CitiDirect[®] Homepage - menu order and widgets

A simple home page for login allows users to benefit from basic system functionalities without the need to run more advanced options. Users can see a menu reflecting their authorizations in the system.

CitiDi	rect								AK
A	Payments	Loans	Receivables & Collections	Reports & Analytics	Inquiries & Searches	File Services	Self Service	Trade FX with CitiFX PULSE	
Client Logo	ged in as: ACTIVAT	ION & SUPP	ORT - POLAND	0 failed attempts sir	nce last login 15/0	2/2023 10:35:30 Del	tails		Linked Client: DEMO POLAND 🔻

Home page design customization through a wide array of widgets, (convenient features and shortcuts offering access to system information and functions) allows users to make use of selected options, such as:

- Easy execution of most important tasks from the home page
- Configuration of homepage shortcuts enabling quick transfer to a selected functionality in the system
- Access to a wide array of Bank products without the need for additional login (Single Sign-On).

Basic system modules available Payments - creating and au Trade/eForms - dealing witt Reports & Analytics - advai Inquiries & Searches - quicl File Services - import/expoi Self Service - system admir More Citi Products - other s	thorizing orders, templates transaction services and sub need reporting module access to operation history t of files	mission of electron	c applications		
Important messages for system users.)		Here you can add c to be displayed on These significantly	your homepage. improve functionality.	Settings - the possibility of personalization of global system settings (e.g. date format used) and modification of contact details.
Payments Pending Action	D Detais urry Information GDP D Initiate Payments	R - Important information		Broadcast Messages Customize Homepage	JAN KOWALSKI Settings Welcome Tour My Messages
Account Balances Account Balance Account Balance	Extract Enter filter criteria Templates Name Baneficiary Name Payment Currency Payment Currency Payment Method © Varyon Antione Currency Payment Method © Varyon Currency Curren	PLN Domestic Funds PLN Domestic Funds	ate: 11/18/2022 - 02/15/2023 Clear CCNB5201 FUR DI I Global Lo Cross Dorder Fu DD		Help Logout
Sample widgets, which are convenient shortcuts in the CitiDirect portal, may be added individually in the section Customize Homepage in the top right corner of the screen.]				

How to add / delete widgets?

In order to select helpful widgets on the home page, go to the Customize Homepage tab then click Add or Remove:

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Client Logged in as: DEMO POLAND 0 failed at	Itempts since last login 02/15/2023 11:11:33 Details				
			Broadcast Messages Customize Homepo	ge.	
				Broadcast Messages	e
Select Default Layout	Widget Gallery (6) Select Add to inst All Widgets New	all a widget to your homepage		Search Widgets X	
OR Select Layout Grid	Account Balances Remove Account Balances widget The Account Balances widget Drowled a cutomacable view of balance on up to 200 accounts and intra-dar cutomer positions - directly from your CibDirect BE	Initiate Payments Remove Initiate Payments Finite Finiter Fini	My Favorites Add My Favorite Snapchot view of favourde links you have added You can access any links on My Favorites widget on hardset of warsersen. You can also manage the order	Payment Status Add Payment Status widget allows Status and a specific transaction – directly toon your CeD	
	Payments Remove Payments Perform Authorization and Release tasks directly from the Childrect ER from page via the new Payments Pending Action	Reports Manager Add v Reports State The Reports Manager provides an enhanced user experience for managing reports that have been created in CHDirect Services. The	5		
Select Default Layout			e displayed (e.g. list our preferred arran		rtal web page in the design
Select Layout Grid		ected widgets can b idget Initiate payn		choosing the key " Custom	ize " - gear wheel symbol - for

NOTE: Once you log in to CitiDirect Portal, the recently entered user settings for homepage design are remembered by the system. Widget contents are automatically refreshed only at login. If the information presented in the widget is incorrect, please select **Refresh**.

How to log in to another company within a group of companies using the same token?

CitiDirect allows a configuration of authorizations so that it is possible to log in to other entities within one business name cluster with one token. In the case of giving users access to new functionalities of linking, the option Linked Client is displayed after login. After indicating a business name, click Go. The scope of available options in open profile settings will depend on individual user authorizations in the system.

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nange Client					
Lookup Clients	ecently Associated Clie	ents			
Client Name		Country/Juris	diction		
GFCID				Q	
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