Online Banking Dashboard Maintenance

Adding a Widget to Dashboard

1. On the welcome page of your online banking, select Display Options. (⚙ Display Options)
2. Click the plus icon (+) in the right-hand corner.
3. A menu of the available short cut widgets will appear. Select the one you would like to add to your welcome screen dashboard.
4. The widget will be added to a preview to give you the opportunity to click and drag widgets to your desired location. You can also delete widgets that are no longer needed by selecting the trash bin icon (🗑).
5. Once you have arranged the widgets to your liking, click the save icon (Save) to publish changes to your welcome screen.

Add Account(s) to Dashboard

1. On the welcome page of your online banking, find the Important Account Balances widget. Select Edit Accounts Displayed. (⚙ Edit Accounts Displayed)
2. Your accounts will be organized by account types (checking, savings, loan etc.) Each account type will have its own tab. Select the appropriate tab for the account you are adding and then click in the account field.

Choose Account

Account
Select All Accounts ▾

3. Select all the accounts you would like displayed and they will be added to the right under "Order Accounts." You can click and drag the selected account to arrange in the order of your preference. Then click the Save icon (Save). Repeat steps 2 & 3 for all account types that should be added.
   a. Note: You may select up to seven accounts for each account type. If you have more than seven accounts you would like displayed, you will need to add an additional widget. See "Adding a Widget" section for reference.