

CUSTOMIZING YOUR DASHBOARD AND ACCOUNT DISPLAY

INSTRUCTIONAL GUIDE

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CUSTOMIZING YOUR DASHBOARD

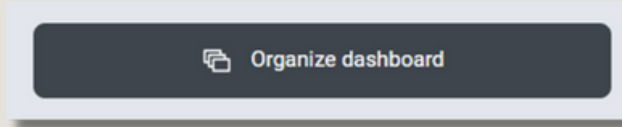
Customizing your online banking dashboard puts the tools and information you use most right at your fingertips—so you can manage your money faster, easier, and your way.

Step 1: From the Menu (located on the left), select Dashboard.

Step 2: Scroll to the bottom.

Step 3: Click 'Organize Dashboard.'

- Note: if you are using an Android Device, you can also press and hold any of the sections until the option to reorganize appears.



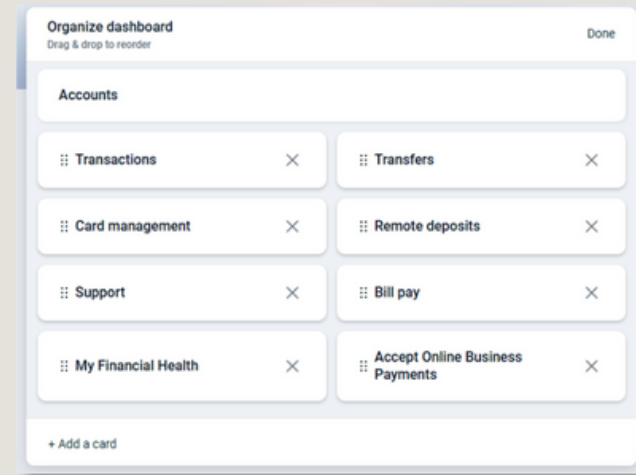
Step 4: Adjust as needed, based on your preferences.

Step 5: Note a card is a section (example: transactions, bill pay, transfers, etc.).

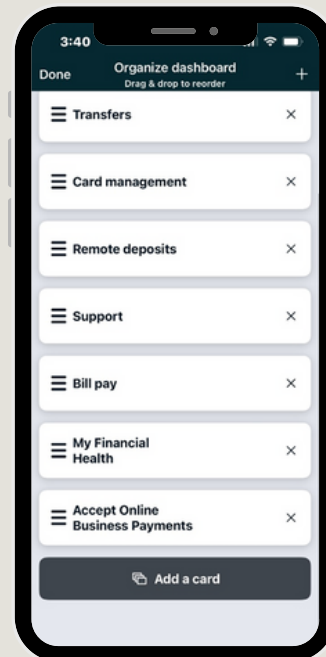
- To add sections, tap Add a Card and select the new card
- To remove sections, click on the X located on the right.
- To re-order sections, click and drag.

Step 6: After all adjustments are made, click Done.

Browser:



Mobile:



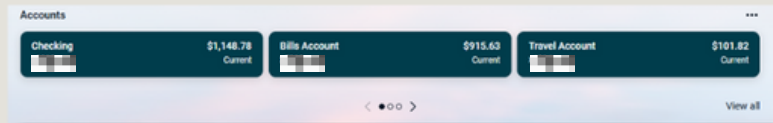
CUSTOMIZING ACCOUNT DISPLAY

Adjusting your account display lets you organize your finances in a way that makes sense to you—so you can quickly find what you need and stay on top of your money.

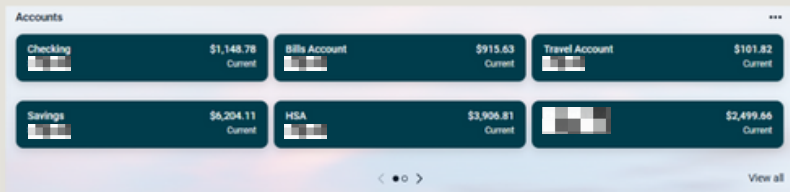
Step 1: From your Dashboard, click on the 3 dots located on the right.

Step 2: Adjust as needed, based on your preferences.

- Organize Accounts - use this option to re-arrange the order that your accounts appear in by clicking and dragging.
- View - Use this option to adjust how your accounts are displayed
 - Compact - A condensed view. Example below:



- Expanded - A full view. Example below:



- Totals - A summary view. Example below:

Account totals			
Cash	\$19,101.35	Borrowed	\$181,848.16
7 accounts	Balance	1 account	Balance

Browser:



Mobile:

