

BUSINESS INSIGHTS

Built Inside Business Digital Banking



A financial intelligence solution designed to help you understand your finances and plan confidently for growth. With automated cash flow forecasting and real-time financial visibility, Business Insights helps you manage day-to-day operations, anticipate future needs, and make informed decisions that move your business forward.

With Business Insights, You Can:

- **See your business performance at a glance.**
View consolidated financial activity in one easy-to-understand dashboard.
- **Forecast cash flow.**
Understand what's coming in and going out so you can plan for upcoming expenses and opportunities.
- **Plan for different scenarios.**
Model events and "what if" situations to see how changes could impact your business.
- **Receive automated insights.**
Get helpful alerts and insights that highlight trends and potential issues.
- **Compare your business to others.**
See how your business stacks up against similar local businesses by size and revenue.

How To Get Started

Activating Business Insights is quick and easy.

1. **Log in.**
Sign in to your Business Digital Banking account.
2. **Select Business Insights.**
Open the **Business Insights** tab within the platform.

If Business Insights is not on your Dashboard,

- 1) Scroll to the bottom of the dashboard
- 2) Click **Organize dashboard**
- 3) Click **+ Add a card**
- 4) Select **Business Insights**
- 5) Click **< Add a card**, then **Done**

3. **Connect your accounting software.**
Follow the onscreen prompts to securely sync your accounting platform (QuickBooks Online, Xero, and FreshBooks).
4. **Explore your insights.**
Once connected, your insights will automatically generate, usually within a few minutes.

Have Questions?

Your banker is here to help. If you have questions or would like assistance getting started, please contact your banker or call 844.836.9722.

Learn more at [BANKEasy.com/BUSINESS-INSIGHTS](https://www.bankeasy.com/BUSINESS-INSIGHTS).

