



Business eBanking

Navigation Guide

Business eBanking Navigation

About Business eBanking

Business eBanking is Atlantic Union Bank's way for you to access and manage your business accounts. The system allows clients to complete a variety of activities:

- View account balances, transactions, and statements
- Move funds in a variety of ways: ACH, Wire, Bill Pay, Transfer between accounts
- Approve requested transactions
- Adjudicate exceptions
- Reconcile accounts

These features are available from the Welcome Page that users see when they log in to the system. This guide will help users navigate around the welcome page.

Note: For users who were enrolled in Business eBanking prior to January 21, 2021, this guide will also show how the new user experience translates to the prior system.

Welcome Screen Functions

The four main tabs at the top of the Welcome Screen (and other pages) are the primary paths to the following functions:

- Reports – access to Deposit, Incoming Wire and Returned Check reports as well as Statements.
- Money Movement – location for originating Scheduled Requests, internal Transfers, ACH or Wires
- Account Services – Stop Payment, Positive Pay and Image Search actions are accessed here
- Administration – Area for administrators to manage users and for users to manage their own profiles

The following elements are available through the Welcome Screen

1.	The greeting, date and time you last accessed the system, and the Sign off link.
2.	Alerts and bank mail. Click the View All link to go to the Received Mail and Alerts page.
3.	Messages to you from Atlantic Union Bank
4.	The Account Summary shows account balances for up to 10 accounts. Click the Show More link to view remaining accounts. To assist in prioritizing your most frequently used accounts, the Display Options link allows you to select favorite accounts and change the order in which the accounts are displayed.
5.	The Other Accounts section is a catch-all for account types not captured by one of the tabs in the Account Summary section.
6.	The Approvals link is displayed on every page as you move through the system, if applicable to the user. You can view all pending approvals and next scheduled requests.
7.	Welcome message.
8.	If applicable to the user, the Exceptions link allows you to view and act on ACH and/or check positive pay exceptions awaiting decision or approval. Exceptions are also displayed in a section on the <i>Welcome</i> page
9.	Favorites icon. Users can click this to access links to their favorite pages. If you had favorites in the previous version, they have been retained and systematically moved to the new version.
10.	All saved reports/searches from the old version are retained and carried over to the new one. As a reminder, saved reports are available if you have the Deposit Account Reporting (Premium Reporting) service

Welcome Screen/Dashboard (prior to January 21, 2021)

Previous to January 21, 2021, users saw the following screen with each of the elements listed above.

The screenshot shows the Business eBanking dashboard for user Jamie on August 20, 2020. The dashboard is divided into several sections:

- 1**: Welcome message and navigation menu.
- 2**: Recent Alerts & Messages section.
- 3**: Important Account Balances section, including Checking, Certificate of Deposit, Loan, and Credit Card accounts.
- 4**: Other Account Balances section, including Esrow Accounts and other accounts.
- 5**: User Profiles Approval section.
- 6**: Issues & Issue Files Approval section.
- 7**: Templates Approval section.
- 8**: Transfers & Payments Approval section.
- 9**: Exceptions Decision section.
- 10**: Shortcuts section, including Favorites and Saved Reports.

Welcome Screen (after January 21, 2021)

After January 21, 2021, users see the following screen with each of the elements listed above.

The screenshot shows the OurBank Digital One Business dashboard for user Jamie on August 19, 2020. The dashboard features a more modern layout with the following sections:

- 1**: Welcome message and navigation menu.
- 2**: Accounts Summary section, including a table of account balances.
- 3**: Other Accounts section, including an investment account.
- 4**: Exception Decisions section.
- 5**: Approvals section, including User Profiles, Issues, and Templates.
- 6**: Transfers & Payments section.
- 7**: Alerts and Messages section.
- 8**: Saved Reports section.
- 9**: Promotional banner for the mobile app.
- 10**: Fraud Protection banner.

Account	Available Balance	Current Balance	Accessible Balance
ACCESS CHECKING ABA/ATC - 770119300 9992	\$0,907,686.52	\$0,907,686.52	\$0,907,686.52
DEMAND DEPOSIT ACCOUNT ABA/ATC - 770119300 9991	Balance not available	Balance not available	Balance not available
HOMETOWN CHECKING ABA/ATC - 770119300 9994	(\$054.89)	(\$054.89)	(\$054.89)

If you need support, please contact Treasury Services Support at 877.920.6888, Monday – Friday 8 am – 5pm.