



Widgets Matrix

Widget Name	Menu / Selection	Function
Accounts	Reporting	The Accounts widget lists the balances of the accounts that you have permission to see and lets you make transfers from one business account to another.
Address Book	Payments & Transfers	The Address Book allows you to add, modify, view, and delete payment beneficiaries.
Audit Information	Add Widget Picklist	The Audit Information widget allows you to search for audit records for data that was added or modified.
Check Issue Management	Fraud & Risk Management / Positive Pay	The Check Issue Management widget displays all check issues and voids created in the system. It also allows you to add check issue/voids, cancel stops, and place stops.
Download	Reporting	The Download widget allows you to download balance and transaction data in BAI, CSV, Quicken, or QuickBooks (OFX) format.
Employees	Payments & Transfers	Allows you to create employee related payments: payroll, expense reimbursement and child support.
Payments	Payments & Transfers	The Payments List View widget allows you to create and manage payments.
Positive Pay	Fraud & Risk Management	The Positive widget displays all check transactions that the bank identifies as suspect, as well as allowing you to view a decision history for each of them.
Recurring Payment Exceptions	Add Widget Picklist	The Recurring Payment Exceptions widget displays exceptions that occurred during the creation of recurring (scheduled) payments.
Reports Management	Reporting / Accounts	The Report Management widget shows a list of all reports you have access to.
Simple Entry	Add Widget Picklist	The Simple Entry widget lets you complete a quick simple account to account transfer.
Stop Payments	Fraud & Risk Management	The Stop Payments widget shows stop payments and cancel stop payments.
Transfers	Payments & Transfers	Transfers widget allows you to create account to account transfers.

Note: Widgets will default display if the user is permissioned to the service. "Add Widget Picklist" means the widget is not in a specified default location. It can be selected from the picklist and added to any workspace.

