



# EAST WEST BANK

*business*Bridge® Premier  
Business Online Banking  
User Guide

Dashboard and Customizing Widgets

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## Dashboard

The dashboard provides you a quick overview of your account balances and quick access to your important functions. This area is customizable to ensure your most critical information is just a click away.

Displayed options may vary depending on your company's enrolled services and individual user's access.

The screenshot shows the businessBridge Premier dashboard interface. At the top, there is a header bar with 'Last Login: 07/11/2019 - 11:43 (Pacific Daylight Time)', 'Alerts 21', 'Approvals 0', and a 'Log Off' button. Below the header is a navigation menu with 'DASHBOARD', 'ACCOUNTS', 'PAYMENTS', 'TRANSFERS', 'CHECK SERVICES', 'REPORTS', 'ADMINISTRATION', and 'OTHER SERVICES'. The main content area is divided into several sections: 'ACCOUNT BALANCES' (a table with 5 rows of account data), 'BALANCES CHART' (a donut chart showing account distribution), 'QUICK TRANSFER' (a form for transferring funds), 'SPECIAL REPORTS' (a table of reports), and 'SHORTCUTS' (a list of quick actions). Annotations with arrows point to various features: 'Notifications of new activity, pending actions, and reminders' points to the Alerts and Approvals counts; 'As best practice, remember to log off after your session' points to the Log Off button; 'Manage your alert settings & change default landing page' points to the 'Manage Widgets' button; 'Add and remove a Widget' points to the '+ Manage Widgets' button; 'Setup your preferences for the widget' points to the gear icon on the BALANCES CHART; and 'Click on a widget and begin to drag and drop the widget into other positions on the screen.' points to the drag handle icon on the SHORTCUTS section.

Notifications of new activity, pending actions, and reminders

As best practice, remember to log off after your session

Manage your alert settings & change default landing page

Add and remove a Widget

Setup your preferences for the widget

Click on a widget and begin to drag and drop the widget into other positions on the screen.

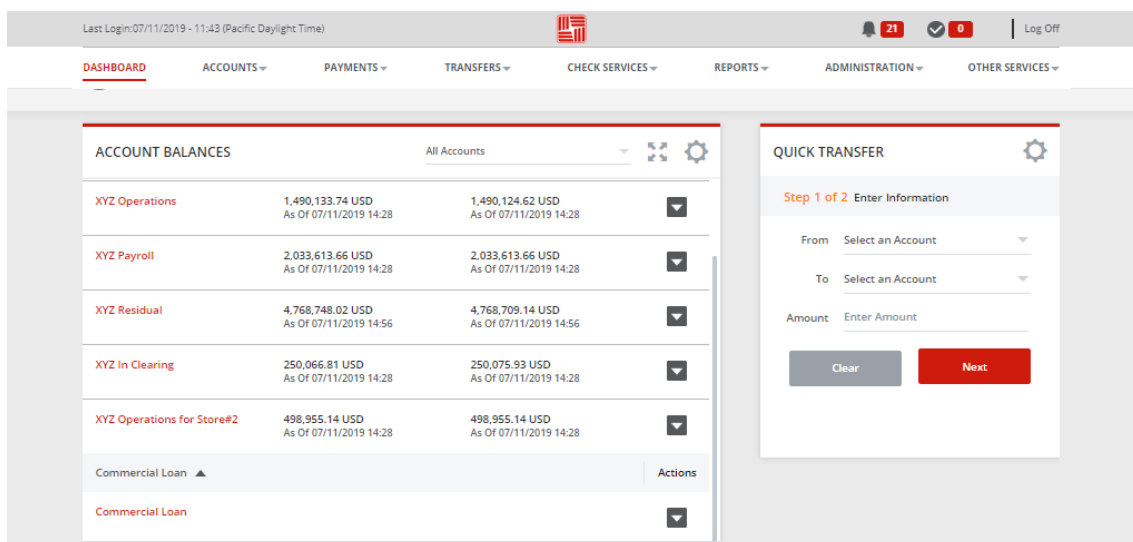
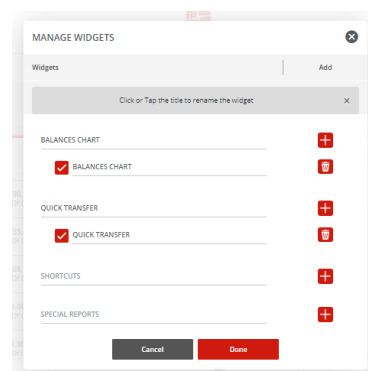
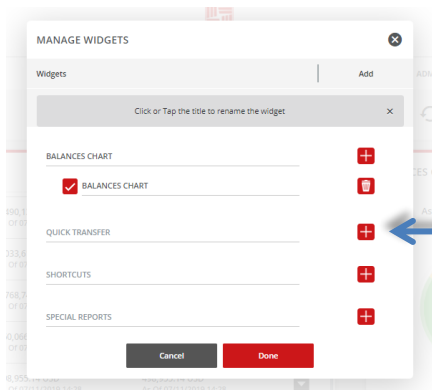
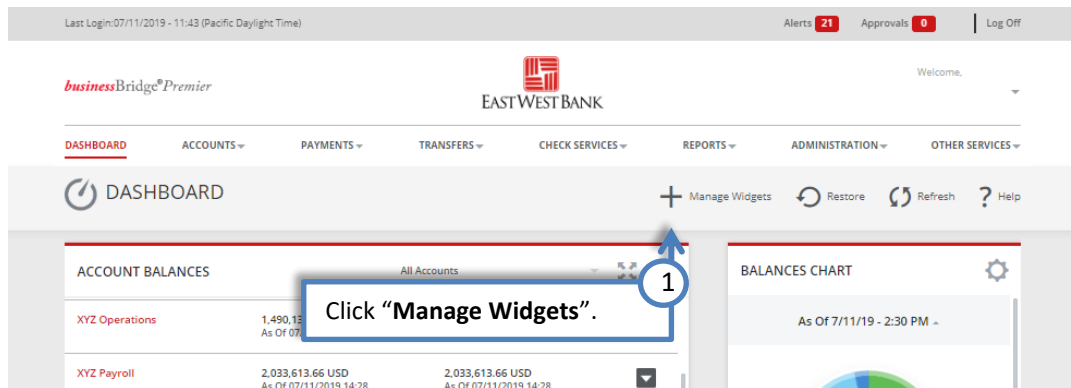
Account Name	Balance 1	Balance 2
XYZ Operations	1,490,133.74 USD As Of 07/11/2019 14:28	1,490,124.62 USD As Of 07/11/2019 14:28
XYZ Payroll	2,033,613.66 USD As Of 07/11/2019 14:28	2,033,613.66 USD As Of 07/11/2019 14:28
XYZ Residual	4,768,748.02 USD As Of 07/11/2019 14:28	4,768,709.14 USD As Of 07/11/2019 14:28
XYZ In Clearing	250,066.81 USD As Of 07/11/2019 14:28	250,075.93 USD As Of 07/11/2019 14:28
XYZ Operations for Store#2	498,955.14 USD As Of 07/11/2019 14:28	498,955.14 USD As Of 07/11/2019 14:28

Account Name	Percentage
XYZ Oper...	84.16%
XYZ Oper...	3.17%
XYZ Payroll	9.50%
XYZ Resi...	3.17%

Report Name	Date / Time
Inclearing Report	06/17/2019 16:40
Trade Incoming Collections Outstanding Report	04/01/2019 10:51

Create Payment	>
Create Transfer	>
Manage Stop Payments	>
Manage Users	>

## Adding a Widget



## Customizing your Account Balances Widget

Create “account groupings” to quickly review a subset of accounts together.

Click “ ” to edit your preferences.

Click “Edit Settings” to edit your preferences.

ACCOUNT BALANCE			
XYZ Operations	1,490,133.74 USD As Of 07/11/2019 14:28	1,490,124.62 USD As Of 07/11/2019 14:28	
XYZ Payroll	2,033,613.66 USD As Of 07/11/2019 14:28	2,033,613.66 USD As Of 07/11/2019 14:28	
XYZ Residual	4,768,748.02 USD As Of 07/11/2019 14:56	4,768,709.14 USD As Of 07/11/2019 14:28	
XYZ In Clearing	250,066.81 USD As Of 07/11/2019 14:28	250,075.93 USD As Of 07/11/2019 14:28	
XYZ Operations for Store#2	498,955.14 USD As Of 07/11/2019 14:28	498,955.14 USD As Of 07/11/2019 14:28	
Commercial Loan			Actions
Commercial Loan			

EDIT ACCOUNT SETTINGS

Account View Name | Default View | Account Display

Set All

All Accounts

Account Nickname

Cancel Done Create View

Click “Create View” to edit your preferences.

CREATE ACCOUNT VIEW

Step 1 of 2 Create Account View

Account View Name \* Operating Accounts Only

Cancel Next

Enter account grouping title.

