

# Adjusting ING Business home screen to your needs

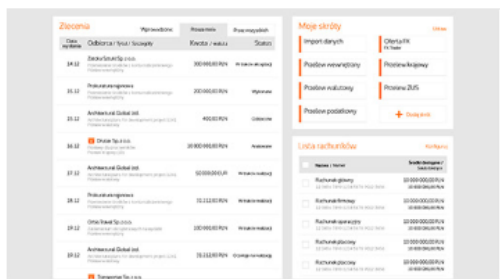
We have designed 2 home screens for your comfort: **operational** and **decisional**.

You will select your home screen when logging in for the first time:

## Select your home screen

**Operational screen** – I often input transfers and check account balances


- With the List of Orders I can view and manage the latest transfers inputted
- Overview of Accounts shows the finances of my company
- Panel of shortcuts makes it easier for me to move between system modules and commands



I choose operational screen

**Decisional screen** – I manage my company

- Thanks to data overview, I know the status of orders, requests and company messages all the time
- The chart helps me follow dynamically account balance changes
- Panel of shortcuts makes it easier for me to move between system modules and commands



I choose decisional screen

You can restore default settings of the screen at any given moment. Switch to **Edit mode** as per Item I of this User Guide and restore default settings of the screen as per Item II. You will use a similar path for switching between operational and decisional screens, which will be described under Item II.

You can modify the operational or decisional screen proposed by us by rearranging the modules on the screen (Go to Edit mode as per Item I and follow the instructions under Item IV). You can also add or remove the module in the Edit mode (we will elaborate on these changes under Items V and VI).

If you have access to a number of companies in ING Business, you can personalise the home screen for each of them separately.

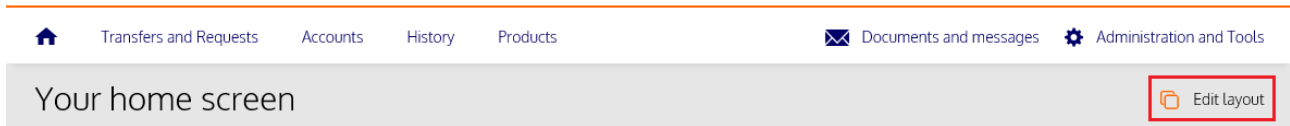
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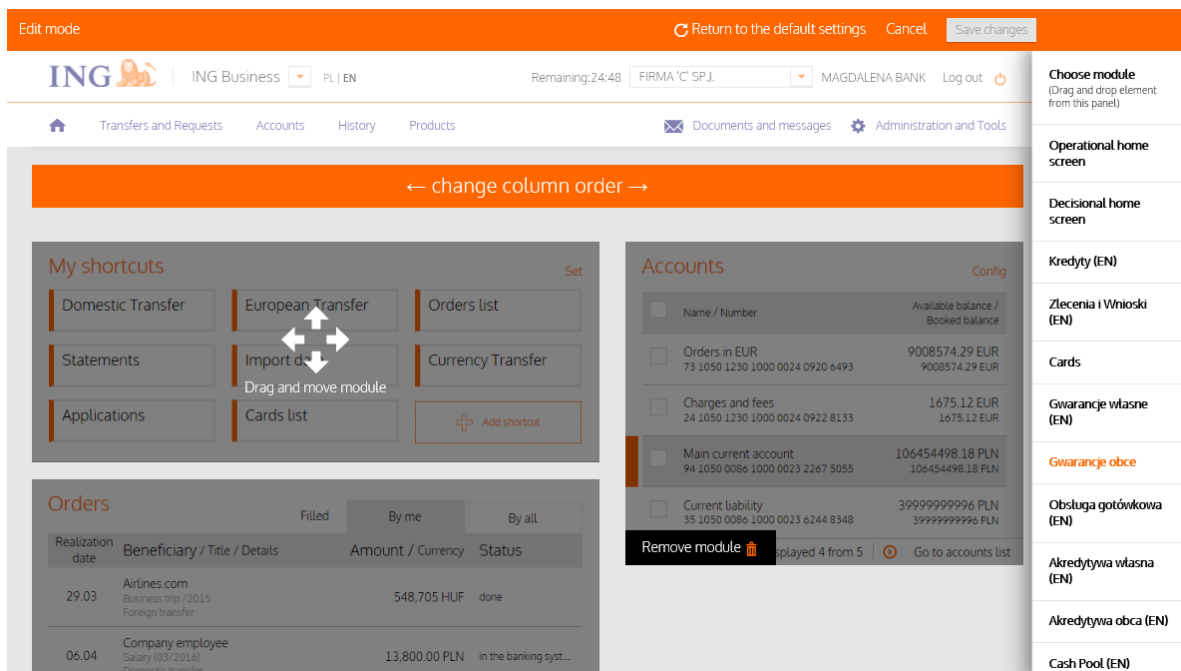
## I. Edit mode – how to make changes

Log into ING Business.

