

how to:

dashboard customization

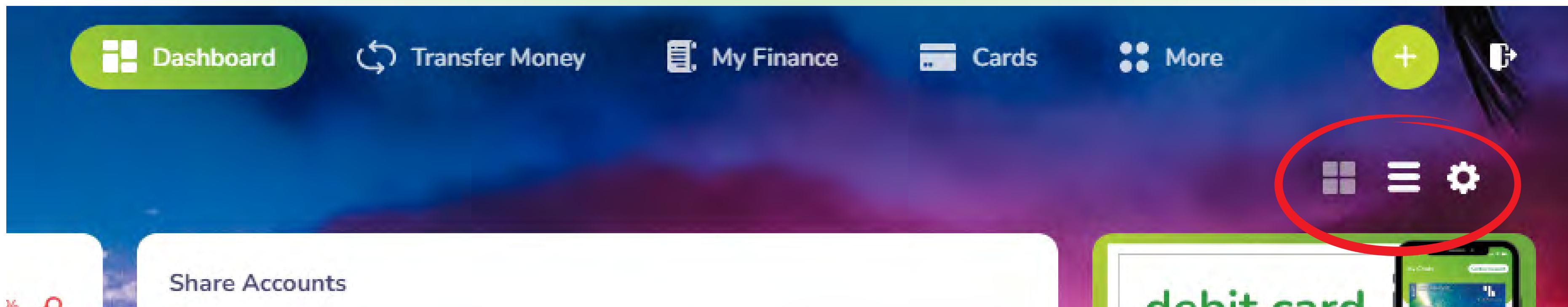
Online

Overview:

- **Create Groups**
- **Change Dashboard View (List or Tile)**
- **Change Profile Picture**
- **Create Account Nicknames**

What is Dashboard Customization?

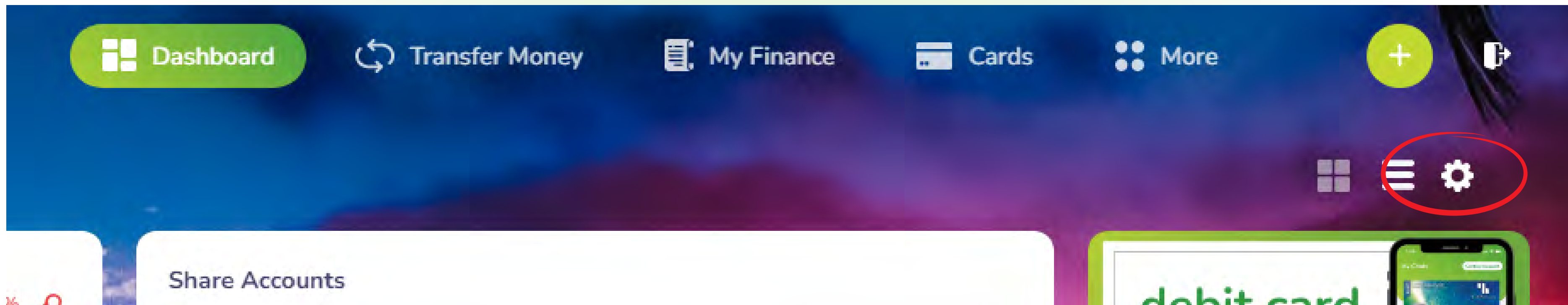
Organize your dashboard and accounts



Create Groups

Step 1:

Select **Gear icon**  (top right - 'Dashboard Customization')



Create Groups

Step 2:

Select "Create a New Group"

Dashboard Customization

Accounts

Create a New Group

Other Accounts

Create Groups

Step 3:

Type a group name.

Select accounts you want to add.

Click "Create Group"



