

The Home Page in CentreSuite

You begin all tasks from this page. The home page is divided into sections which are numbered 1-5 in the example below. You can collapse the sections by clicking the up-arrow (▲) or expand them by clicking the down arrow (▼). Additional messages display when you click the Bank Messages icon (🏠). When you are finished performing tasks from the home page, click the log-out logo (🔌) in the upper-right corner of the page to exit the application.

Important: Depending on the access permissions assigned to you by your organization, some of these sections or the links within them may not be visible.

The screenshot shows the 'My Bank Logo' home page. At the top right, a user profile 'User' is shown with a power icon (🔌) and a dropdown menu (1) containing 'Edit Personal Information', 'Edit Password', 'Add Account', and 'Manage Alerts'. Below this is a navigation bar with tabs: HOME, STATEMENTS, ACCOUNTS, REPORTS, EXPENSES, ADMINISTRATION, and HELP. The main content area includes:

- Section 2: 'Corporate Messages 1' and 'Corporate Messages 2', each with a 'View' link.
- Section 3: 'View Account Details' card showing account information for 'User (12345****9876)' with a credit limit of \$5,000.00 and a last transaction of \$295.00 on 2/7/2013.
- Section 4: 'My Tasks' card with a collapse arrow (▲) and a list of tasks: 'Review Transactions to Report', 'Create Expense Report', 'In Progress (0)', 'Recently Approved (0)', and 'For Your Approval (0)'.
- Section 5: 'Quick Links' card with a collapse arrow (▲) and links for 'Create Out Of Pocket Transaction', 'Manage Accounts', 'Maintain User Information', and 'Output Log'.



User (drop down list) – 1

The User drop down as illustrated above will display your user name. Clicking the down arrow (▼) next to your user name displays a drop-down list. This list contains commonly performed tasks related to user maintenance.

- **Edit Personal Information** – Clicking this link displays the Edit Personal Information page. You maintain or edit your personal information like your name and email address here.
- **Edit Password** – Clicking this link displays the Edit Password page. You change your password and provide a password hint here.
- **Add Account** – Clicking this link displays the Add Account page. Administrators add accounts on this page. All accounts that are currently assigned to an administrator are also displayed.
- **Manage Alerts** – Clicking this link displays the Manage Alerts page. You subscribe to alerts on this page.

Messages – 2

Your corporate messages display here. Click **View** to expand the list. You then click on a message to view it.

- New Message Icons on the top right side of the screen:
 - Users will also see new options to view messages posted by either their financial institution or their organization. Two new icons will display next to the logout icon. The building icon () represents bank level messages and the envelope icon () represents organization level messages.
 - High priority messages will display as a popup the first time the user logs into the system. The popup will only display once and then users can access the message via the home page. All other messages can be accessed via the new icons as noted above.

View Account Details – 3

The View Account Details section lists the following information about your account. If you have multiple accounts assigned to you, select one from the **Select An Account** list and the information about that account will update in the View Account Details section.

- Credit Limit
- Last Transaction Posted
- Transaction to Report
- Unattached Transactions
- Account Action(s)

Click **View Last Statement** to display a portable document format (PDF) version of your last statement.

My Tasks – 4

The My Tasks section contains the links below. Click these links to access the following pages. *Please note you will only see these options if permissions are granted by your organization.*

- **Review Transactions to Report** – Clicking this link displays the Manage Expense Reports page with the Unattached Transactions tab selected. You search for unattached transactions here.
- **You have unattached transactions to report** – Clicking this link displays the Search for Transactions page with the Search for Transactions tab selected.
- **Create Expense Report** – Clicking this link displays the Create Expense Report page with Step 1: Define General Report Information displayed. You create a new expense report from here.
- **In Progress** – Clicking this link displays the Manage Expense Reports page with the Expense Reports tab selected and the In Progress section expanded. All your expense reports with an In Progress status are listed.
- **Recently Approved** - Clicking this link displays the Manage Expense Reports page with the Expense Reports tab selected and the Recently Approved section expanded. All your expense reports with a Recently Approved status are listed.
- **For Your Approval** - Clicking this link displays the Manage Expense Reports page with the Expense Reports tab selected and the For Your Approval section expanded. All your expense reports with a For Your Approval status are listed.
- **Unassigned** – Clicking this link displays the Manage Expense Reports page with the Expense Reports tab selected and the Unassigned section expanded. All your expense reports with an Unassigned status are listed.

Quick Links – 5

The Quick Links section contains links to commonly performed tasks. Click these links to access the following pages. Depending on the access permissions assigned to you by your organization, some of these links may not be visible.

- **Create Out Of Pocket Transaction** – Clicking this link displays the Create Out-of-Pocket page. You create an out of pocket transaction here.
- **Manage Accounts** – Clicking this link displays the Manage Accounts Search page with all your accounts or accounts assigned to you listed. You access the Account Maintenance page for a selected account here.
- **Maintain User Information** – Clicking this link displays the Search for Users page. You search for users and manage their accounts on this page.
- **Maintain Messages** – Clicking this link displays the Search For Site page. You search for a site and then maintain messages for that site. For Organization Administrators only.
- **Output Log** – Clicking this link displays the Output Log page. You search for events such as mapper, export, and report outputs here.

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