

# ProCash Dashboard & Common Features

# Table of contents

<b>1. Introduction</b> .....	<b>3</b>
<b>2. Dashboard</b> .....	<b>3</b>
2.1 Quick Widgets .....	4
2.2 Information Panels .....	5
<b>3. Common Features</b> .....	<b>9</b>
3.1 User Menu .....	9
3.2 Quick Links .....	11
3.3 Lists Customisation .....	12

## 1. Introduction

This guide provides you a detailed explanation about the Dashboard page and about the common features that are available across ProCash like, for instance, quick links and user menu.

For more information on other ProCash modules or other payment types, please refer to their respective guides.

## 2. Dashboard

The Dashboard page in ProCash provides you with not only an overview about major indicators but also has readily available features that improve your BAU activities by making them more efficient and faster.

To access the Dashboard page and benefit from using these features, you just need to select the Dashboard tab available on the left panel (Image 1).

These features will be described in this chapter and are:

- Quick Widgets
- Information panels
- Quick links

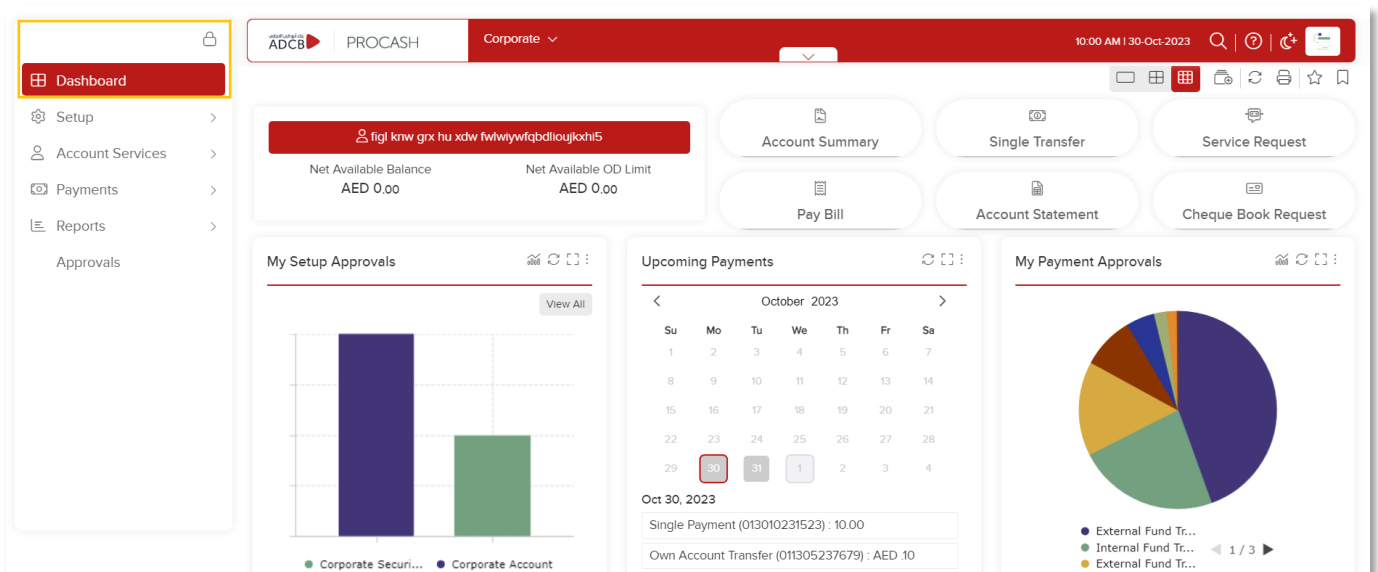


Image 1 – Dashboard page

## 2.1. Quick Widgets

In the Dashboard page, you will see six widgets or buttons that you can use to quickly access the respective screen/page (Image 2).

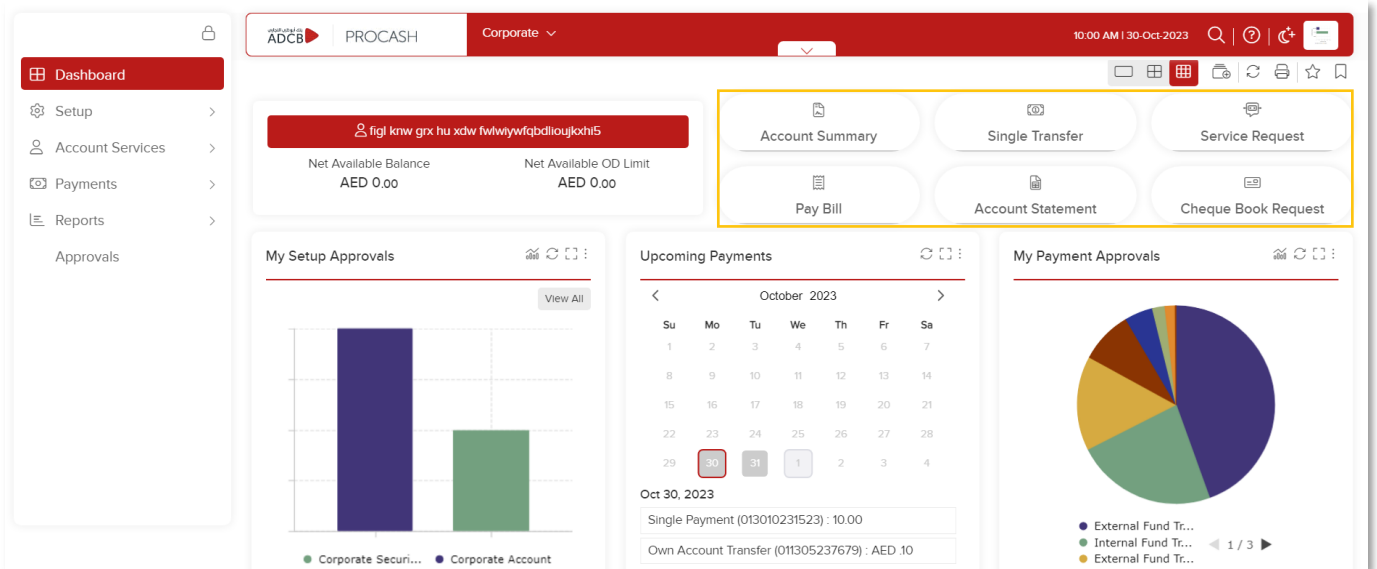


Image 2 – Dashboard page | Quick Widgets

The maximum number of widgets that you will be able to see is six and are based on your module access, which means that, for instance, in case you don't have access to Single Transfer module, the Single Transfer widget won't be available to you.

