Frost BUSINESS CONNECT

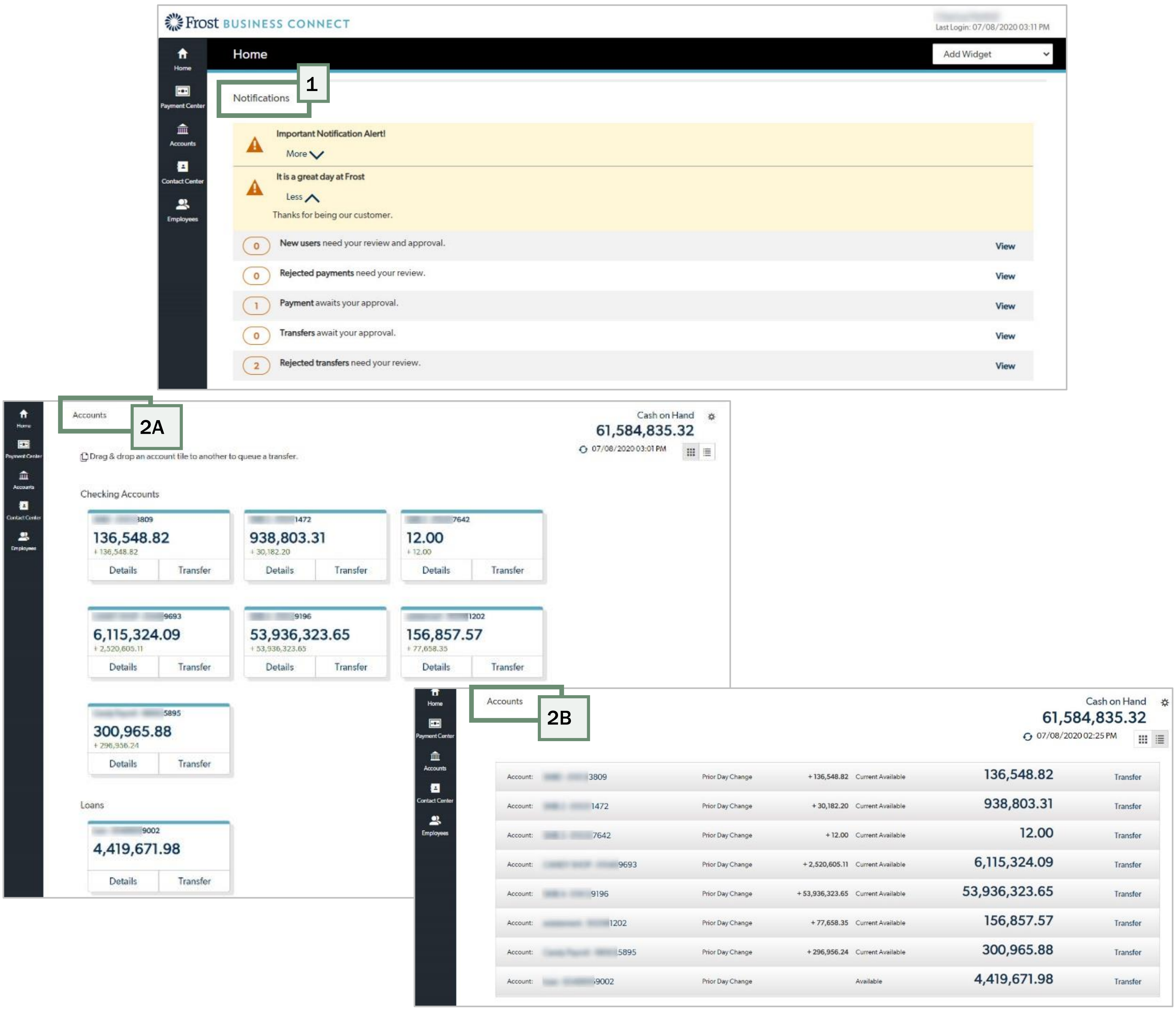
BASIC NAVIGATION

HOME PAGE

The Home page is the first page you see after signing on to Business Connect. This page will automatically provide:

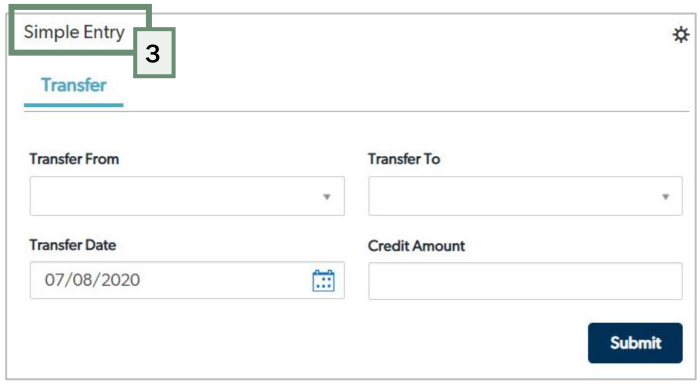
1. Notifications – Important messages and/or alerts, as well as required actions, such as approving a transaction.
2. Accounts - Two view options are available:
   A. The Tile View is the default view with a simple drag and drop feature to initiate transfers. You can also click **Transfer**.
   B. The List View option displays accounts in a list.

NOTE: Toggle between views with the selector in the top right corner of **Accounts**.



3. Simple Entry – Allows a quick and easy way to transfer funds between your Frost accounts.

NOTE: Menu options vary based on your permissions.



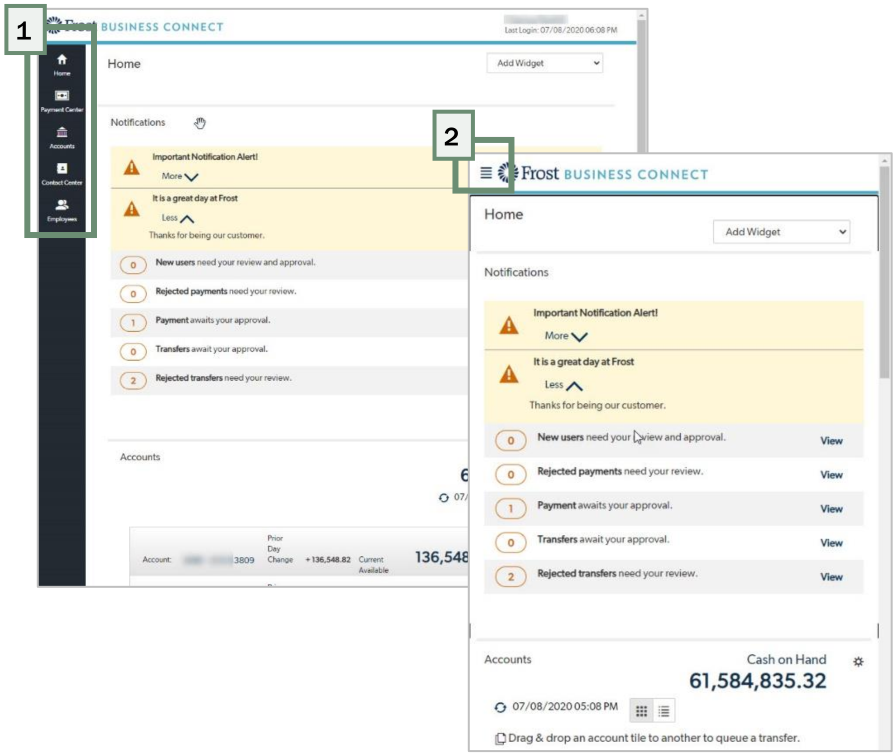
HOME PAGE MENU BAR

FUNCTIONALITY	DESCRIPTION
Home	The Home tab provides access to the Landing or Home page, where your customized set of Widgets appear.
Payment Center	The Payment Center tab provides access to perform and send payments to beneficiaries (payees) in the Contact Center. You can also view, edit, modify or approve all payment types (ACH, Wires, Collections or Tax Payments).
Accounts	The Accounts tab allows you to view balances, account details and make transfers from one account to another.
Contact Center	The Contact Center tab provides access to beneficiaries (payees) and allows you to add, modify, view and delete beneficiaries so that they can be used when creating payments in the Payment Center.
Employees	The Employees tab allows you to manage current employees and send expense reimbursements, payroll payments or child support.
Fraud	The Fraud tab provides visibility into the status of all issued checks, controls against the threat of check fraud and displays all accounts enabled for Positive Pay. Based on the details of the suspect items, you can decide which items to pay or return.
Administration & Settings	The Administration & Settings tab provides access to users and role maintenance, historical records of file importation and administrative features of the application.
Other Services	The Other Services tab provides access to SSO (single sign-on) links to other systems, including Remote Deposit Capture and iPay.