Create a New Group

Group Name

Group Color Green Blue Orange Light Blue Red

Select accounts you want to add

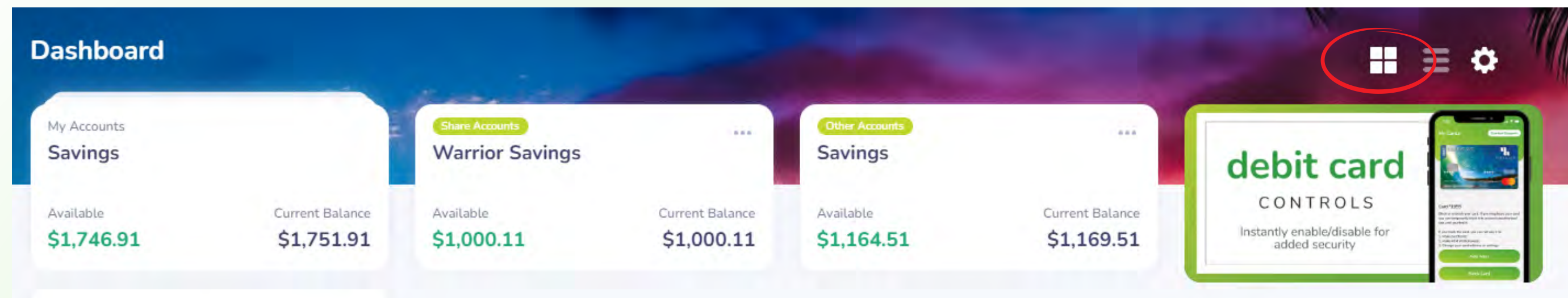
<input type="radio"/>	Account Name	Account Number	Available	Balance	
<input type="radio"/>	Checking		\$340.06	\$340.06	
<input type="radio"/>	2022 Toyota Tacoma		\$0.00	\$11,263.18	
<input type="radio"/>	Savings		\$0.00	\$5.00	
<input type="radio"/>	Credit Card Cash Back		\$500.00	\$0.00	

0 accounts selected

Dashboard View: Tile or List

Click on **Tile View**  or **List View**  (top right)

Tile View



Dashboard

My Accounts Savings

Available **\$1,746.91** Current Balance **\$1,751.91**

Share Accounts Warrior Savings

Available **\$1,000.11** Current Balance **\$1,000.11**

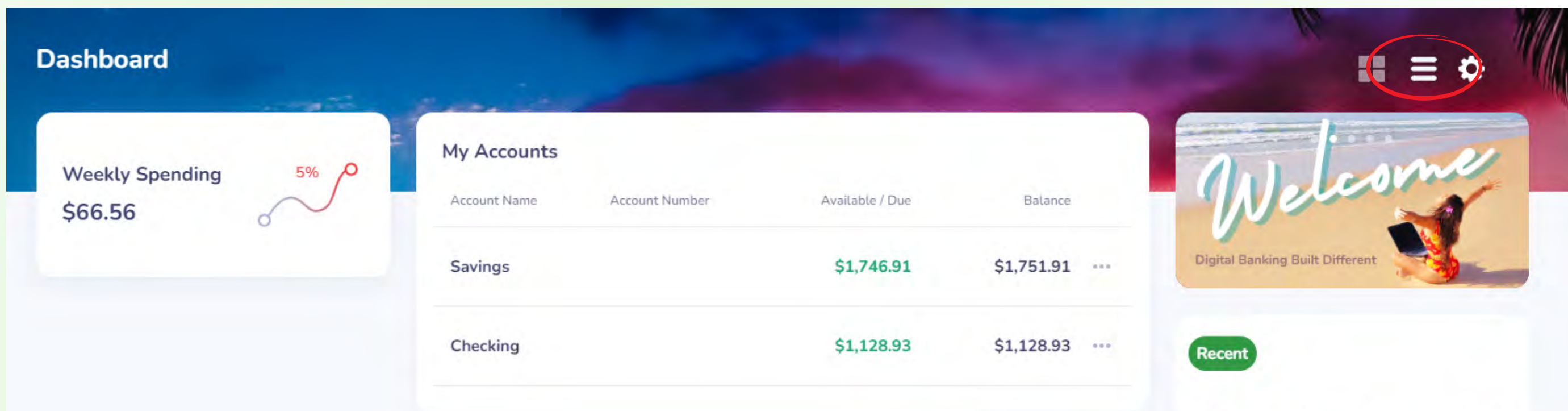
Other Accounts Savings

Available **\$1,164.51** Current Balance **\$1,169.51**

debit card CONTROLS

Instantly enable/disable for added security

List View



Dashboard

Weekly Spending **\$66.56** 5%

My Accounts

Account Name	Account Number	Available / Due	Balance
Savings		\$1,746.91	\$1,751.91 ...
Checking		\$1,128.93	\$1,128.93 ...