Click the link **Edit layout** at the upper right hand side of the home screen.



Your home screen will be in the Edit mode:



## II. Restoring default settings of the home screen

### STEP 1

Go to **Edit mode** as per Item A of the User Guide.

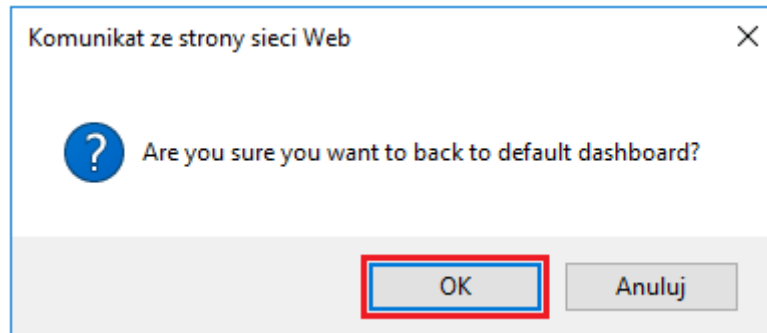
### STEP 2

To restore default settings, click **Return to the default settings** in the upper bar over the system header:

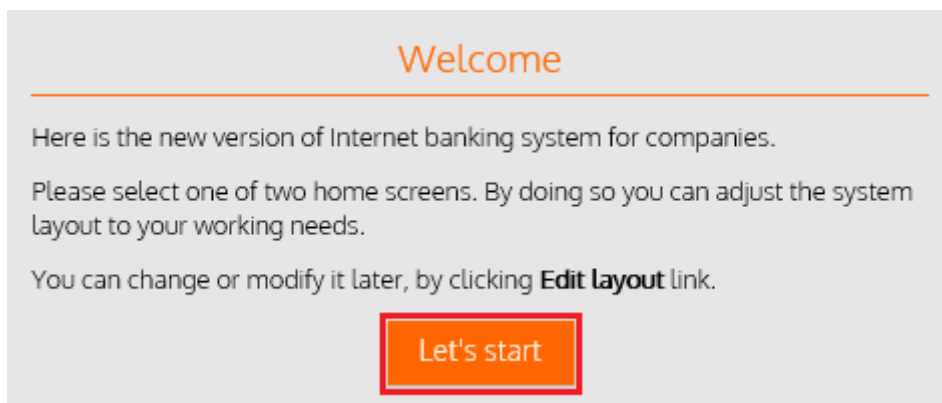


### STEP 3

Click **OK**, to return to the default settings proposed by the Bank.



Click **Start** to choose again one of the two home screens.

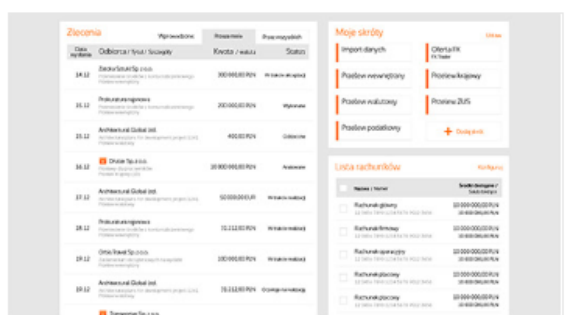


Select the home screen – confirm your choice with the orange button: **I choose operational screen** or **I choose decisional screen**.

### Select your home screen

#### Operational screen - I often input transfers and check account balances


- With the List of Orders I can view and manage the latest transfers inputted
- Overview of Accounts shows the finances of my company
- Panel of shortcuts makes it easier for me to move between system modules and commands



**I choose operational screen**

#### Decisional screen - I manage my company

- Thanks to data overview, I know the status of orders, requests and company messages all the time
- The chart helps me follow dynamically account balance changes
- Panel of shortcuts makes it easier for me to move between system modules and commands



**I choose decisional screen**

### III. Changing home screen layout

#### STEP 1

Go to **Edit mode** as per Item A of the User Guide.