However, if you prefer to have different widgets readily available, you can delete and add any widget at any time. To delete a widget, you need to select the bin icon that is displayed once the mouse is over the respective widget; to add any widget, you need to select the plus icon (Image 3).

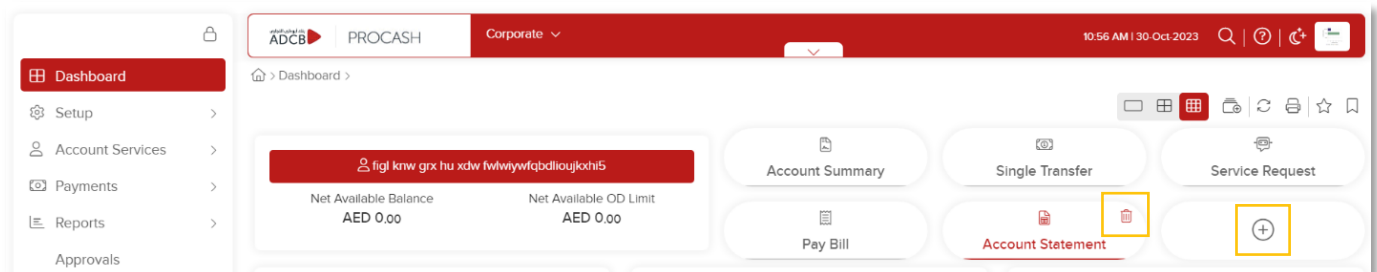
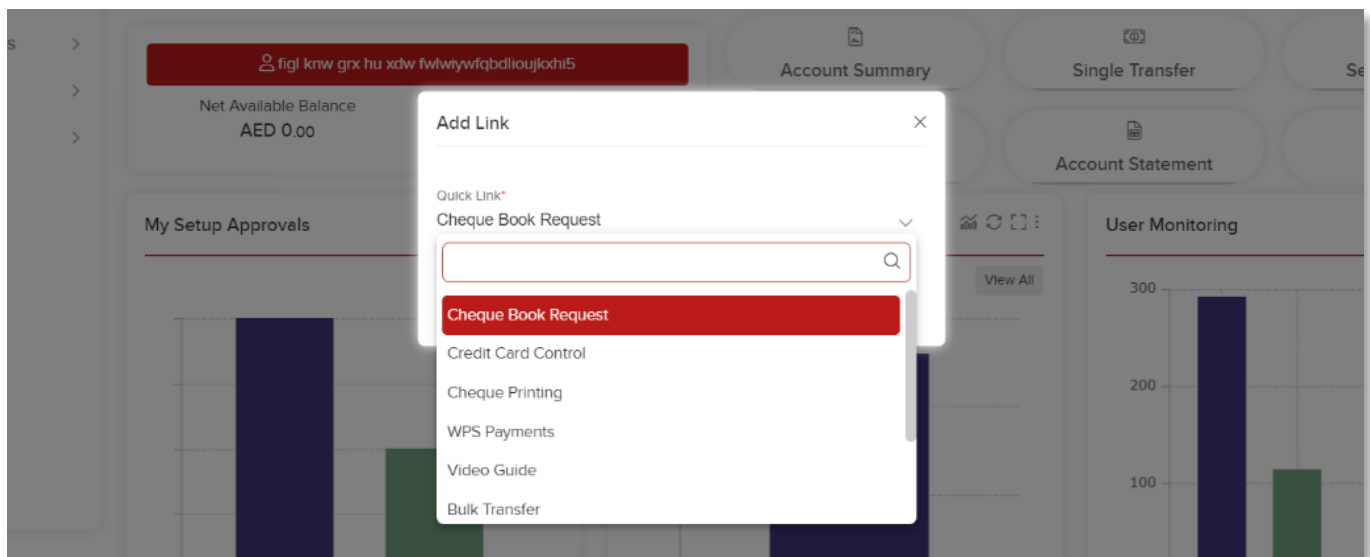


Image 3 – Dashboard page | Adding and removing widgets

Once the plus icon is selected, you will be able to choose the widget you want from a given list (Image 4). In case you have access to all modules, the list will provide all ProCash widgets which are:

- Account Statement
- Account Summary
- Bulk Transfer
- Cheque Printing
- Cheque Book Request
- Credit Card Control
- Debit Card Control
- Pay Bill
- Single Transfer
- Service Request
- Own Account Transfer
- WPS Payments
- Video Guide



*Image 4 – Dashboard Page | Widget selection*

It is also important to note that the page in which you land after selecting a particular widget can differ based on the user accesses. For example, if a checker is selecting the Single Transfer widget, the landing page will be the Authorizations page and if a maker is selecting the same widget, then the landing page will be the Single Transfer Initiation page.

## 2.2. Information Panels

As soon as you land on the Dashboard, you will see a set of panels in either graphical, calendar or input representation. These panels enable you to have a quick overview about relevant indicators, to take some immediate action on, for instance, upcoming payments and to perform quick payments (Image 5).

