

CUSTOMIZING YOUR ACCESS

INSTRUCTIONAL GUIDE

BAKER



BOYER

Member FDIC

CONTENTS

How to Edit Your Accounts View in Your Dashboard	1
How to Add a Dashboard Card	2
Customizing Your Profile & Account Settings	3



CUSTOMIZING YOUR ACCESS

How to edit your dashboard accounts view

1

To edit your dashboard Accounts view, click the ellipses (...)

2

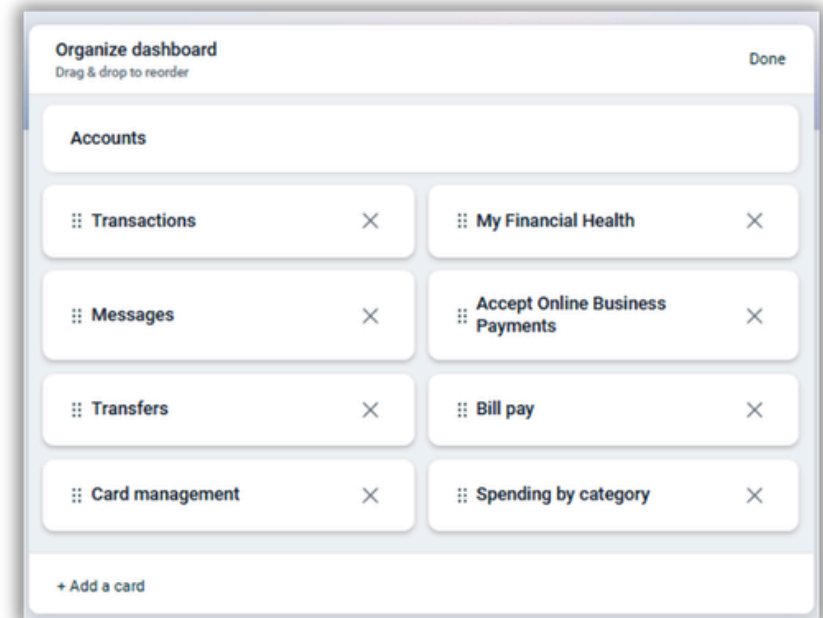
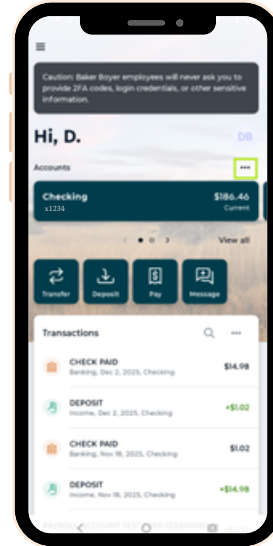
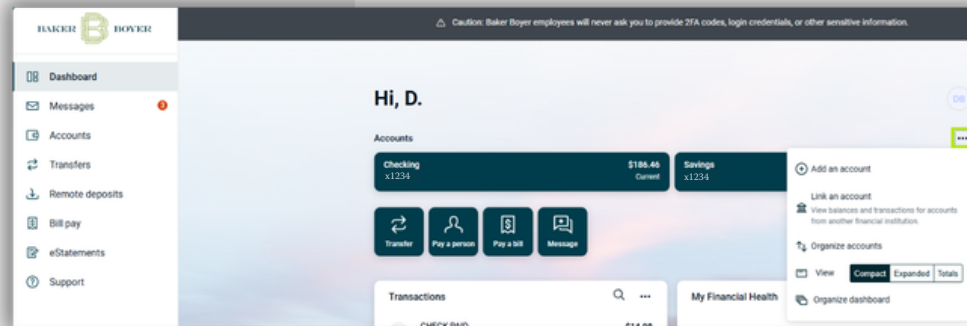
In the dropdown, you can:

- Add or link accounts
- Click “Compact,” “Expanded,” or “Totals” to change your view and adjust your screen space
- Click “Organize Dashboard” to customize your “cards” (the white tiles below Accounts)

3

After clicking “Organize Dashboard” you can:

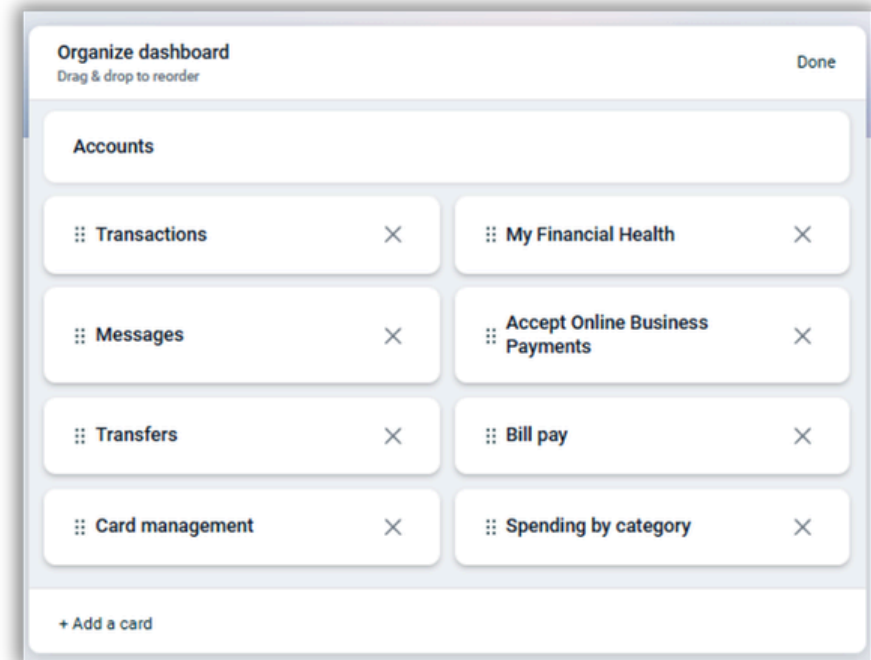
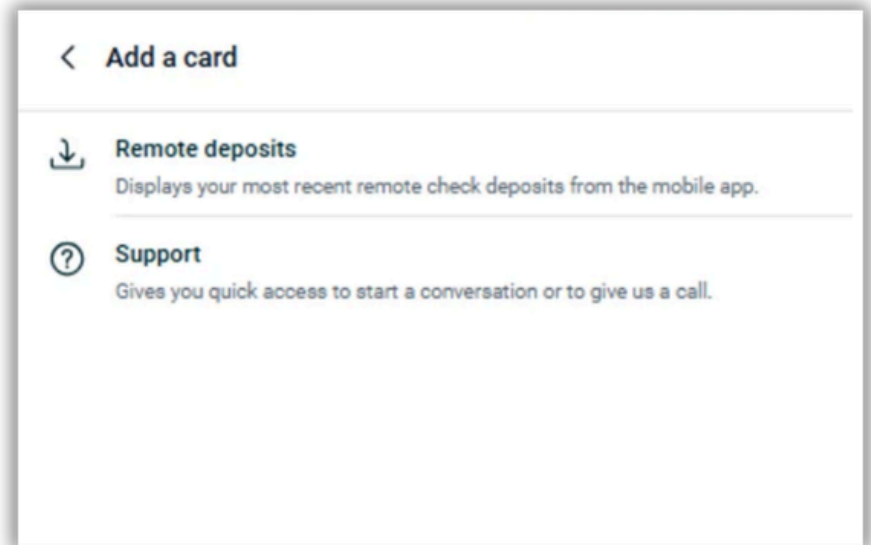
- Drag to rearrange
- Click “X” to remove cards
- Click “+ Add a card” for more (see below)
- Click “Done” to save



CUSTOMIZING YOUR ACCESS

How to add a dashboard card

- 1 Click “+ Add a Card”
- 2 Select the card you’d like to add. Click “Support” if you need personal banker assistance with the feature.
- 3 Click the back arrow and drag the cards into your preferred arrangement.
- 4 Click “Done” to save.