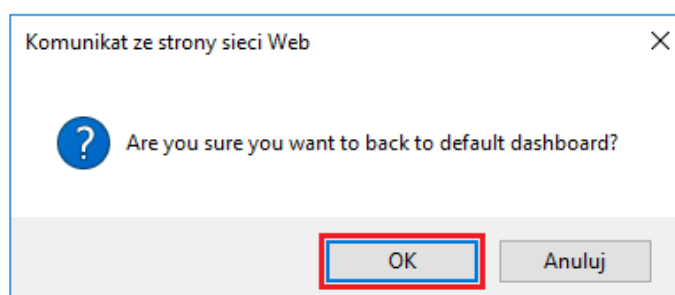
#### STEP 2

Click the link **Return to the default settings** in the orange bar in the upper part of the screen.



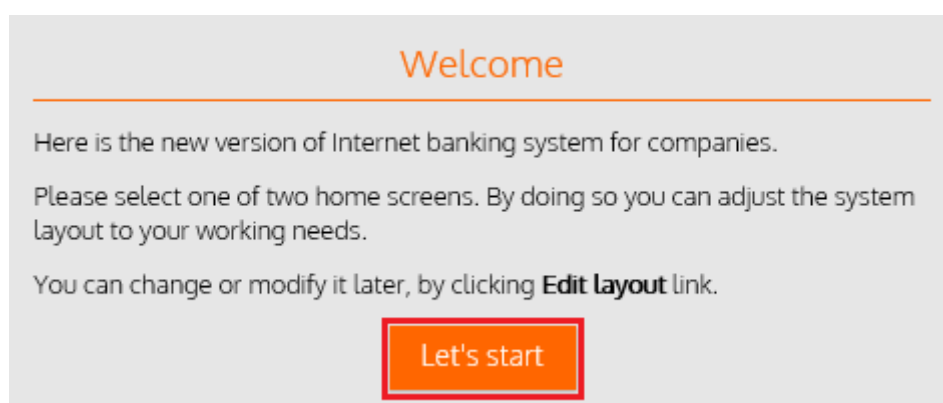
#### STEP 3

Click **OK** if you want to return to the choice of the home screen.



#### STEP 4

Click **Start** and

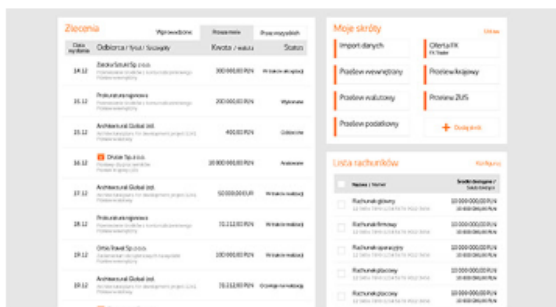


choose the home screen you want to use. Confirm your choice with the orange button **I choose operational screen** or **I choose decisional screen**.

## Select your home screen

Operational screen - I often input transfers and check account balances

- With the List of Orders I can view and manage the latest transfers inputted
- Overview of Accounts shows the finances of my company
- Panel of shortcuts makes it easier for me to move between system modules and commands



I choose operational screen

Decisional screen - I manage my company

- Thanks to data overview, I know the status of orders, requests and company messages all the time
- The chart helps me follow dynamically account balance changes
- Panel of shortcuts makes it easier for me to move between system modules and commands