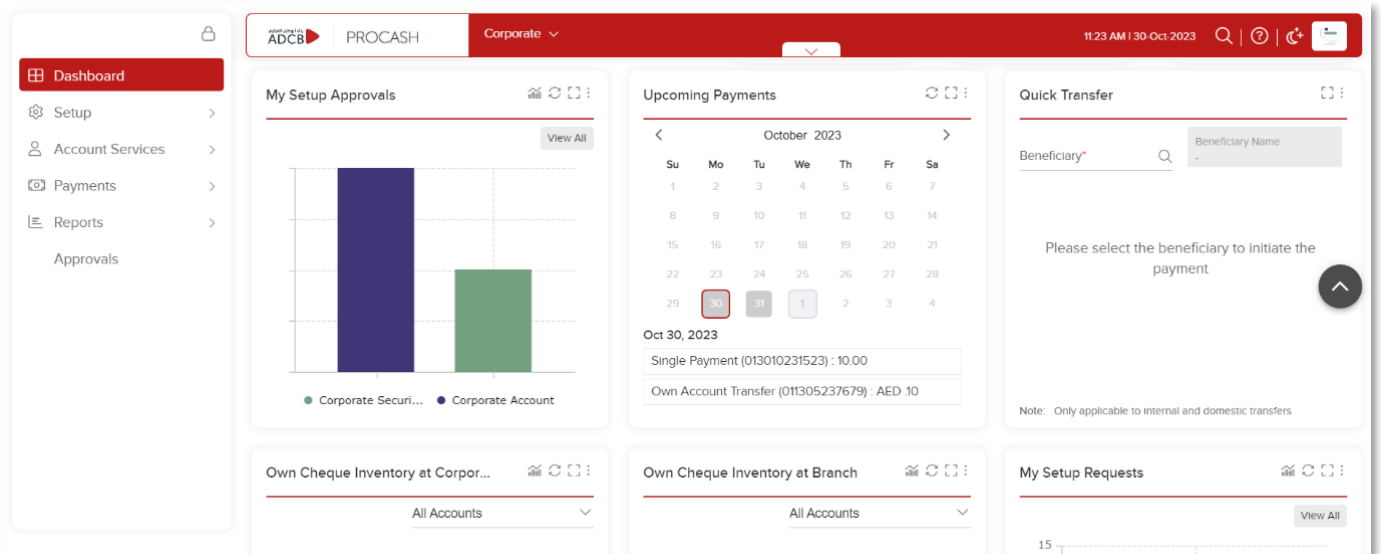


Image 5 – Dashboard page | Information panels

In case you want to download, print or remove a specific panel, you can do so by selecting the three dots icon at the top right corner of each panel. It is also possible to add or remove any panel by selecting the multiple page icon available in the quick links bar at the top right corner of the page (Image 6).

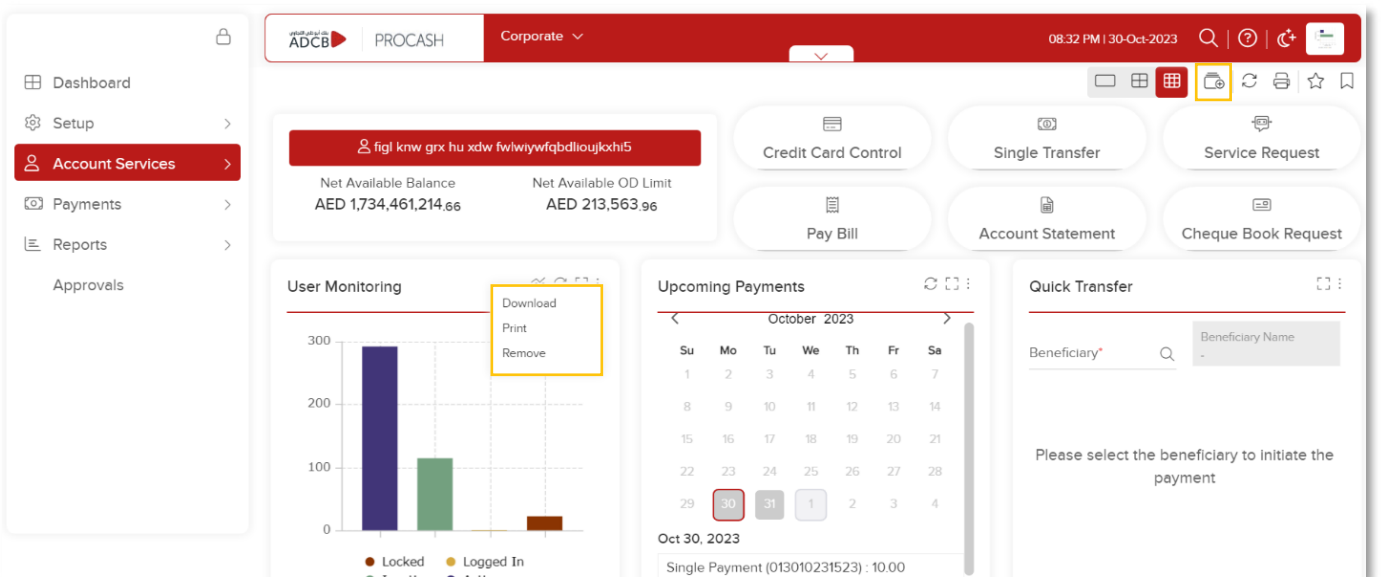


Image 6 – Dashboard page | Download, print or remove information panels

The available panels vary according to each user’s access, which means that some users can see all ProCash panels and others just a few. In this guide we will be describing all panels that ProCash can provide which are (Image 7):

- My Setup Approvals – Provides the count of Setups pending for approval
- My Setup Requests – Provides the count of Setups requested

- User Monitoring – Provides statuses of the users within your corporate
- Quick Transfer – Used to initiate internal and domestic transfers
- Upcoming Payments – Shows the upcoming payments of the day
- Advertisement – Used to show some campaigns, promotions or important information
- Own Cheque inventory at Branch – Shows the volume of own cheques at branches
- My Account Service Requests – Gives the volume of the requested account services
- My Account Service Approvals – Gives the volume of the account services for approval
- My Payment Approvals – Gives the volume of each payment method to be approved
- My Payment Approvals (per module) – Shows the volume of initiated payment requests
- Cheque Printing and Reconcile – Gives information about the cheque printing status