DYNAMIC DEVICE NAVIGATION (TABLETS, MOBILE DEVICE, ETC)

The page layout varies based on the device being used.

1. Tablet – The menu appears vertically on the side.
2. Mobile phone – The button on top left must be clicked to access drop-down menu.



WIDGETS

Personalize your banking experience using Widgets. Options can be added to your pages, allowing you to perform common tasks quickly. **NOTE:** Available options depend on your permissions.

ADD A WIDGET

1. On any page, click **Add Widgets**.
2. Select the desired Widget from the dropdown list.

NOTE: Newly added Widgets appear at the bottom of the menu.

MOVE A WIDGET

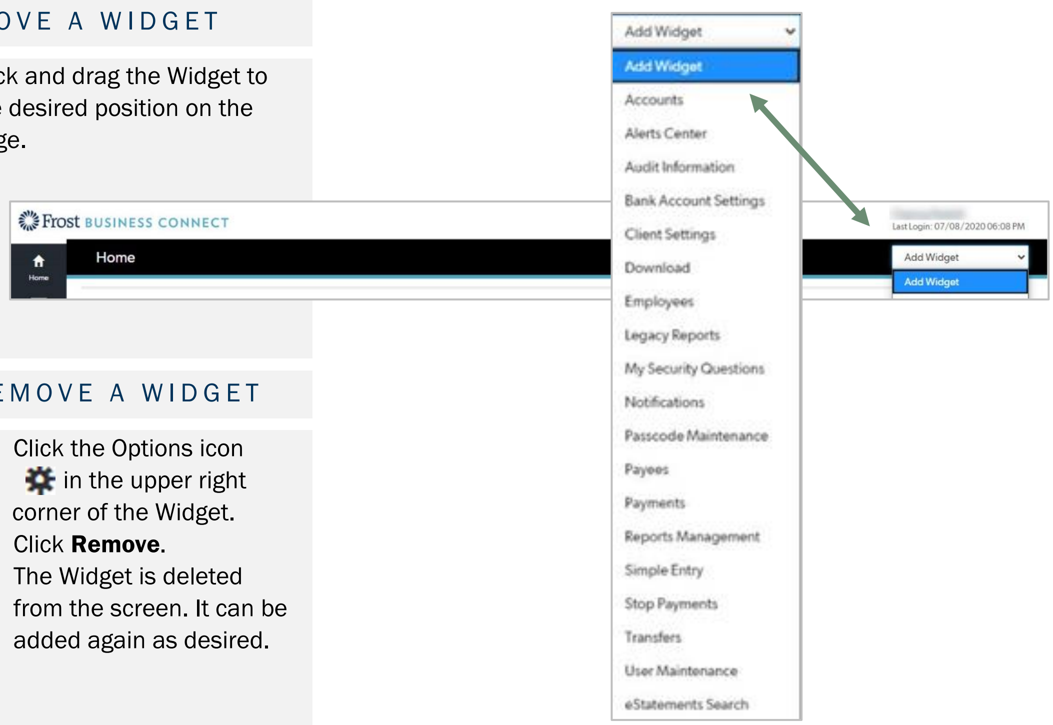
Click and drag the Widget to the desired position on the page.

RESIZE A WIDGET

1. Click the Options icon in the upper right corner of the Widget.
2. Click **Resize**.
3. Will resize to only use half the width of the screen.
4. To return the Widget to its original size, repeat Steps 1 and 2.

REMOVE A WIDGET

1. Click the Options icon in the upper right corner of the Widget.
2. Click **Remove**.
3. The Widget is deleted from the screen. It can be added again as desired.



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PREDEFINED VIEWS

Many lists have several predefined views that display records meeting specific criteria.

Example: The Payments Center has a predefined view option named **Approved Payments** that you can select which shows all payments that have been approved.

1. Set up Filter Views
   a. Use the filter drop-down menu to select the desired filtered view.
   b. Click on the name of the filtered view in the drop down list.
   c. The Transfers Widget will update and display the selected filtered view.

NOTE: To set a filtered view as a default, simply click the **Set as Default** button.

2. Adding Columns
   a. Click the options icon ⚙ in the upper right corner.
   b. Click on the desired column name to add or remove from your header view.
   c. Click **Update**.

3. Moving Column Position
   a. Hover over the left corner of a column until the filtered box displays 6 dots.
   b. Click and drag the column to a new position on the filtered column heading.