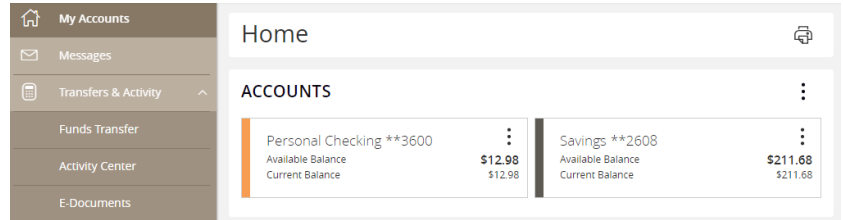
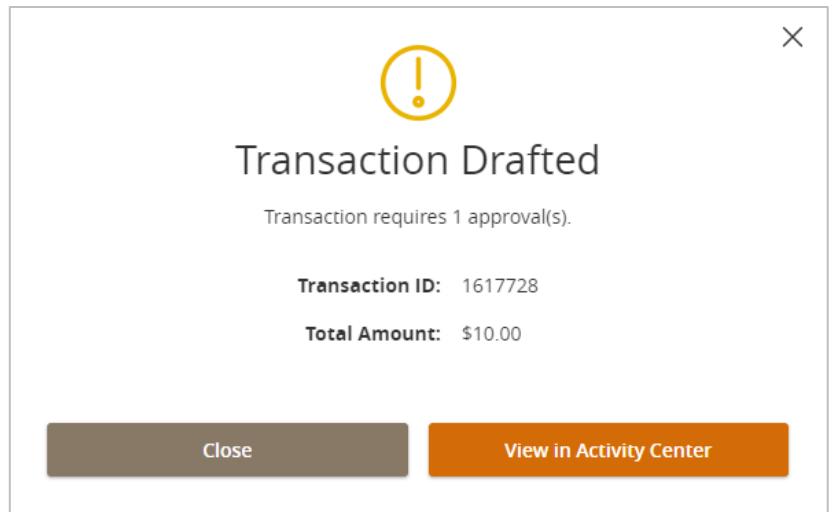


**NOTE:** Activity Center' lists all user activity initiated from within Online Banking. This page can be accessed by selecting the 'Activity Center' option under the 'Transfers & Activity' menu.



**NOTE:** Activity Center' can also be accessed by clicking the 'View in Activity Center' option in the overlay screen generated after drafting or approving a transaction.