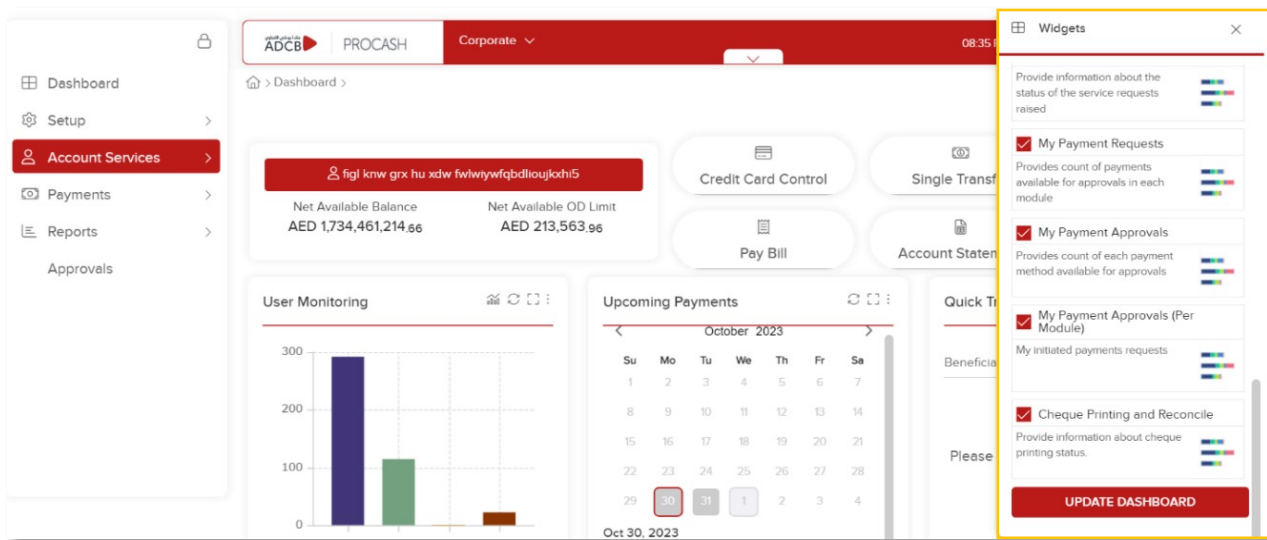


Image 7 – Dashboard page | Available widgets

It is also possible to change the graphical representations (bar chart, pie chart, column chart, etc.), to refresh the data and to expand each panel. To do so, you just need to select the graphical

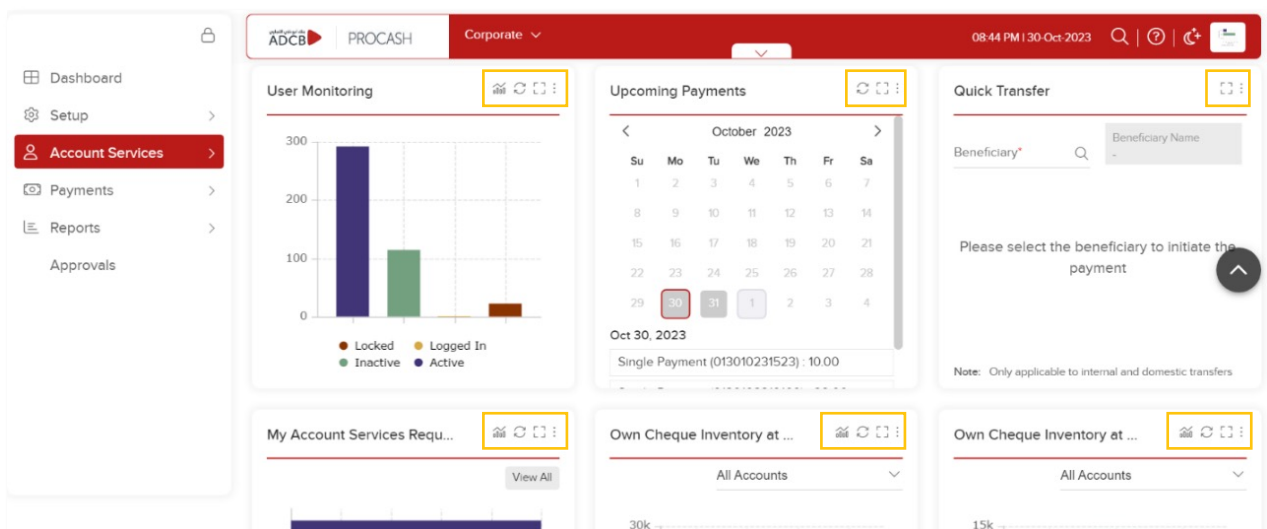


Image 8 – Dashboard page | Information panels options

representation, refresh and expand the icons at the top right corner of each panel, respectively (Image 8).

Finally, if you want to change the overall layout of the panels, you can opt to have one, two or three panels per line. To do so, you must select any of the grid icons available on the top right corner of the screen (Images 9 and 10).

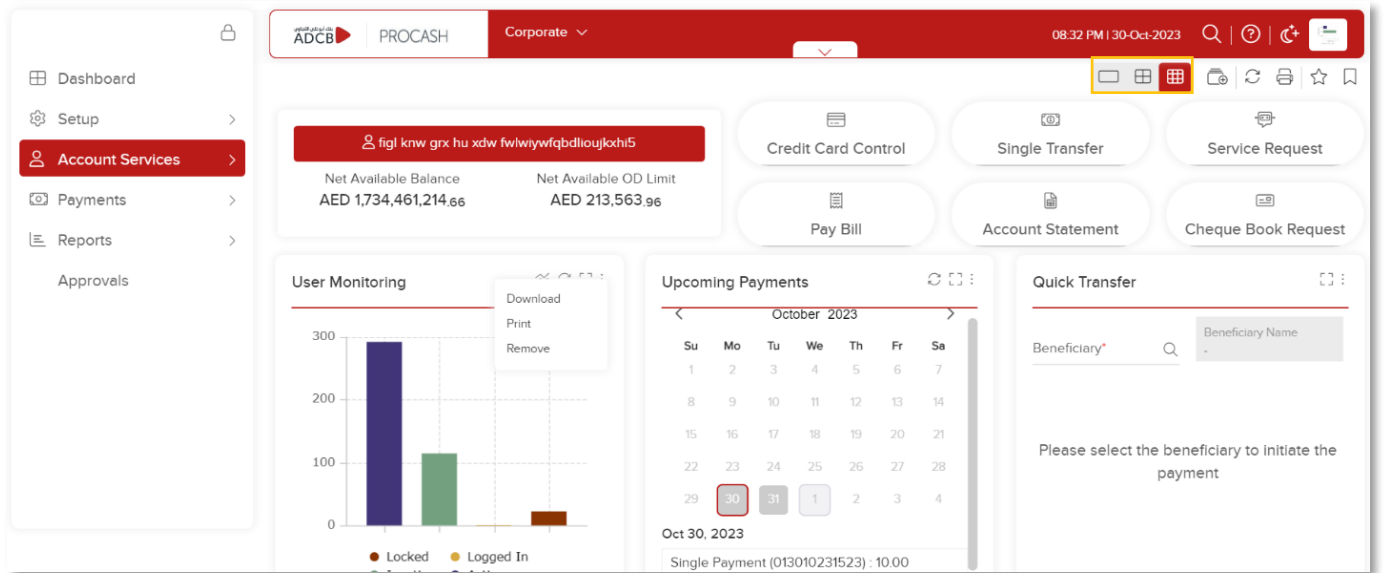


Image 9 – Dashboard page | Information panels layout (3 panels in a row)

