



## 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.
- 1) Settings Feature  
Select Settings from the user drop down menu.

The screenshot shows the Meridian Trust user interface. At the top, the Meridian Trust logo is on the left, and user icons (mail and profile) are on the right. Below the logo is a navigation bar with links: Dashboard, Accounts, Loans, Financial Planning, Transfer & Pay, and Tools. A user dropdown menu is open on the right, showing 'NOT ACCOUNT', a gear icon for 'Settings' (highlighted with a red box), and a 'Log Out' button. Below the navigation bar, the 'Settings' page is displayed. It has sub-tabs: Profile, Security, Themes, Contact, Accounts (highlighted with a red box), and Applications. Under the 'Accounts' tab, there are sections for 'Checking' and 'Savings'. In the 'Checking' section, two accounts are listed: 'BUSINESS CHECKING' (Checking - \*\*413-0011) and 'XXXXXX8413 S0002' (Checking - \*\*413-0002). Both are owned by 'Primary Owner'. A red box highlights the edit icon (pencil) next to the 'BUSINESS CHECKING' account. In the 'Savings' section, one account is listed: 'MONEY MARKET' (Savings - \*\*413-1234), also owned by 'Primary Owner'. A red box highlights the edit icon (pencil) next to this account. On the right side of the account list, there are links for '+ Link an External Account', 'Reorder Accounts', and a 'Live Chat' button.

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

### Edit Account Details

Account


BUSINESS CHECKING — \*\*413-0011

Nickname

BUSINESS CHECKING

(Maximum characters allowed: 25)

Account Color



#### 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

☐

Cancel

Save

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.

Checking

[Reorder Accounts](#)

**BUSINESS CHECKING**  
Checking - \*\*413-0011

 Primary Owner



**XXXXXX8413 S0002**  
Checking - \*\*413-0002

 Primary Owner



Savings

[Reorder Accounts](#)

**MONEY MARKET**  
Savings - \*\*413-1234

 Primary Owner



## 2) Account Details/Transaction History

Select the share from the dashboard or account tab by clicking on it

## Accounts

Accounts

Tax Information

All Accounts


Checking

2 accounts

\$0.77

BUSINESS CHECKING

\*\*413-0011



Transactions

Account Details

Analytics



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

**Edit Account Details**

Account

BUSINESS CHECKING — \*\*413-0011

Nickname

BUSINESS CHECKING

(Maximum characters allowed: 25)

Account Color

**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 ☐

Cancel

Save

## Hide Accounts from Dashboard View

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

## Dashboard

Accounts



Checking	\$0.77
<div><div>BUSINESS CHECKING</div><div>**413-0011</div></div>	<div><div><div>A</div><div>\$0.00</div></div><div>\$0.00</div><div>&gt;</div></div>
<div><div>XXXXXX8413 S0002</div><div>**413-0002</div></div>	<div><div><div>A</div><div>\$0.77</div></div><div>\$0.77</div><div>&gt;</div></div>

## 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



XXXXXX8413 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.

[Dashboard](#) [Accounts](#) [Loans](#) [Financial Planning](#) [Transfer & Pay](#) **Tools**

NOT ACCOUNT

Settings

Log Out

## Settings

[Profile](#) [Security](#) [Themes](#) [Contact](#) **Accounts** [Applications](#)

+ Link an External Account

Reorder Accounts

Checking

BUSINESS CHECKING

Checking - \*\*413-0011

Primary Owner

XXXXXX8413 50002

Checking - \*\*413-0002

Primary Owner

Savings

MONEY MARKET

Savings - \*\*413-1234

Primary Owner

Click the check box next to Hide Account

### Edit Account Details

Account	BUSINESS CHECKING — **413-0011
Nickname	<input type="text" value="BUSINESS CHECKING"/> <small>(Maximum characters allowed: 25)</small>
Account Color	<div><div></div></div>

### 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 ☐

[Cancel](#) [Save](#)