## Single Transactions

1. Click the 'Single Transactions' tab on the screen to view one-time online transactions.

Online Activity ⓘ

Single Transactions    Recurring Transactions

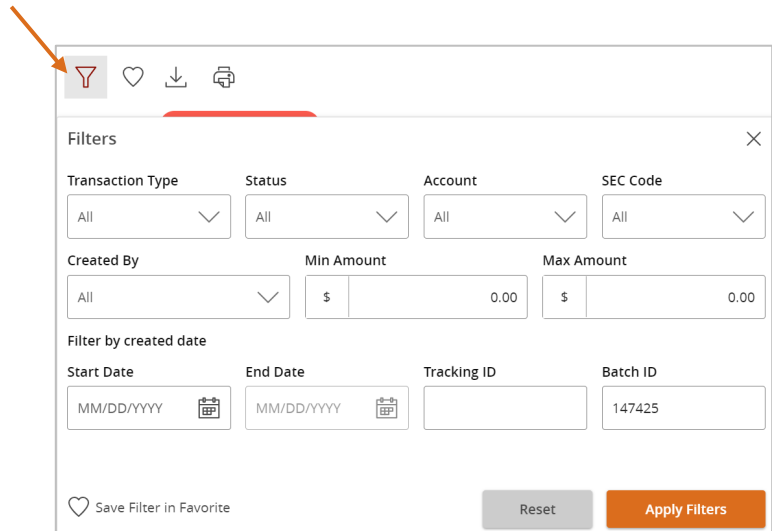
🔍 Search Transactions

Created date	Status	Approvals	Transaction Type	Account	Amount	
8/21/2023 10:12 PM	Drafted	0 of 1	Domestic Wire Tracking ID: 2508978	Commercial Checking xxxxxx2608	\$1.00	☐ ⋮
8/21/2023 3:52 PM	Drafted	0 of 1	ACH Collection Tracking ID: 2508647	Commercial Checking xxxxxx2608	\$0.00	☐ ⋮
3/26/2021 11:06 AM	Drafted	0 of 1	Funds Transfer Tracking ID: 1301201	xxxxxx3600	\$1.00	☐ ⋮
3/26/2021 11:06 AM	Drafted	0 of 1	Funds Transfer Tracking ID: 1301202	Commercial Checking xxxxxx2607	\$2.00	☐ ⋮

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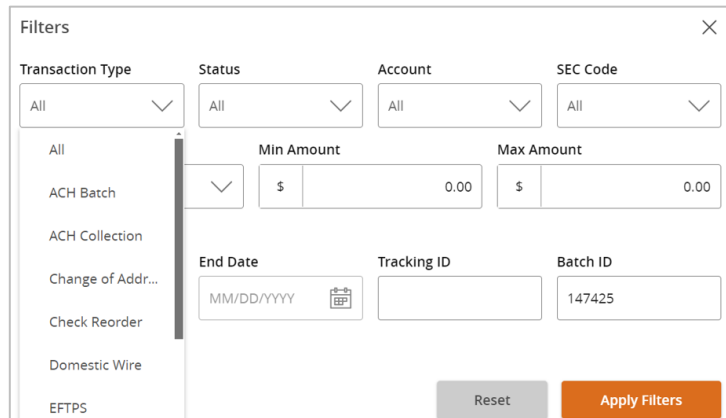
2. Click the filter icon to reveal searchable fields.

a. Collapsed view



3. Search by the available fields to isolate the desired online transactions. Click 'Apply Filters' when the desired search criteria designated.

a. Transaction Type



b. Online Transaction 'Status'

**NOTE:** The following statuses correspond with Online Banking transactions

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- i. Authorized – All approvals have been satisfied. Ready to be processed.
- ii. Cancelled – User has cancelled the online transaction
- iii. Drafted – Additional approval outstanding. Transaction will not be processed.

The screenshot shows the 'Filters' dialog box with the 'Status' dropdown menu open. The menu lists the following options: All, Authorized, Cancelled, Drafted, Failed, Pending, and Processed. The 'All' option is currently selected and highlighted with a blue border. Other filter fields include Transaction Type (All), Account (All), SEC Code (All), Created By (All), Max Amount (0.00), Tracking ID, and Batch ID (147425). There are 'Reset' and 'Apply Filters' buttons at the bottom right.

- iv. Failed – Transaction has been denied.
- v. Pending – Transaction processing has been interrupted
- vi. Processed – Transaction has been completed and can no longer be cancelled.
- vii. Under Review – Transaction will be processed after review.

This screenshot is identical to the one above, showing the 'Filters' dialog box with the 'Status' dropdown menu open and 'All' selected. It includes the same filter fields and buttons.

- c. Account
- d. SEC Code
- e. Created By (which online user initiated the online transaction)
- f. Amount Range
- g. Tracking ID (each online transaction is designated a unique numerical identifier)
- h. Date Range
- i. Tracking ID
- j. Batch ID

The screenshot shows the 'Filters' dialog box with the 'Amount Range' filter expanded. It includes fields for 'Min Amount' (0.00) and 'Max Amount' (0.00), both with a '\$' symbol. Other filter fields include Transaction Type (All), Status (All), Account (All), SEC Code (All), Created By (All), Tracking ID, and Batch ID. There are 'Reset' and 'Apply Filters' buttons at the bottom right.

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- Expand any listed online transaction to view the details in an expanded view by clicking on the transaction.