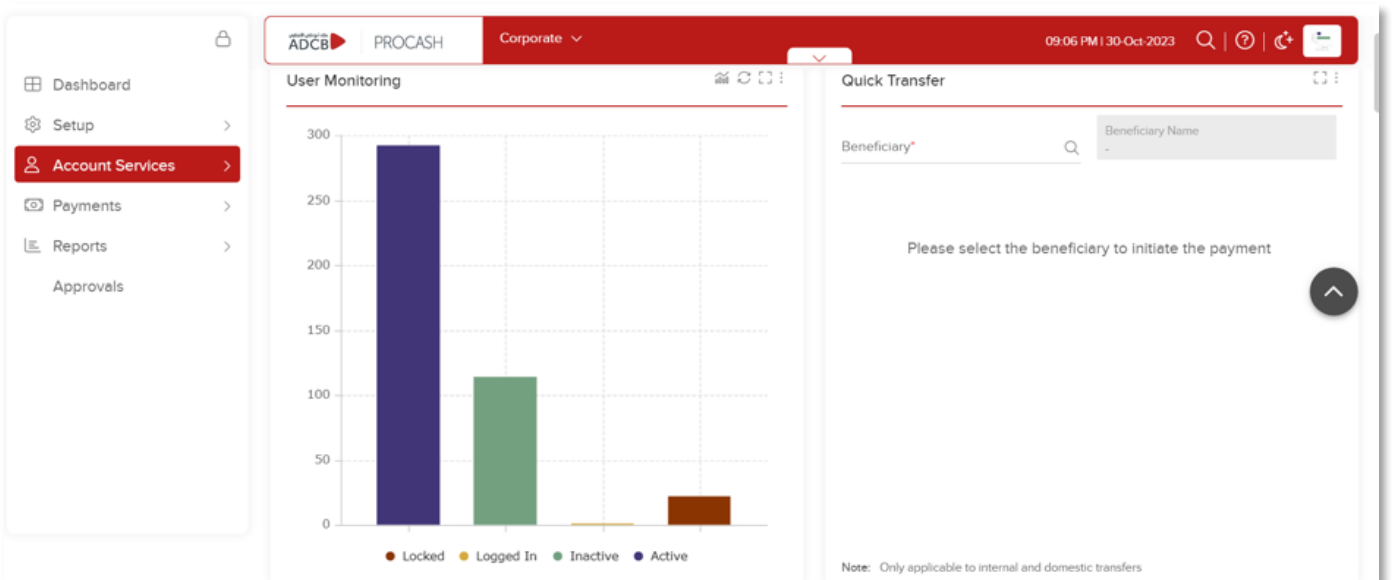


Image 10 – Dashboard page | Information panels layout (2 panels in a row)

### 3. Common Features

This chapter will describe some features that are available across all ProCash pages, namely the user menu and the quick links that are available at the top right corner bar.

#### 3.1. User Menu

Across all ProCash pages you have a bar on top that can be expanded; it displays the date and time information and has some actionable icons (Image 11).

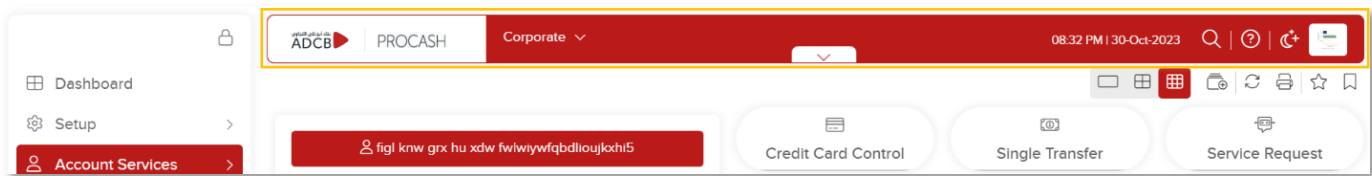


Image 11 – Common features | User menu

Also, through this bar you can:

- View the exact time and date which is displayed on this bar
- Click on the search icon to look for a specific menu or module within ProCash. This is a dynamic search menu, which means that, whenever you type a keyword, the respective module options are given. For example, if you type 'single payment', all single payment options are given and upon clicking it, it guides you to the respective page (Image 12)

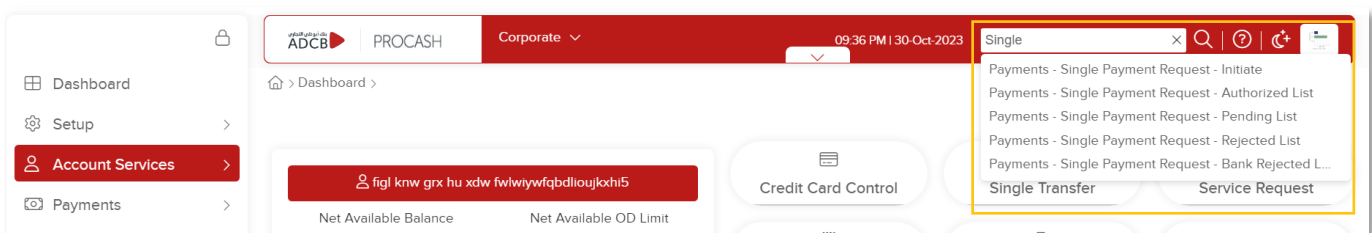


Image 12 – Common features | User menu – Search option

- Select the question mark icon which provides you two options—Video Guide and Feedback & Suggestions. Clicking on any of these options will lead you to the respective pages (Image 13)



Image 13 – Common features | User menu – Help option

- Opt for using either the dark mode or light mode at any given time (Image 14)