Welcome

Digital Banking Built Different

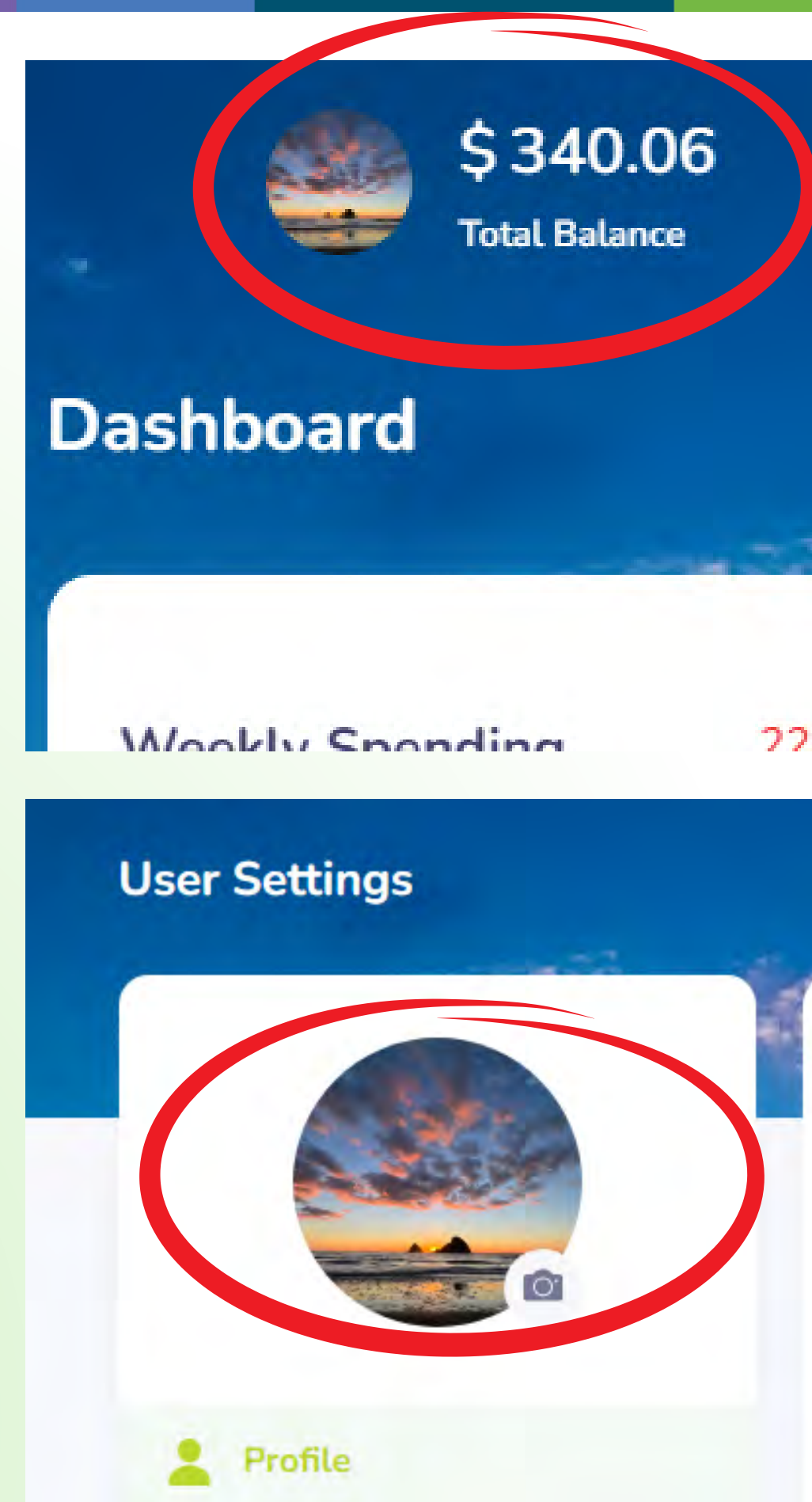
Recent

Profile Picture

Click on the circle image (top left)

