

SETTING UP YOUR DASHBOARD

Use the **Dashboard** menu to view your accounts, news items, favorite reports, payments pending approval, and other available widgets.

Adjust the layout by selecting **Configure Dashboard** in the top-right corner of the Dashboard. You can add, remove, edit, resize, and drag widgets to customize the Dashboard to work best for you.

DASHBOARD	ACCOUNTS -	PAYMENTS - REPORTING - ADMIN -
		Configure Dashboard
nce you clicke DASHBOARD	ed Configure Da	Ashboard, select Add Widget PAYMENTS - REPORTING - ADMIN -
		Add Widget Save Cancel
elect each Wid dd a Widget	dget to customize	e your Dashboard and click Add Widgets
elect a widget to add to your a	ccount.	
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	Remove Widget	Add Widget
Stop Requests Pending Approval		
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Add Widgets Cancel		

NOTE: You must add Accounts Widget to your Dashboard to view accounts in the mobile app.

You can click, drag and/or resize your widgets in the format you choose My Dashboard

	Ir
Accounts	💼 Remove widget
🗢 Group One (0)	Group available balance: \$0.00
No accounts assigned to this group. Click Manage Groups to delete, rename, or add accounts to this group.	
© Group Two (0)	
You can change the position of this widget by dragging and dropping.	
This widget can be resized by using the 🖋 icon in the bottom right corner.	

Once you have your Dashboard customized, click Save

DASHBOARD	ACCOUNTS -	PAYMENTS -	REPORTING -	ADMIN 🔻
		Add Wi	idget Save	Cancel

Accounts

Upon initial login, two account groups appear by default. No accounts appear until you assign accounts to the groups by selecting **Manage Groups**. You can also edit the group names and add or remove groups.

My Dashboard		
Accounts Anage Groups		
Group One (0) No accounts assigned to this group. Click Manage Groups to delete, r	ename, or add accounts to this gro	oup.
Group Two (0)		
No accounts assigned to this group. Click Manage Groups to delete, r	ename, or add accounts to this gro	oup.
Once you click Manage Groups , you will be prom		×
Once you click Manage Groups , you will be prom Manage Account Groups	npted to Add Accounts	×
Once you click Manage Groups , you will be prom Manage Account Groups	npted to Add Accounts	×
Once you click Manage Groups, you will be prom Manage Account Groups Type to filter Q You can create up to 20 groups to display in the widget. Each group can have a maximum	npted to Add Accounts Create New Gro	×

Done

Rename your Group by clicking the edit icon

Rename Group

	Group Name: *	Checking Accounts
🖨 Group One (6) 🖋	Rename Group	Cancel

Click **Done** to save your changes

Done

For further instruction on how to use additional Online Banking features, please refer to the **Treasury Complete Guide** or contact **Professional Services** at <u>professionalservices@linkbank.com</u>