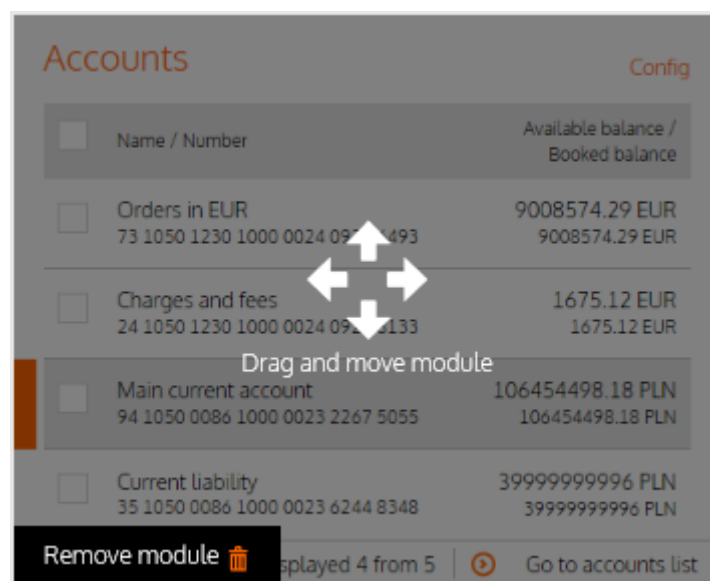
I choose decisional screen

## IV. changing modules layout

### A. Description of modules

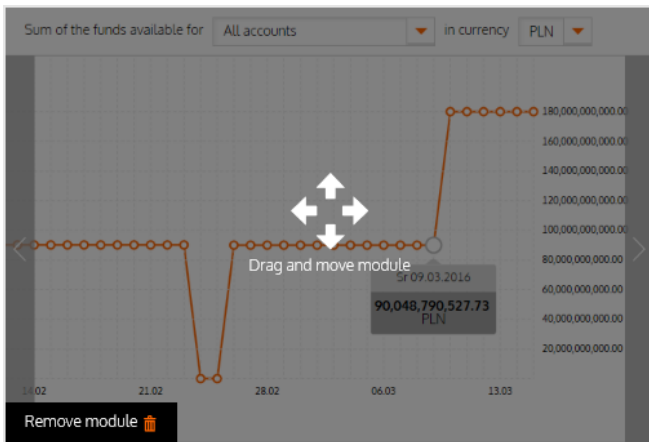
There are three types of modules on the desktop:

- **The narrowest module – 2/5 screen width**  
You can drop a module for 3/5 of the screen width next to such a module.



→ **3/5 screen width module**

You can drop a module for 2/5 of the screen width next to such a module.

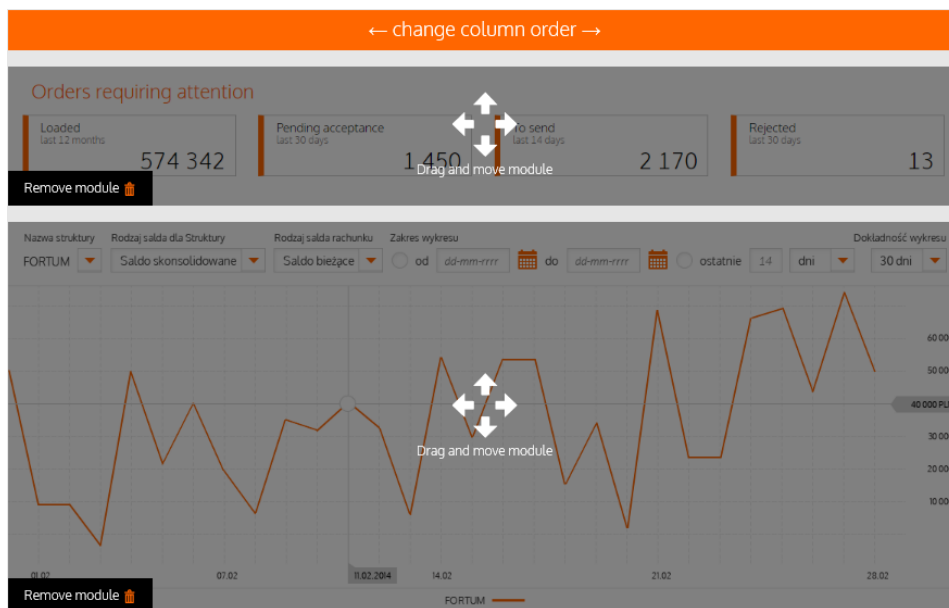


A screenshot of an "Orders" table module. It has a search bar and a "Filters" button. The table has columns for "Realization date", "Beneficiary / Title / Details", and "Status". The table contains several rows of order data. A "Drag and move module" icon is positioned over one of the rows. A "Remove module" button is at the bottom left. At the bottom right, it says "Displayed 5 from 10" and "See all".

Realization date	Beneficiary / Title / Details	Status
24.06	Tax batch Orders: 2 Domestic ord...	accepted Send
24.06	Airlines.com test sortowania 5 magi Foreign transf...	accepted Sign and send
25.06	The Courier Dedicated vehicles Foreign transf...	loaded Sign and send
26.06	Trading Partner Ltd. business plan 2016 Foreign transf...	accepted Sign and send
27.06	Paper shop Stationery and Paper decorations Foreign transf...	loaded Sign and send

→ **Full screen width module**

It is not possible to add another module as it occupies the entire width of the screen. This module can be placed in the upper part of the screen and you can drop it only there.



**B. Changing column sequence on the home screen**

Modules visible on the home screen are displayed in two columns.

**STEP 1**

Go to **Edit mode** as per Item I of the User Guide.

## STEP 2

In order to change the sequence of columns, click the action Change Columns in the orange bar under the main navigation of the system.

← change column order →

2/5 screen width modules will change sides with 3/5 screen width modules. Full screen width modules will not change their position.