Click “Next”.

CREATE ACCOUNT VIEW

Available Accounts

Select checkboxes to move items to Your Selections.

Your Selections

To remove items, deselect the checkbox.

LOAN

DEPOSIT

Accounts

<input type="checkbox"/>	XYZ In Clearing	8880008011	USD
<input checked="" type="checkbox"/>	XYZ Operations	8880008001	USD
<input checked="" type="checkbox"/>	XYZ Operations for Store#2	8880008016	USD
<input type="checkbox"/>	XYZ Payroll	8880008002	USD

Selected Accounts

<input checked="" type="checkbox"/>	XYZ Operations
<input checked="" type="checkbox"/>	XYZ Operations for Store#2

Cancel

Back

Done

6

Select the accounts you would like to see together.

7

Click "Done".

EDIT ACCOUNT SETTINGS

Account View Name

Default View

Account Display

Set All

All Accounts

☒

Account Nickname

Operations

☐

Account Nickname

Cancel

Done

Create View

8

Click "Done".

businessBridge® Premier



Welcome,

**DASHBOARD**

ACCOUNTS ▾

PAYMENTS ▾

TRANSFERS ▾

CHECK SERVICES ▾

REPORTS ▾

ADMINISTRATION ▾

OTHER SERVICES ▾

## DASHBOARD

+ Manage Widgets

Restore

Refresh

Help

## ACCOUNT BALANCES

Checking ▲

Ledger Balance ▲

XYZ Operations

1,490,133.74 USD  
As Of 07/11/2019 17:48

XYZ Operations for Store#2

498,955.14 USD  
As Of 07/11/2019 17:48

Operations

All Accounts

Operations ✓

Actions



## QUICK TRANSFER

Step 1 of 2 Enter Information

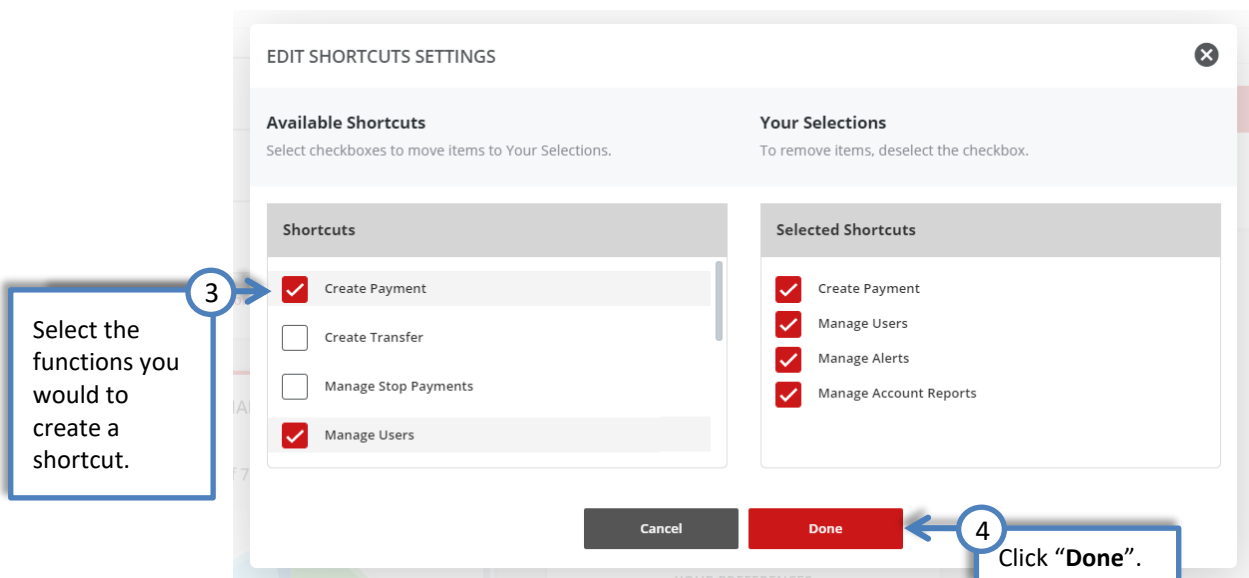
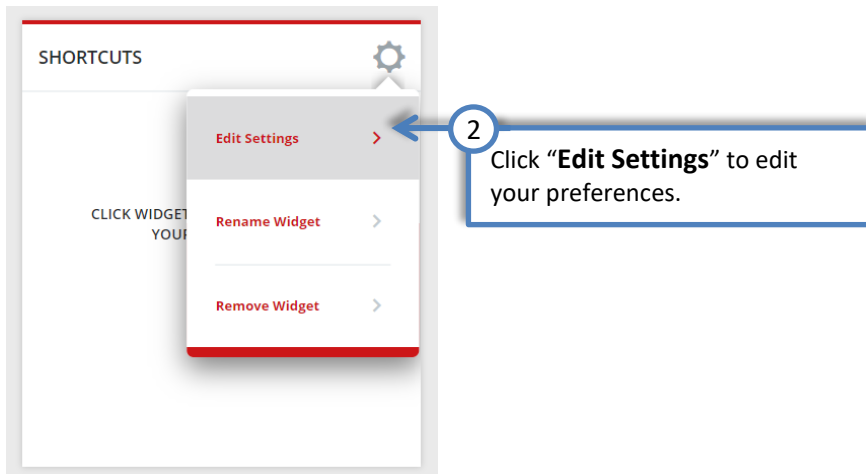
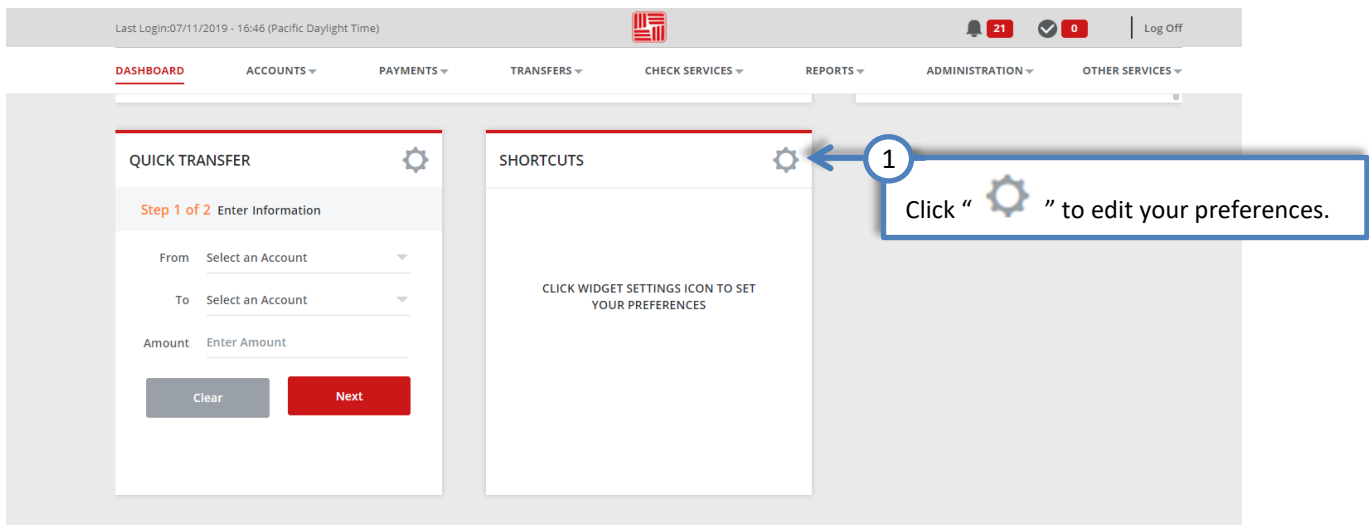
From To Amount 