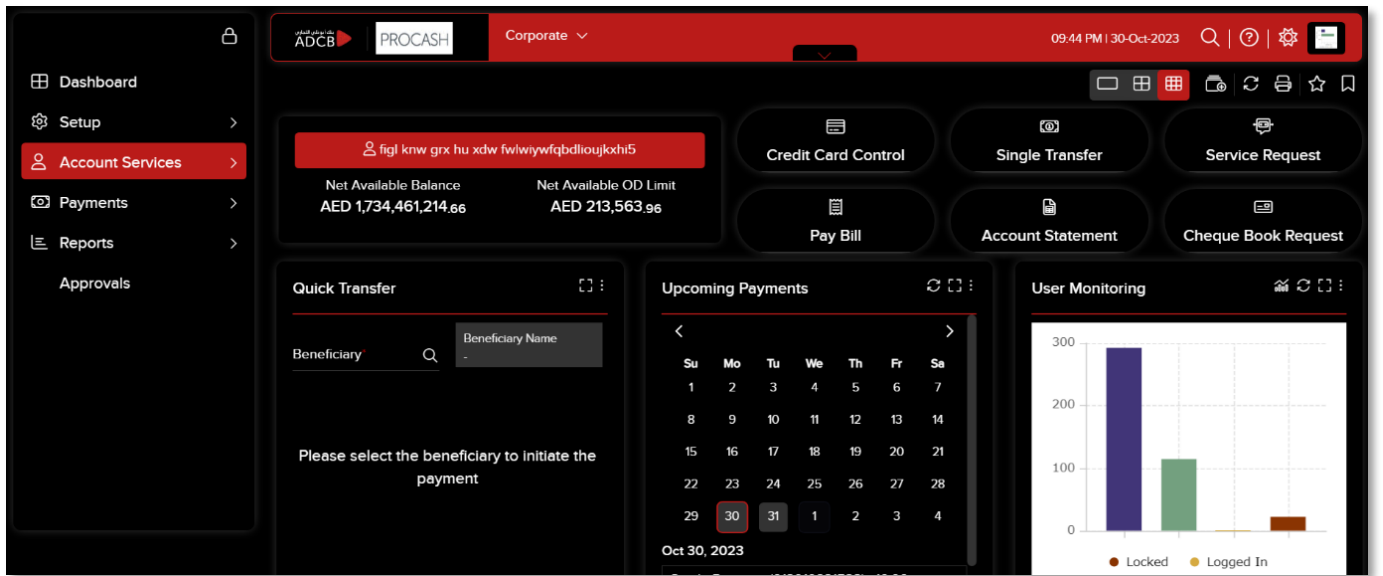


Image 14 – Common features | User menu – Dark/light mode

- View your account details like Corporate name, User ID, Last login details and activities, Last Failed login, Edit your profile, Logout (Image 15). Upon selecting the Edit Profile option, you will land on a page where you can edit your user information and personalise your login and dashboard preferences

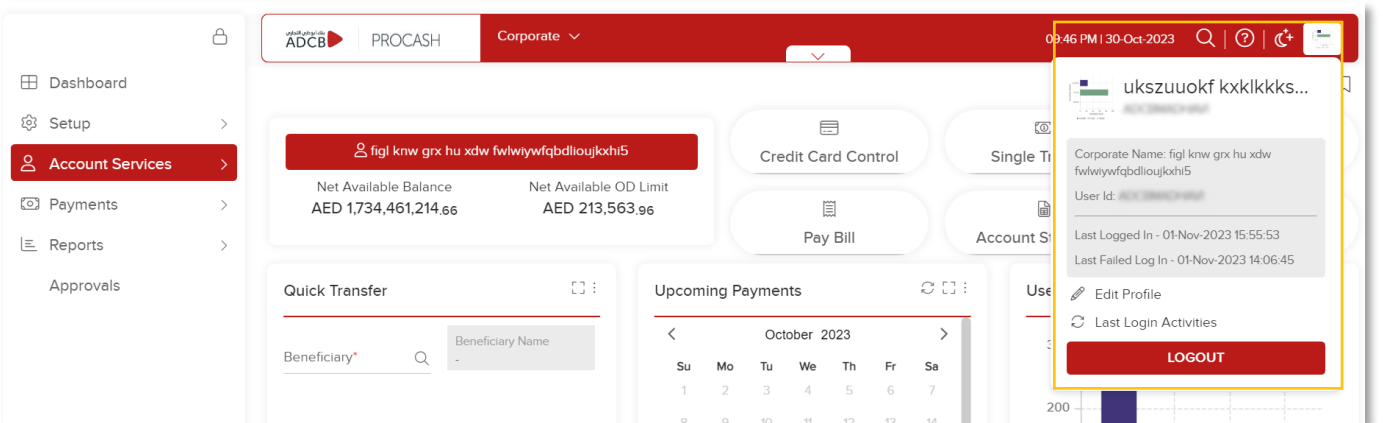


Image 15 – Common features | User menu – Account details option

- Expand or collapse the bar by selecting the white arrow. When expanded, you will be able to view your Trade license number and its expiry date and your assigned RM name and their contact details (Image 16)