## STEP 3

Click **Save Changes** in the orange bar over the system header if you accept the change. Click **Cancel** to cancel the modification.

Return to the default settings Cancel Save changes

## C. Changing modules layout

### STEP 1

Go to **Edit mode** as per Item I of the User Guide.

### STEP 2

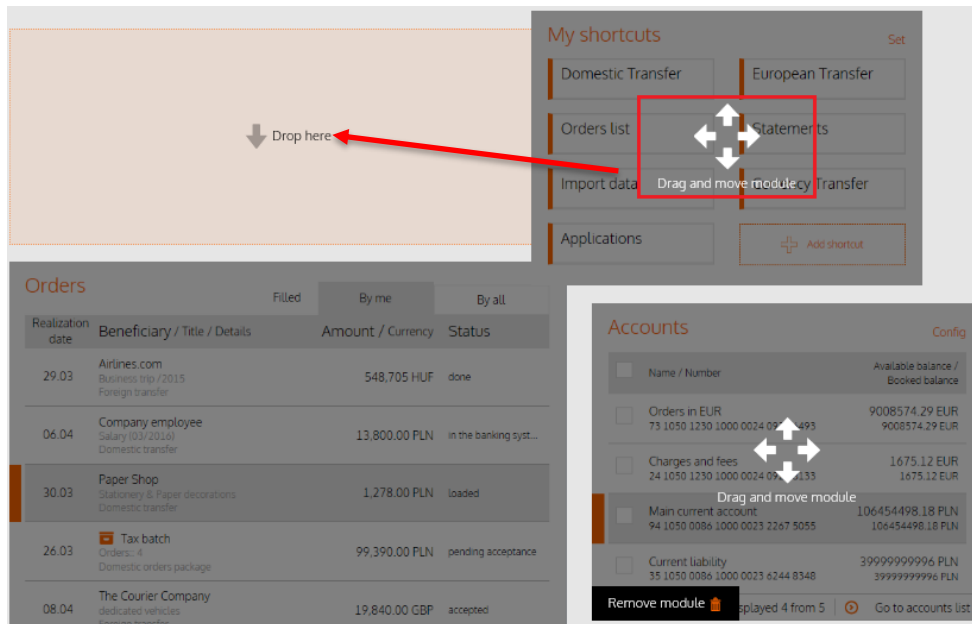
Click the icon **Drag and move module** in the centre of the module which position you want to change and holding down the mouse button move it to the desired position:

Realization date	Beneficiary / Title / Details	Amount / Currency	Status
29.03	Airlines.com Business trip / 2015 Foreign transfer	548,705 HUF	done
06.04	Company employee Salary 03/2016 Domestic transfer	13,800.00 PLN	in the banking syst...
30.03	Paper Shop Stationery & Paper decorations Domestic transfer	1,278.00 PLN	loaded
26.03	Tax batch Orders: 4 Domestic orders package	99,390.00 PLN	pending acceptance
08.04	The Courier Company dedicated vehicles Foreign transfer	19,840.00 GBP	accepted
26.03	Current charges and fees Orders: 4 Domestic orders package	22,341.42 PLN	pending acceptance
01.04	Trading Partner Ltd. Business plan 2016 Domestic transfer	38,700.00 PLN	in the banking syst...
26.03	Advertising agency Marketing campaign European transfer	21,500.00 EUR	cancelled

Name / Number	Available balance / Booked balance
Orders in EUR 73 1050 1230 1000 0024 09 1333	9008574.29 EUR 9008574.29 EUR
Charges and fees 24 1050 1230 1000 0024 09 1333	1675.12 EUR 1675.12 EUR
Main current account 94 1050 0086 1000 0023 2267 5055	106154498.18 PLN 106454498.18 PLN
Current liability 35 1050 0086 1000 0023 6244 8348	39999999996 PLN 39999999996 PLN

### STEP 3

You will see an orange field with a description **Drop Here** in the place where you can drop the module. This field will suggest the place where you can drop the selected module.



Remember:

- You will not be able to drop a 2/5 screen width module in the column of 3/5 screen width modules.
- You will not be able to drop a 3/5 screen width module in the column of 2/5 screen width modules.
- You can drop a full screen width module only at the top of the screen.

### STEP 4

Click **Save changes** in the orange bar over the system header if you want to save the change. Click Cancel to resign.



## V. Adding the module

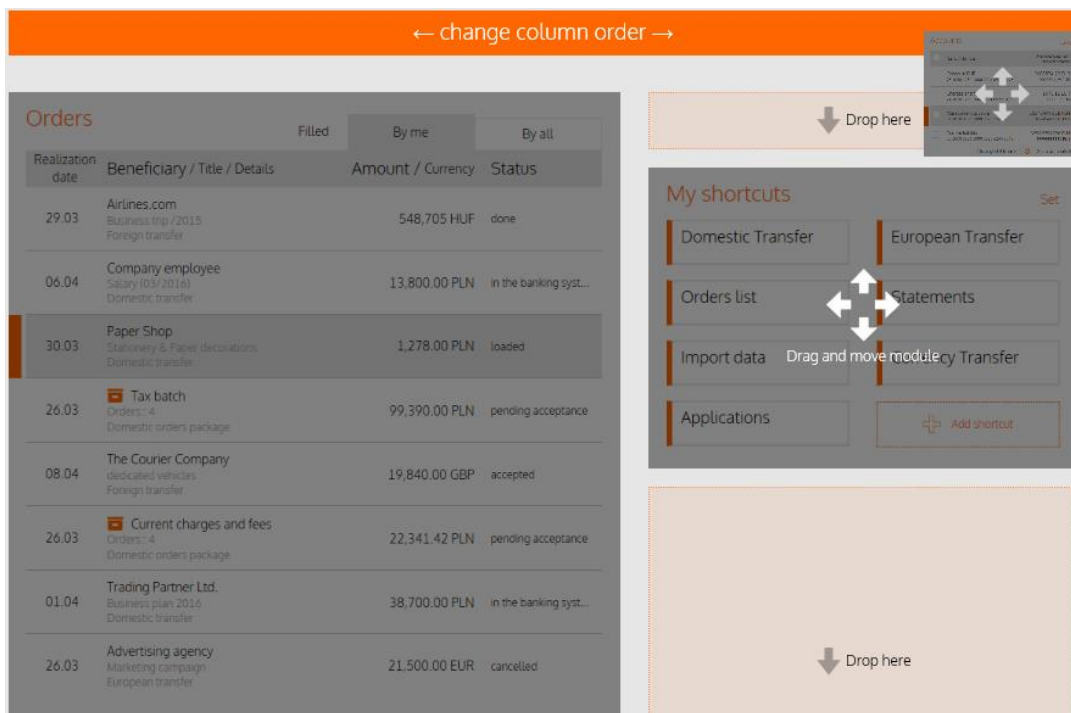
### STEP 1

Go to **Edit mode** as per Item I of the User Guide.

