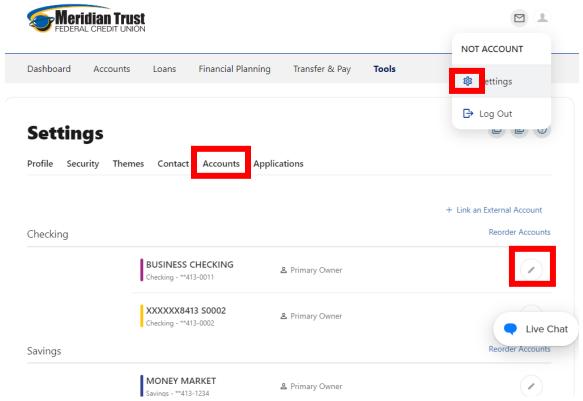


Customize Your Dashboard

Nicknames and Color Coding

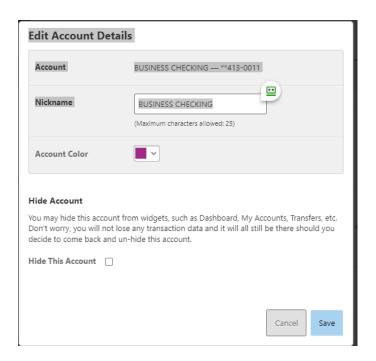
Changing the share/loan nicknames can be completed in two different locations

- 1) The settings feature
- 2) The account details/transaction history page.
- Settings Feature
 Select Settings from the user drop down menu.

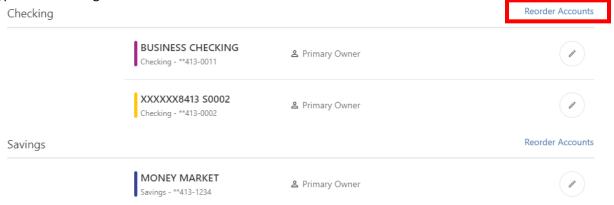


Enter a Nickname and/or select an account color to aid in identifying the account

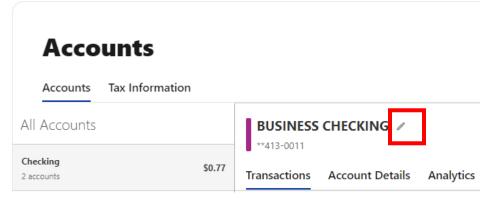




Accounts can also be reorganized in this setting by clicking on Reorder accounts and clicking and dragging to the order you wish to view them. They must be organized by the account type (checking, savings, loans, investments, ach accounts, external accounts) but the order within the type can be changed.

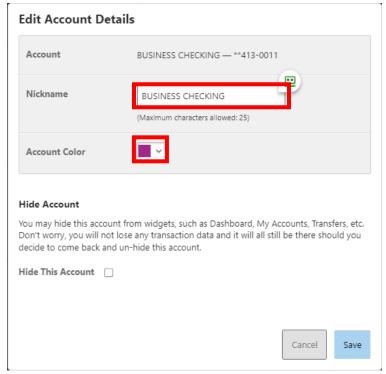


Account Details/Transaction History
 Select the share from the dashboard or account tab by clicking on it





Enter a Nickname and/or select an account color to aid in identifying the account.



Hide Accounts from Dashboard View

Accounts can be removed from view in the dashboard by clicking the settings icon

Dashboard





Dashboard Settings

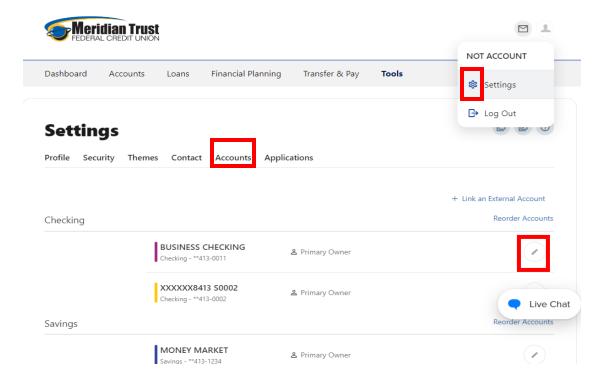
Accounts

Choose the accounts you'd like to appear on your dashboard. You must select at least one account.

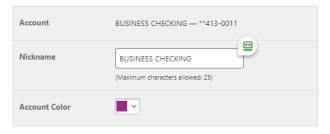
Checking BUSINESS CHECKING **413-0011 XXXXXXX8413 S0002 **413-0002 Savings MONEY MARKET **413-1234 HOLIDAY CLUB **413-0039 HSA **413-0024 Cancel Save

Hide Accounts from Dashboard, Accounts, and Transfers Widget Views Select Settings from the user drop down menu.





Click the check box next to Hide Account Edit Account Details



Hide Account

You may hide this account from widgets, such as Dashboard, My Accounts, Transfers, etc. Don't worry, you will not lose any transaction data and it will all still be there should you decide to come back and un-hide this account.

Hide This Account



Save