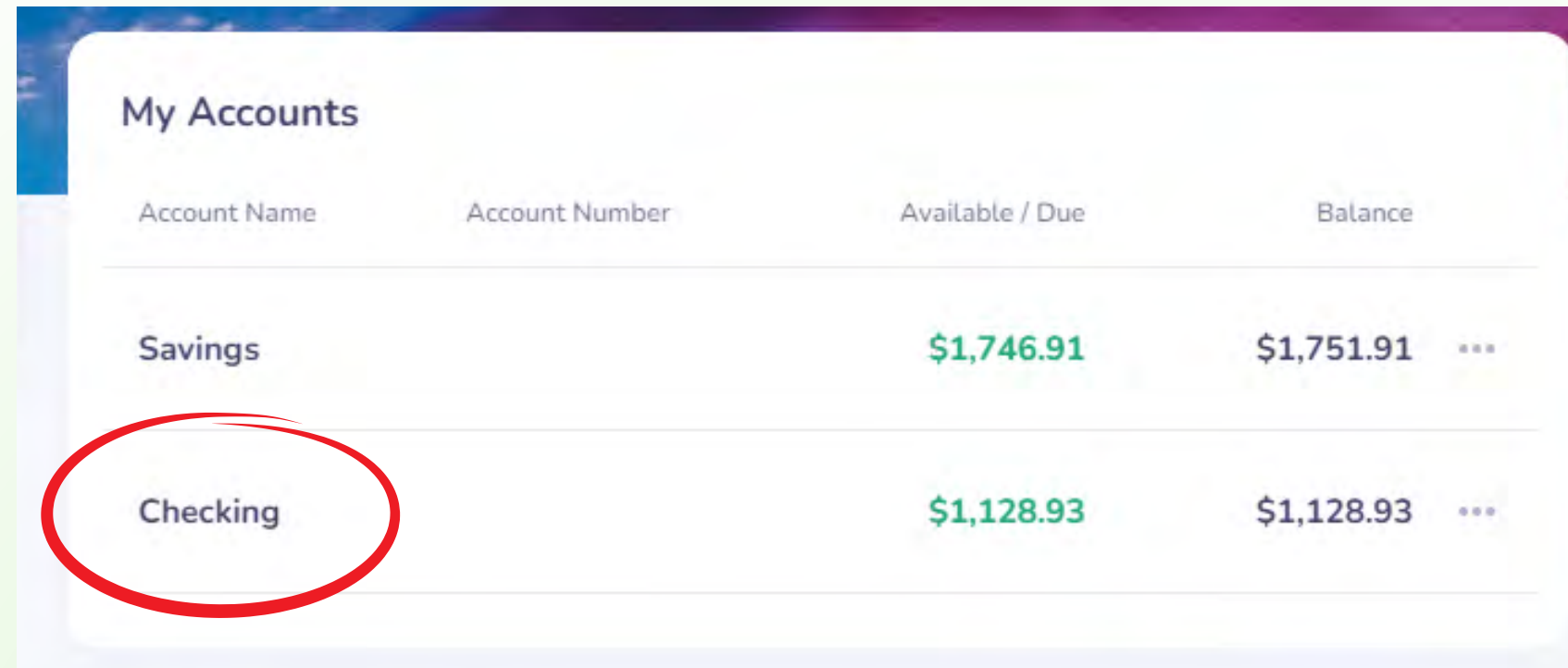
Under User Settings,
click on **Camera icon**

Select an image from your
computer / mobile phone



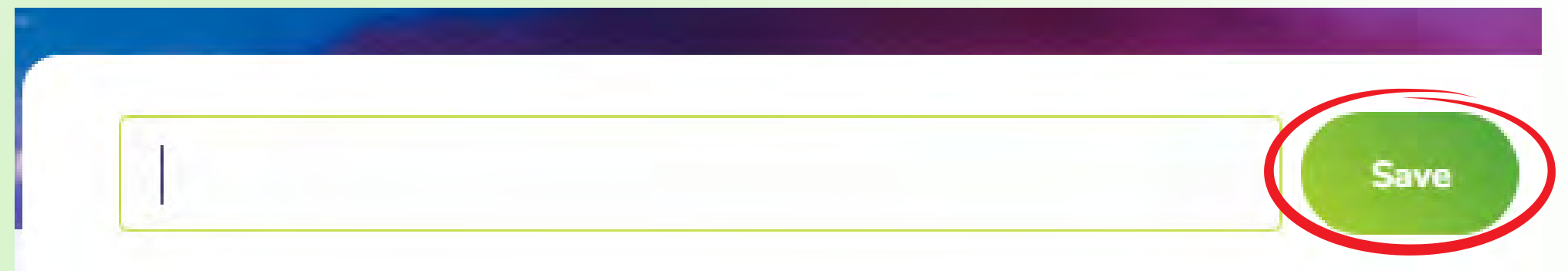
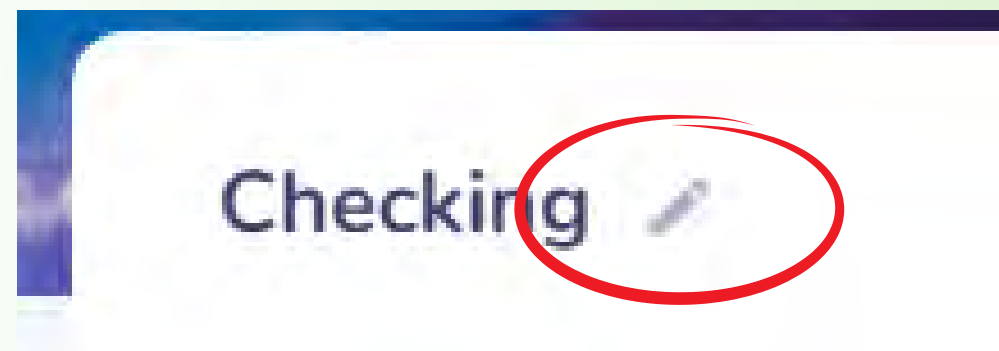
Account Nicknames

From your Dashboard, select the account you want to edit



Account Name	Account Number	Available / Due	Balance
Savings		\$1,746.91	\$1,751.91
Checking		\$1,128.93	\$1,128.93

Click on the **Pencil icon**  to edit your Account Nickname, then click **"Save"**



Pau!