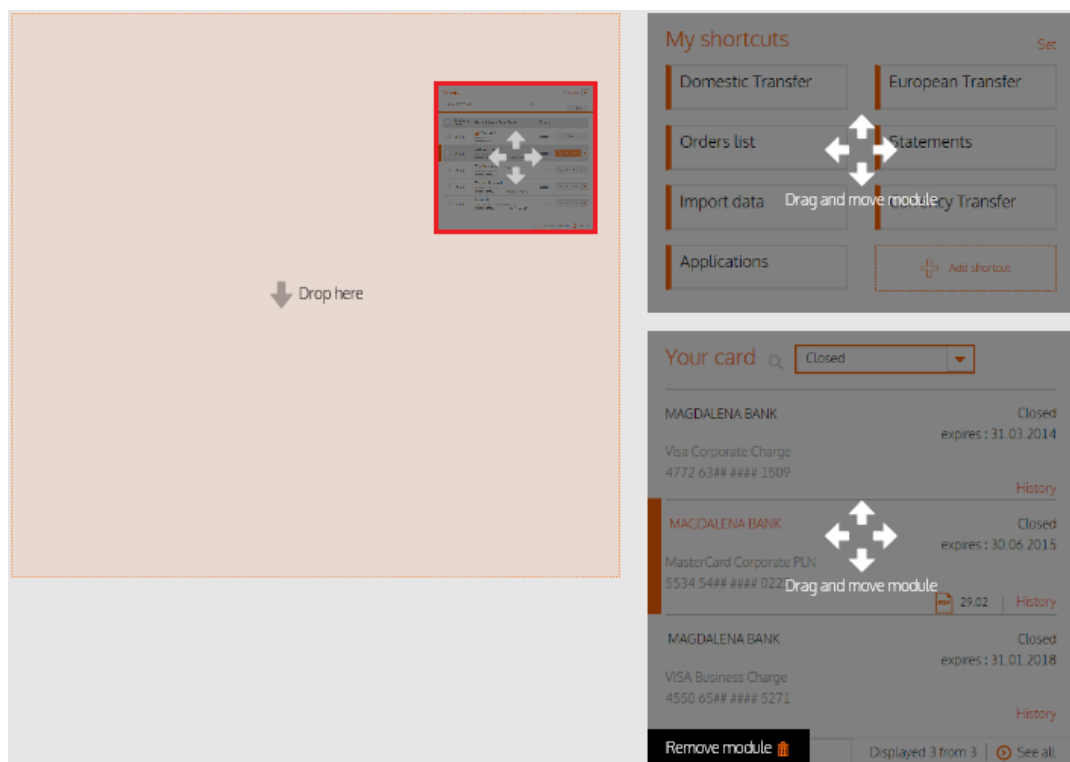
### STEP 2

Modules developed for the home screen have been clustered – a list of available groups of modules is available on the panel at the right hand side of the screen. To check modules available in a given subgroup click the group header.

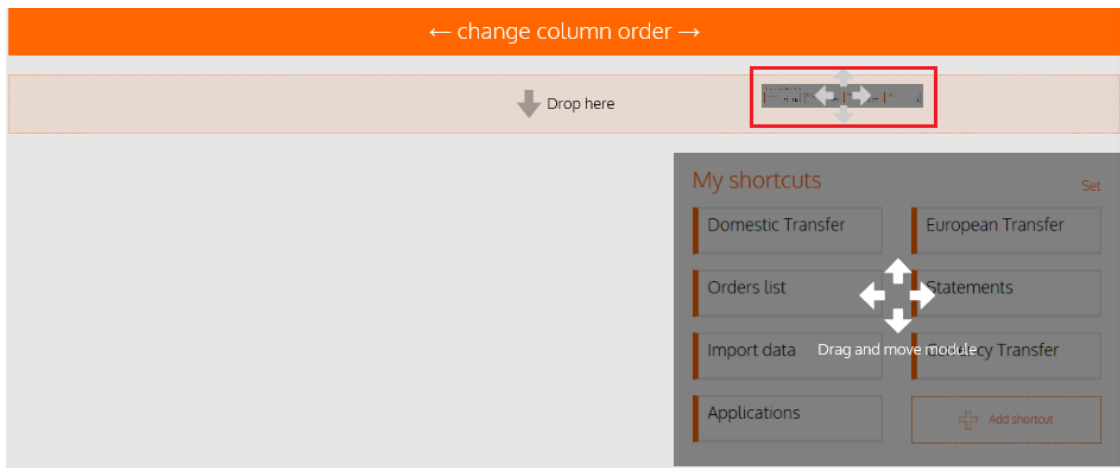




→ You can drop a 3/5 screen width module only in the wider column on the screen.

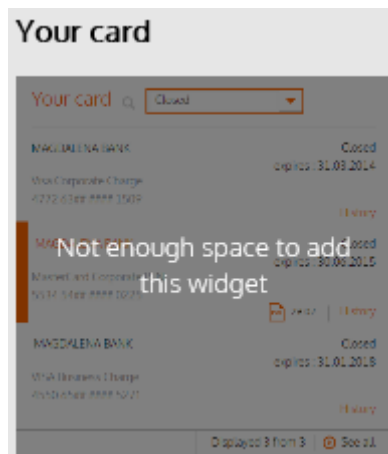


→ You can drop a full screen width module only at the top of the screen.



### STEP 3

You can add no more than 3 modules in one column on the screen. If you exceed the limit of 3 modules in one column, the message Not enough space to add this widget will pop up on the module thumbnail.



### STEP 4

Click **Save Changes** in the orange bar over the system header to save the changes.

Click **Cancel** to resign.



