

Customize Your Dashboard

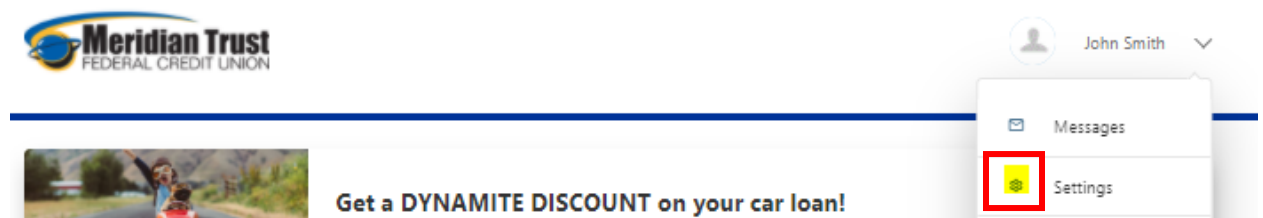
Nicknames and Color Coding

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

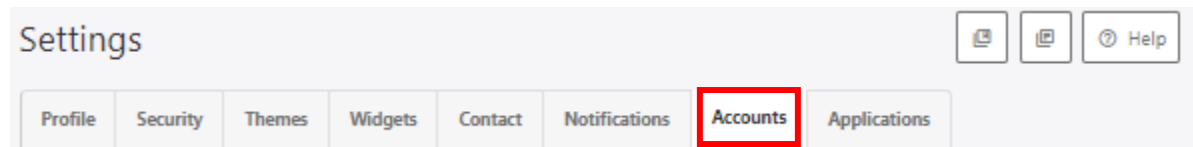
- 1) The settings feature
- 2) The account details/transaction history page.

1) Settings Feature

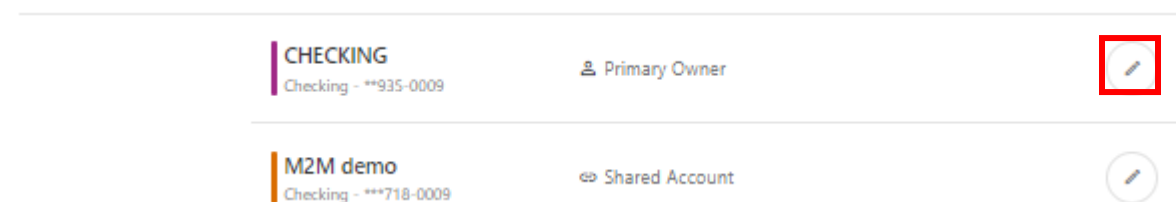
Select Settings from the user drop down menu.



Select the accounts tab



Click the pencil icon to edit the account details.



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

Edit Account Details

Account	CHECKING — **935-0009
Nickname	<input type="text" value="CHECKING"/> <small>(Maximum characters allowed: 25)</small>
Account Color	<input type="color" value="#663399"/>

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

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.

ACH Accounts
Reorder Accounts

<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #007bff; padding-left: 5px;"> Demo test <small>ACH Accounts - **7654</small> </div> <div style="margin-left: 20px;"> External OPEN </div> <div style="margin-left: 20px;"> ✎ 🗑️ </div> </div>
<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #007bff; padding-left: 5px;"> demo test 2 <small>ACH Accounts - *****4321</small> </div> <div style="margin-left: 20px;"> External OPEN </div> <div style="margin-left: 20px;"> ✎ 🗑️ </div> </div>

2) Account Details/Transaction History

Select the share from the Dashboard or Accounts Widget by clicking on it

Accounts
⚙️

Checking	\$2,821.73
<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #663399; padding-left: 5px;"> CHECKING <small>**935-0009</small> </div> <div style="margin-left: 20px;"> 🔔 </div> <div style="margin-left: 20px;"> A \$2,821.73 \$2,821.73 </div> <div style="margin-left: 10px;"> > </div> </div>	
Savings	\$10,390.00
<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #007bff; padding-left: 5px;"> HOLIDAY CLUB <small>**935-0039</small> </div> <div style="margin-left: 20px;"> A \$1,024.83 \$1,049.83 </div> <div style="margin-left: 10px;"> > </div> </div>	
<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #800000; padding-left: 5px;"> VACATION <small>**935-0006</small> </div> <div style="margin-left: 20px;"> A \$3,253.85 \$3,253.85 </div> <div style="margin-left: 10px;"> > </div> </div>	
<div style="display: flex; align-items: center;"> <div style="border-left: 2px solid #007bff; padding-left: 5px;"> MONEY MARKET </div> <div style="margin-left: 20px;"> A \$4,056.07 </div> <div style="margin-left: 10px;"> > </div> </div>	

Click the pencil icon next to the account in the details screen



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

Edit Account Details

Account	CHECKING — **935-0009
Nickname	<input type="text" value="CHECKING"/> <small>(Maximum characters allowed: 25)</small>
Account Color	<input type="color" value="#663399"/>

Hide Account

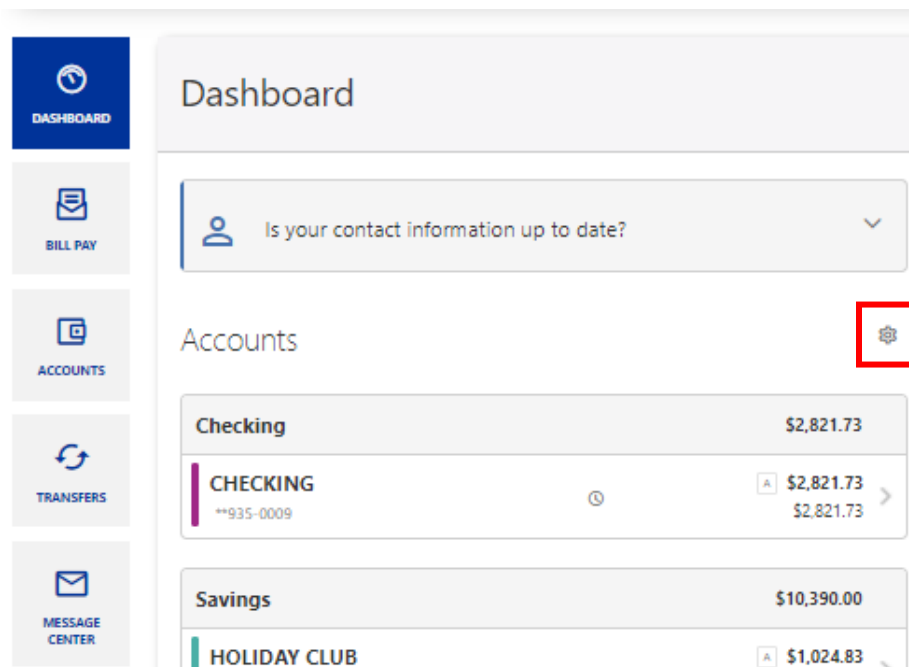
You may hide this account from widgets, such as Dashboard, My Accounts, Transfers, etc. Don't worry, you will not lose any transaction data and it will all still be there should you decide to come back and un-hide this account.

Hide This Account

Hide Accounts from Dashboard Widget View

Accounts can be removed from view in the dashboard widgets

From the Dashboard, click the *Settings* icon



The dashboard shows a sidebar with navigation icons for Dashboard, Bill Pay, Accounts, Transfers, and Message Center. The main content area is titled 'Dashboard' and includes a contact information check, an 'Accounts' section with a settings gear icon, and a list of accounts with their current balances.

Account Name	Balance
Checking	\$2,821.73
CHECKING **935-0009	\$2,821.73
Savings	\$10,390.00
HOLIDAY CLUB	\$1,024.83



Uncheck the box next to the shares/loans you wish to be hidden from the dashboard widget. They will still show in the accounts widget and in transfers.

Dashboard Settings

Accounts

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

Checking

■ CHECKING **935-0009

Savings

■ HOLIDAY CLUB **935-0039

■ VACATION **935-0006

■ MONEY MARKET **935-0004

■ SAVINGS **935-0001

■ HOLIDAY CLUB **935-0002

■ MONEY MARKET **935-0003

Loans

■ 2019 FORD EXPLORER **935-0016

■ 2019 CHEVROLET TRAVERSE **935-0013

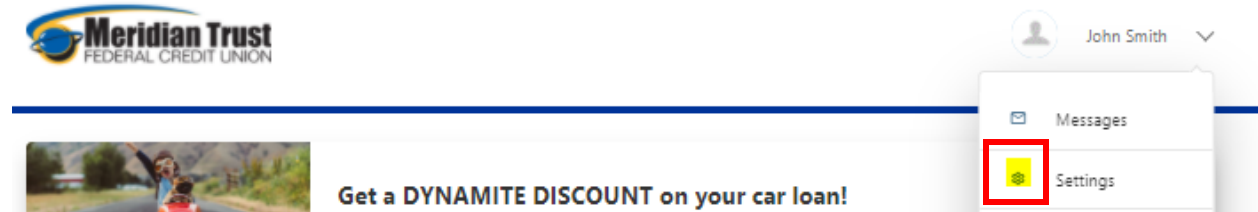
Credit Cards

■ VISA PLATINUM **935-0007

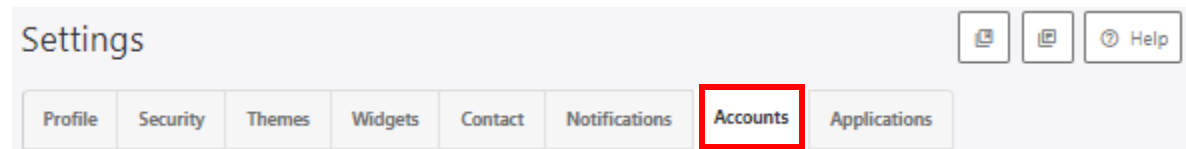
Mortgages

■ 30 YR IN HOUSE MORTGAGE **935-0015

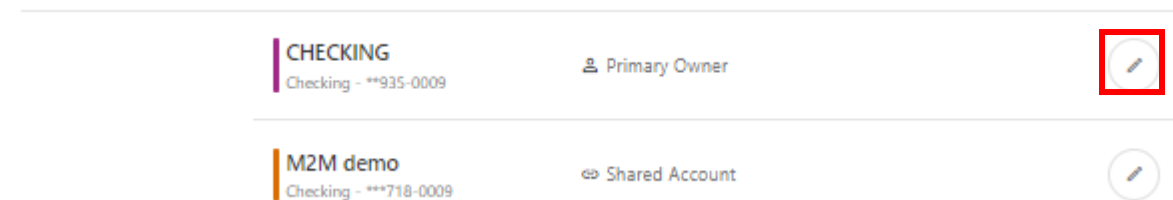
Hide Accounts from Dashboard, Accounts, and Transfers Widget Views
Select Settings from the user drop down menu.



Select the accounts tab




Click the pencil icon to edit the account details.



Click the check box next to Hide Account

Edit Account Details

Account	CHECKING — **935-0009
Nickname	<input type="text" value="CHECKING"/>  <small>(Maximum characters allowed: 25)</small>
Account Color	<input type="checkbox" value="purple"/>

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