Clear

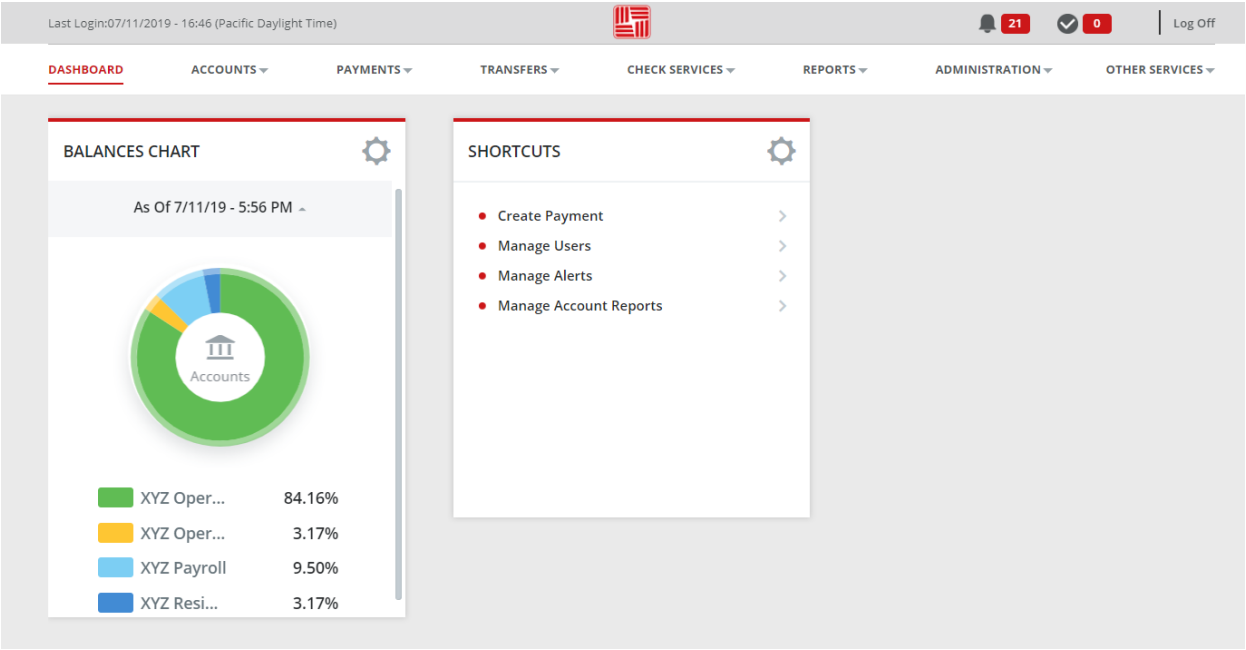
Next

## Customizing your Shortcuts Widget

Quickly access your most used links within the system by adding them into this widget.







## Create a Quick Transfer

Quickly enter a transfer from the dashboard. Be sure to check on the status of the transfer in the Transfer.

**QUICK TRANSFER**

Step 1 of 2 Enter Information

From 8880008001 - XYZ Operations - ...

To 8880008004 - XYZ Residual - 476...

Amount 8,500.00

Clear Next

1 Select the account you are transferring **"From"** and **"To"**.

2 Enter the amount you would like to transfer.

3 Click **"Next"**.

**QUICK TRANSFER**

Step 2 of 2 Preview

From 8880008001 - XYZ Operations - 1490124.62

To 8880008004 - XYZ Residual - 4768709.14

Amount 8,500.00 USD

Back Done

4 Click **"Done"**.

**QUICK TRANSFER**

Successful Submit  
Transfer created successfully.

From Select an Account

To Select an Account

Amount Enter Amount

Clear Next

Last Login: 07/11/2019 - 16:46 (Pacific Daylight Time) Alerts 21 Approvals 0 Log Off

businessBridge® Premier EASTWEST BANK Welcome,

DASHBOARD ACCOUNTS PAYMENTS **TRANSFERS** CHECK SERVICES REPORTS ADMINISTRATION OTHER SERVICES

DA TRANSFERS Edit ? Help

MANAGE

- Transfer Center
- Transfer Template Center

CREATE TRANSFERS

TRANSFER TOOLS

CREATE TEMPLATES

- One to Many
- Many to One

5 Click **"Transfer Center"**. To confirm the transaction is completed.

Last Login: 07/11/2019 - 16:46 (Pacific Daylight Time)

Alerts 21 Approvals 0 Log Off

DASHBOARDACCOUNTSPAYMENTSTRANSFERSCHECK SERVICESREPORTSADMINISTRATIONOTHER SERVICES

TRANSFER CENTER

View transfer activity and perform various transfer tasks including creating a new transfer.

Create TransferPrintHelp

MANAGE TRANSFERS

ALLPENDING

From07/11/2019To08/10/2019Transaction NumberEnter Transaction NumberStatusAll Statuses

Search

ADVANCED SEARCH

	Date	Transaction No.	From Account Account ID	To Account Account ID	Status	Frequency	Amount
VIEW PROCESSED							
<input type="checkbox"/>	07/11/2019	25UEZTJL6Z	XYZ Operations 8880008001	XYZ Residual 8880008004	Completed	One Time Only	8,500.00 USD

Show / Hide ColumnsShow 10

Reject

Delete

Approve

The cutoff time for same day transfer is 7:00 PM PT. Loan balances reflect the principal balance which is not your payoff balance. For payoff, please call (626) 371-8700, Option 2, 3. If you choose to schedule a transfer on a non-business day, system will update the transfer instruction to the next business day.

Additional approvals are still required for Customers with dual control settings enabled for transfers.