The screenshot shows the 'Activity Center' interface. On the left is a 'Transaction List' with the following items:

Transaction Type	Amount	Date	Actions
Drafted Domestic Wire	\$10.00	6/30/2024	[Expand]
Drafted Domestic Wire	\$1.00	8/21/2023	[Expand]
Drafted ACH Collection	\$0.00	8/21/2023	[Expand]
Drafted Funds Transfer	\$1.00	3/26/2021	[Expand]
Drafted Funds Transfer	\$2.00	3/26/2021	[Expand]
Drafted Funds Transfer	\$3.00	3/26/2021	[Expand]
Drafted Funds Transfer	\$3.00	3/26/2021	[Expand]
Drafted Funds Transfer	\$4.00	3/26/2021	[Expand]
Drafted ACH Batch	\$1.00	3/24/2021	[Expand]

The expanded view for the first transaction shows the following details:

- TRANSACTION DETAILS:** DOMESTIC WIRE, Geller, David, \$10.00, Tracking ID: 3034225, Created Date: 6/30/2024.
- PAYMENT DETAILS:** (Collapsible section)
- RECIPIENT DETAILS:** (Collapsible section)
- TRANSACTION PROCESS:** A flowchart showing the process from 'Company' to 'Financial Institution' with steps: 1. Drafted (Test User - 6/30/2024 8:37 PM), 2. Approvals (0 of 1 Approvals required), 3. Authorized, 4. Processed.

- Click the caret icon next to 'Payment Details' to display the details of the transaction.

The expanded 'PAYMENT DETAILS' view shows the following information:

<b>Batch ID</b> 147425	<b>From Account</b> Commercial Checking xxxxxx2608
<b>Created By</b> Test User	<b>To Account</b> XXX456
<b>Process Date</b> 07/05/2024	<b>To Account Type</b> Checking
<b>Originator Wire Header</b> Veritex Bank Demo	<b>Purpose Of Wire</b> Sample

- Click the caret icon next to 'Recipient Details' to display the details of each recipient linked to the transaction.

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### RECIPIENT DETAILS ^

Show masked details

Wire Name	Account	Type	Beneficiary FI ID	Amount
Geller, David	XXX456	Checking	XXXXX1118	\$10.00

**Recipient Information**

<b>Wire Name</b> Geller, David	<b>Address</b> 123 Main	<b>City</b> Austin
<b>Email Address</b> david@abc.com		<b>State</b> TX
		<b>ZIP</b> 78777

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**Beneficiary FI**

<b>Name</b> Sample	<b>Address</b> 123 Main	<b>City</b> Austin
<b>Beneficiary FI ID</b> XXXXX1118		<b>State</b> TX
		<b>ZIP</b> 78777

- Click on 'Actions' to unhide a listing of available actions corresponding with the transaction.

## Recurring Transactions

- Click on the 'Recurring Transactions' tab within the 'Activity Center' to view online transactions which are setup to occur in a series.

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### TRANSACTION DETAILS

**DOMESTIC WIRE**  
**Geller, David**  
 Tracking ID: 3034225

**0.00**  
30/2024

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### PAYMENT DETAILS

<b>Batch ID</b> 147425	<b>From Account</b> Commercial Check
<b>Created By</b> Test User	<b>To Account</b> XXX456
<b>Process Date</b> 07/05/2024	<b>To Account Type</b> Checking
<b>Originator Wire Header</b> Veritex Bank Demo	<b>Purpose Of Wire</b> Sample

Online Activity ⓘ

Single Transactions Recurring Transactions

🔍 🔖 📄 🖨️
🔍 Search Transactions

Created date	Status	Approvals	Transaction Type	Account	Amount	
3/24/2021 10:31 AM	Cancelled	N/A	ACH Batch Tracking ID: 1298390	Commercial Checking xxxxxx2607	\$0.00	⋮
9/20/2019 3:24 PM	Drafted	0 of 1	Domestic Wire Tracking ID: 738422	Basic Business Checking	\$10.00	⋮
9/20/2019 10:24 AM	Drafted	0 of 1	Domestic Wire Tracking ID: 738155	Basic Business Checking	\$10.00	⋮
9/19/2019 3:25 PM	Drafted	0 of 1	Domestic Wire Tracking ID: 737849	Basic Business Checking	\$10.00	⋮
9/19/2019 10:23 AM	Drafted	0 of 1	Domestic Wire Tracking ID: 737593	Basic Business Checking	\$10.00	⋮

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