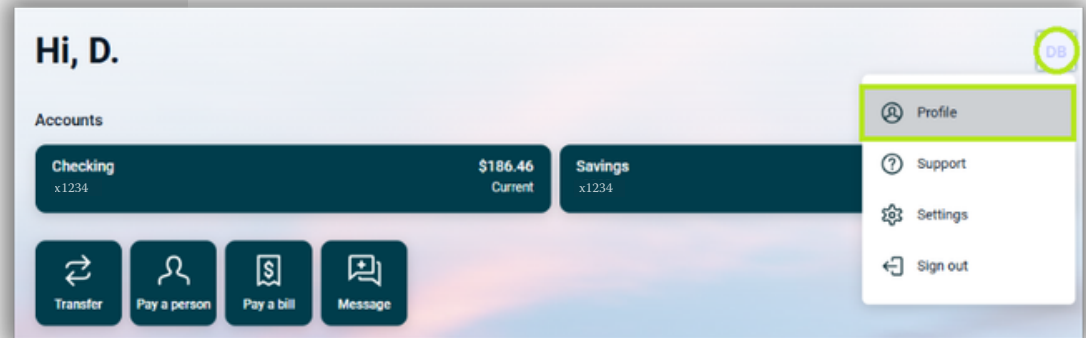


CUSTOMIZING YOUR ACCESS

Customizing your profile and account settings

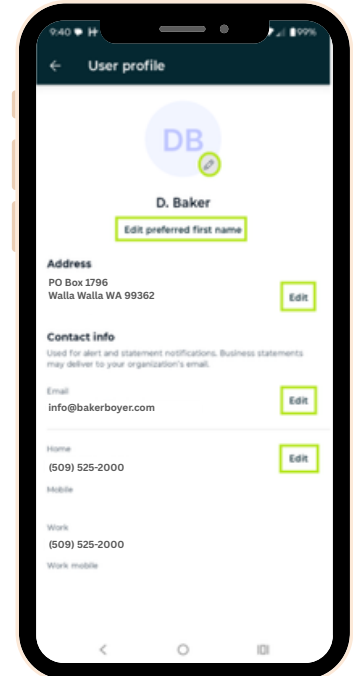
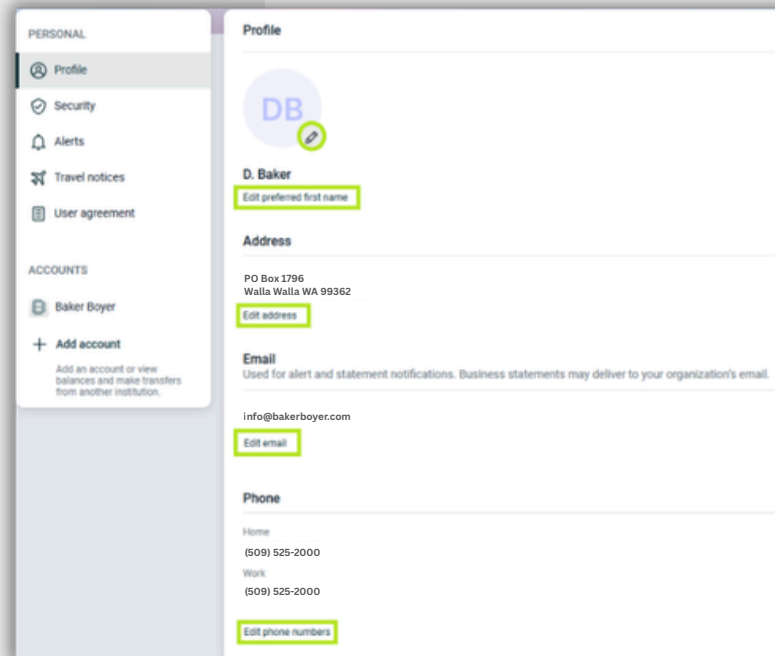
1

Click the profile icon in the upper right corner and select “Profile.”



2

Click on the pencil icon to change your icon picture. You can also edit your preferred name (for conversations with bankers) and your contact information.



CUSTOMIZING YOUR ACCESS

Customizing your profile and account settings

3

To change which of your accounts display balances and transactions, click on Baker Boyer then the account you want to change.

4

To change the display for each account, switch the toggles on or off. The effects of the display change will be listed below.

5

Click “Rename” in the upper right-hand corner to rename this account.

6

Click “+ Add alert” to add balance and transaction alerts for this account.

Note: For more detailed instructions on setting up Account Alerts, [please view this instructional guide](#).