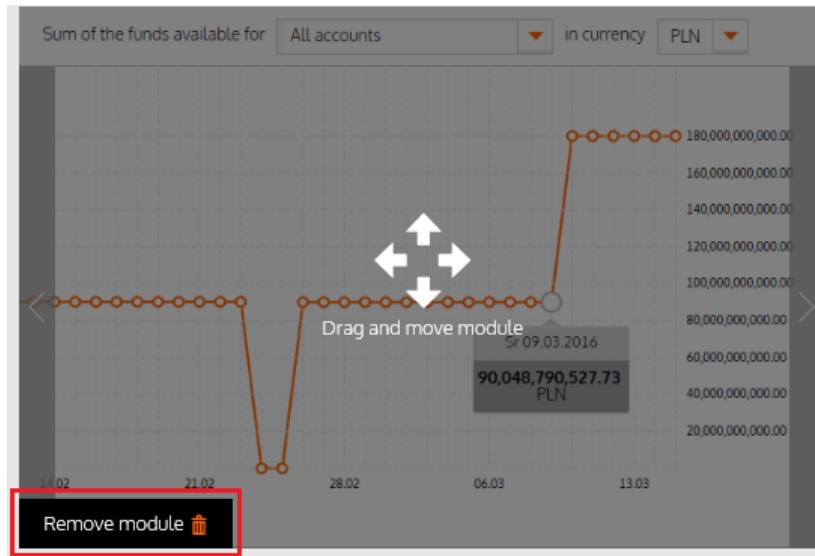
## VI. Removing the module

### STEP 1

Go to **Edit mode** as per Item I of the User Guide.

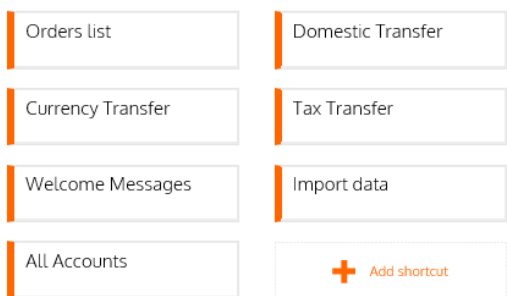
## STEP 2

There is a **Remove module** button at the bottom left hand side of each removable module.

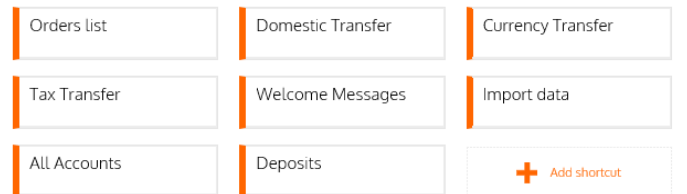


**My shortcuts** are the only module that cannot be removed – you can only change its width from 2/5 to 3/5.

### My shortcuts

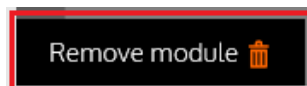


### My shortcuts



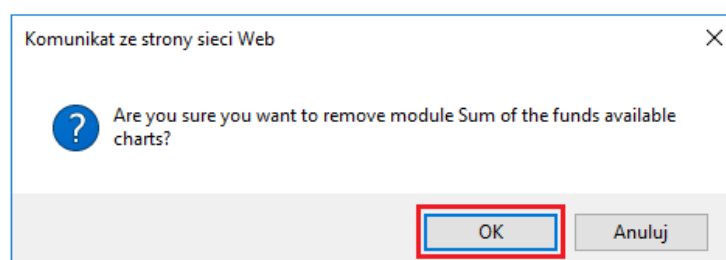
## STEP 3

Click **Remove module** if you do not want to see the module on your home screen.



## STEP 4

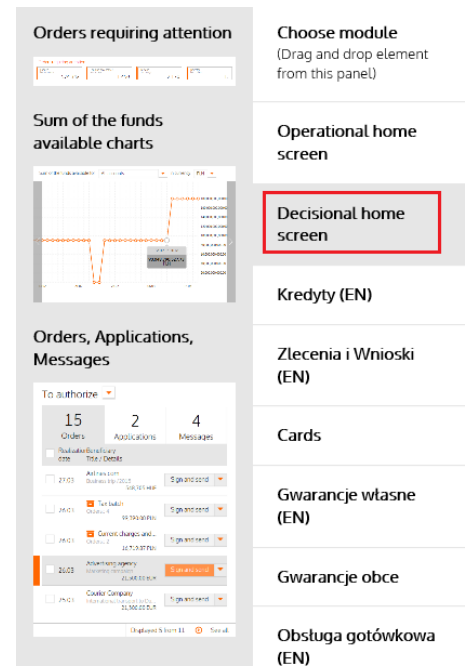
Confirm your decision with the **OK** button if you are positive about removing the module from the system home screen.



## STEP 5

Remember that you can restore the removed module onto the screen. It will be available on the list of modules on the panel on the right hand side of the screen.

E.g. I removed the Chart module which is part of the decisional screen. I click the item **Decisional home screen** on the right hand side of the screen and I can see the Chart thumbnail.



## STEP 6

Click **Save Changes** in the orange bar over the system header to save the changes.

Click **Cancel** to resign.



Should you have any questions please call ING Business Centre: 32 357 00 24 or 801 242 242 or write to us at: [bc@ingbank.pl](mailto:bc@ingbank.pl). Our advisors are available on business days Monday through Friday from 8 a.m. to 6 p.m.