View a listing of accounts.
- **Transfer Money Now** is a direct shortcut to transfer funds.
- **Commercial Transactions** is a direct shortcut to ACH and Wire origination.
- **Mobile Deposit History** displays a listing of checks submitted and accepted through Mobile Remote Deposit Capture.

NOTE: You must be enrolled in Mobile Remote Deposit Capture before this tab will appear on the home screen.

- Home page widgets: **Approvals Needed**, **Favorite Reports** and **Locked Logins** will appear depending on User entitlements.

NOTE: These can be managed under Home Page Preferences within the Settings Menu

- **Asset Summary** displays the asset and debt allocation for accounts.
- Select and drag an account to the envelope icon which appears at the bottom right side of the screen to create a new account group.

NOTE: Envelope will not appear until an account is selected to drag.

- The newly created group will appear below and can be renamed. Additional accounts may be dragged into the new group or additional groups created.