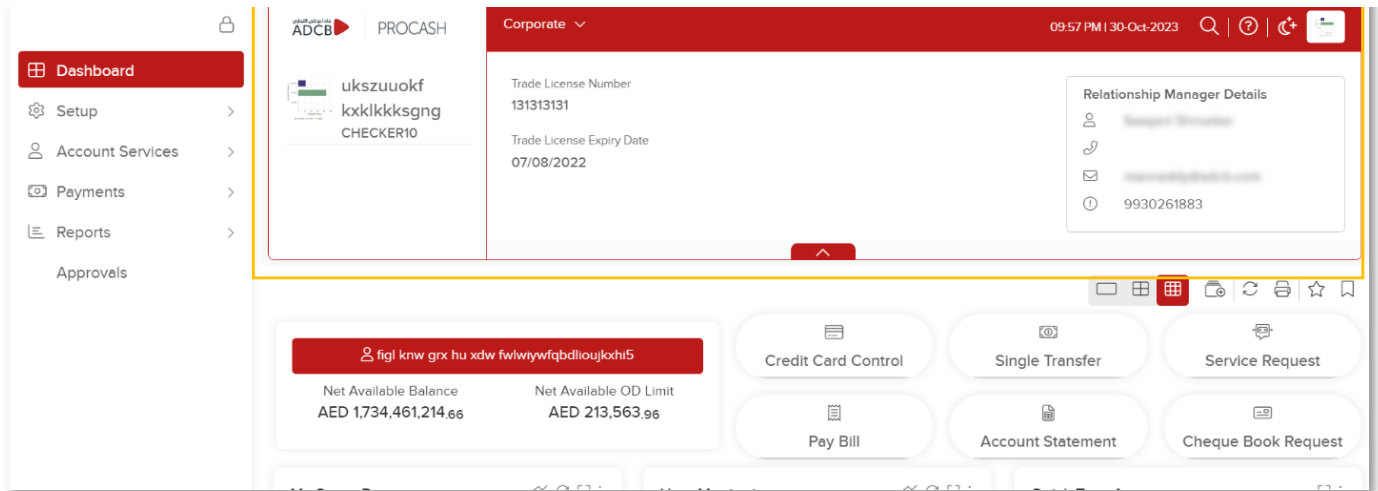


Image 16 – Common features | User menu – Expanded options

### 3.2. Quick Links

Across all ProCash pages, you have a bar on the top right corner with some clickable icons that you can use to perform the following actions (Image 17):

- Refresh the page by selecting the refresh icon
- Print the page by selecting the printer icon
- Add a page to favourites by selecting the star icon
- Access your favourite pages by selecting the chain icon
- Access self-explanatory guides by selecting the book icon

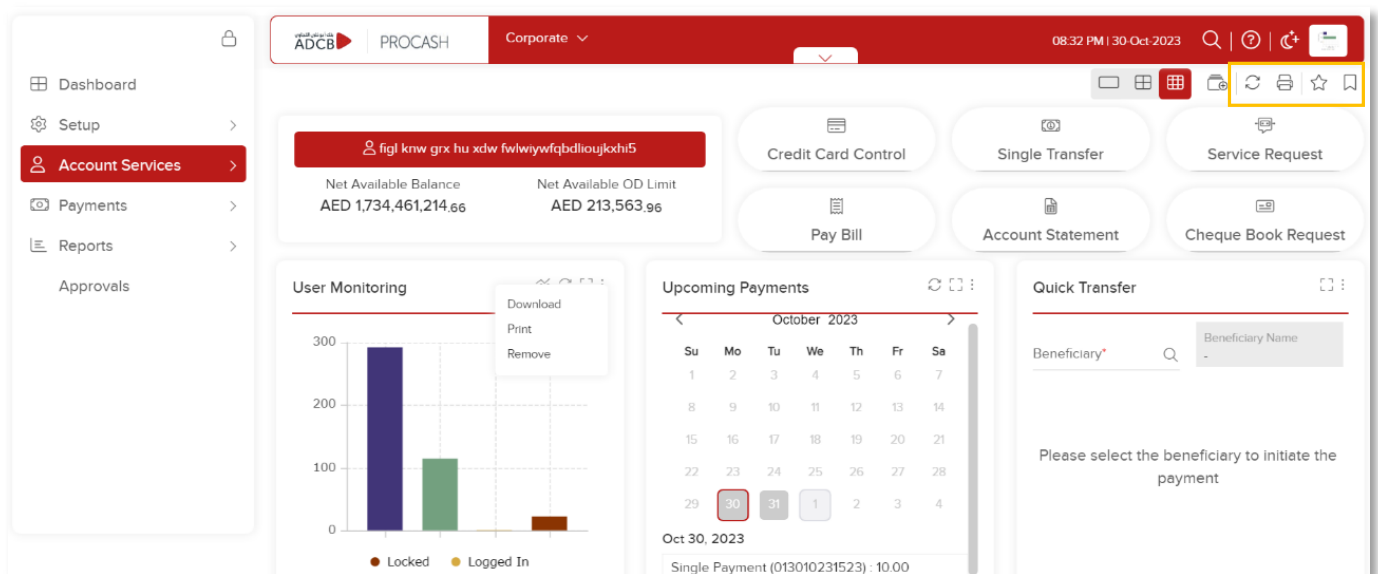


Image 17 – Common features | Quick links

### 3.3. Lists Customisation

ProCash lists always follow a table format like the one presented (Image 18) as the table format allows you to customise your list by performing multiple display actions that can be saved per user session.

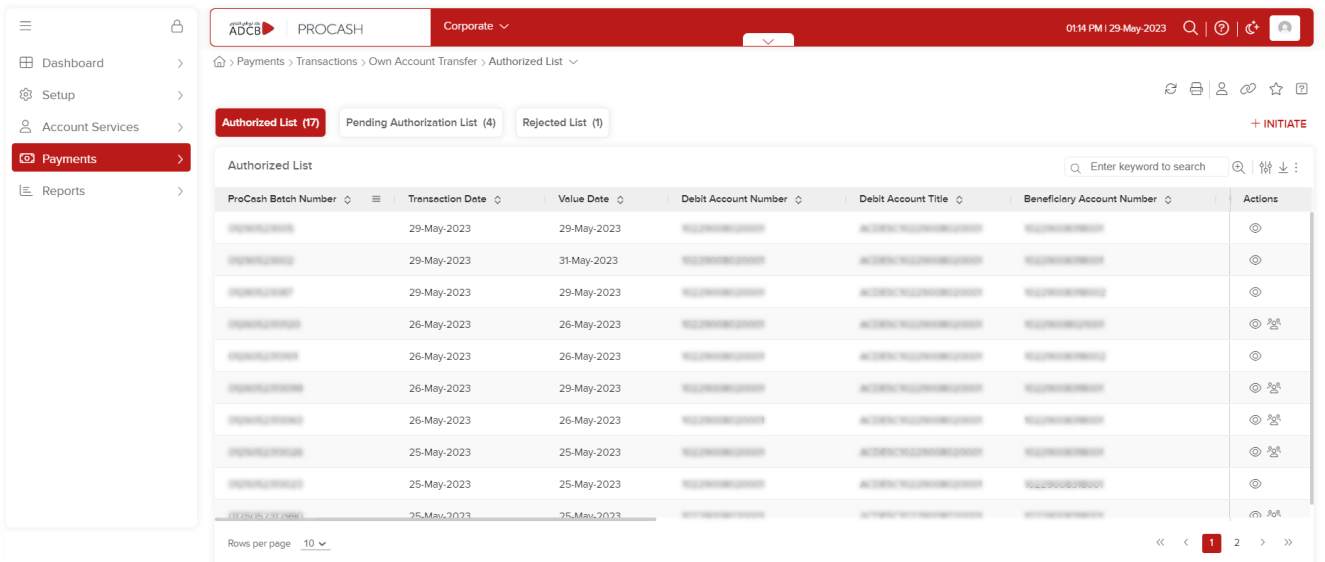


Image 18 – Common features | List

The actions that you can perform on all lists across ProCash are:

- **Re-order the columns by using drag and drop:**

Each column of every list can be re-ordered by using the drag and drop feature. To do this, you must select a column header and drag it while pressing the mouse button. In the example below (Images 19 and 20) the first two columns are being switched via the drag and drop feature

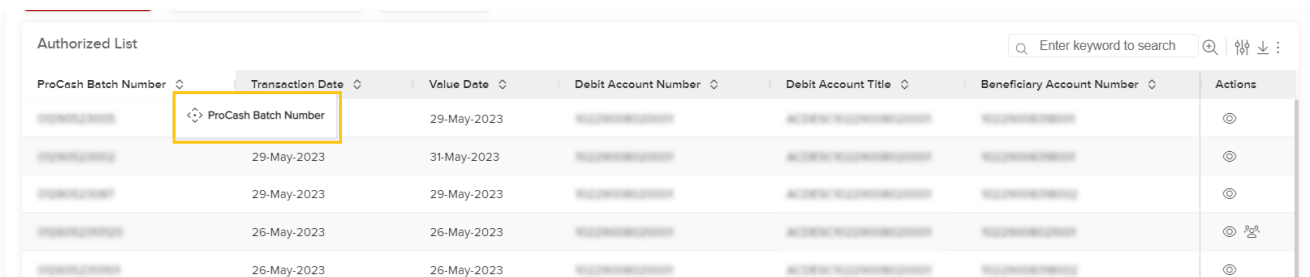


Image 19 – Common features | Drag and drop columns

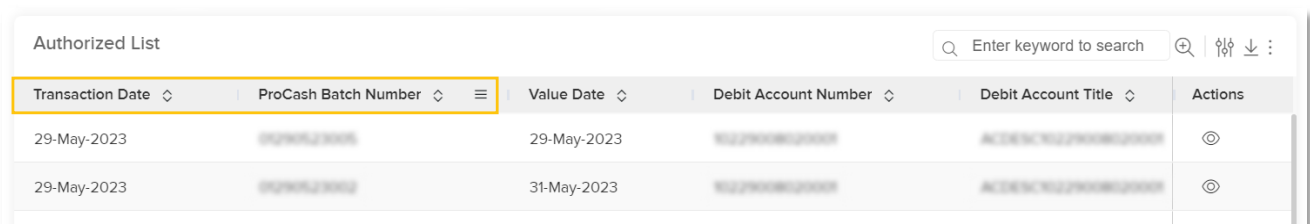


Image 20 – Common features | Columns re-ordering

• **Sort columns:**

To sort columns, you only need to select each column header (Image 21). This can be applied to all table columns

Authorized List						Enter keyword to search	⌵	⌵
Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		

Image 21 – Common features | Sort columns

• **Download table:**

You can download the table in PDF, Excel and text format by selecting the download icon at the top right corner of the table (Image 22). Additionally, you can see all previous downloads by selecting the “View All Downloads” option

Authorized List						Enter keyword to search	⌵	⌵
Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		

Image 22 – Common features | Download table

• **Filter data:**

You can apply filters to your table through these two options:

- Option 1: You can filter a specific column data by selecting a column and then the respective filter icon. In this example, we are filtering a column with date format. For columns with numeric format, the respective filters will apply

Authorized List						Enter keyword to search	⌵	⌵
Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞			
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		
25-May-2023	0000000000	25-May-2023	0000000000	ACDCS0000000000	⊞	👤		

Image 23 – Common features | Filter data

- Option 2: You can filter multiple columns by selecting the filter icon at the top right corner of the table. All column filters are displayed above each column (Images 24 and 25)

Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions
29-May-2023	02050523005	29-May-2023	912290802000	ACDSC912290802000	👁️
29-May-2023	02050523002	31-May-2023	912290802000	ACDSC912290802000	👁️

Image 24 – Common features | Columns filtering 1

Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions
dd/mm/yyyy		dd/mm/yy			
25-May-2023	02050523076	25-May-2023	912290802000	ACDSC912290802000	👁️
25-May-2023	02050523076	25-May-2023	912290802000	ACDSC912290802000	👁️ 🔄
25-May-2023	02050523082	25-May-2023	912290802000	ACDSC912290802000	👁️ 🔄

Image 25 – Common features | Columns filtering 2

• **Search option:**

To search for a specific data, you can type the information you are looking for in the search box at the top right corner of the table. In the given example (Image 30), the user is searching for a specific batch number

Transaction Date	ProCash Batch Number	Value Date	Debit Account Number	Debit Account Title	Actions
25-May-2023	02050523076	25-May-2023	912290802000	ACDSC912290802000	👁️

Image 26 – Common features | Search option

• **PIN columns:**

You can freeze any column on the right or left side of the table by selecting the respective Pin Column option

ProCash Batch Number	Transaction Date	Value Date	Debit Account Number	Debit Account Title	Actions
0200000005	29-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000002	29-May-2023	31-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000007	29-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	🔍 🔄
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000000	26-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	🔍
0200000000	25-May-2023	25-May-2023	9022900000000000	ACCBEN9022900000000000	🔍

Image 27 – Common features | Pin columns

• **Configure table:**

You can configure your table by selecting which columns you want to see. To do so, you have to select the configuration icon at the top right corner of the table, choose which columns you want to make visible, then select “Apply” (Image 28)

ProCash Batch Number	Transaction Date	Value Date	Debit Account Number	Debit Account Title	Beneficiary Account Number	Beneficiary Account Title	Corporate Reference
0200000005	29-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000002	29-May-2023	31-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000007	29-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000000	26-May-2023	29-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000000	26-May-2023	26-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000
0200000000	25-May-2023	25-May-2023	9022900000000000	ACCBEN9022900000000000	9022900000000000	ACCBEN9022900000000000	9022900000000000

Image 28 – Common features | List/table configuration

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