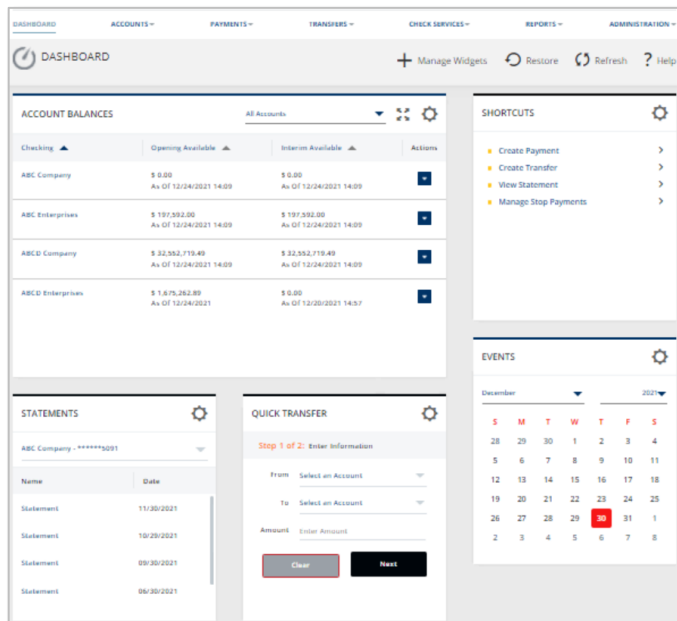


DASHBOARD

Treasury Internet Banking's dashboard acts as a landing screen that provides a high-level view of your financial information. The customizable dashboard allows you to manage simple tasks in order to enhance your banking experience. You can customize the dashboard view and create shortcuts for frequently used tasks to match your requirements.

You can view account balances, statements, calendar events, foreign exchange rates, and even initiate transfers through a single page.



DASHBOARD DEFAULT VIEW

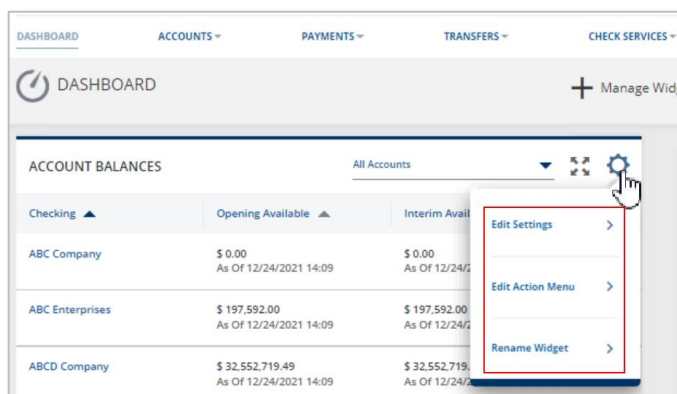
The Bank provides a default layout of the Dashboard view.

You can customize the *Dashboard* screen by adding frequently used widgets.

These widgets can be edited, added, removed, moved, renamed, expanded, or collapsed as per your personal preference.


The *Account Balances* widget is always present on the *Dashboard* and provides a synopsis of your accounts.

By default, all accounts are displayed on the *Account Balances* widget. You can change the widget settings and customize the viewing options as per your choice.



STEP 1: CHANGE WIDGET SETTINGS – EDIT SETTINGS

To change the settings for a widget:

1. Click the *Settings* icon  on the right-hand corner of the widget header.
2. Select an appropriate option from the drop-down list (*Edit Settings*, *Edit Action Menu* & *Rename Widget*).

STEP 2: EDIT SETTINGS

Click the *Edit Settings* option; an *Edit Account Settings* overlay will be displayed.

The overlay consists of *Account View Name*, *Default View*, *Account Display* headers.

1. To create additional account views, click on the *Create View* button.
2. Enter the new account view name.

3. Click Next.

4. Select the appropriate accounts from the *Available Accounts* lists.
5. Click *Done* to complete the process.

You will return to the *Edit Account Settings* overlay. The newly created account view will be displayed on this overlay.

You may create as many account views as you like; accounts may be included in multiple views.

EDIT ACCOUNT SETTINGS

Account View Name

Default View

Account Display

Set All

All Accounts

☐

Account Nickname

Savings Accounts

☒

Account ID

Cancel

Done

Create View

STEP 3: ACCOUNT NUMBERS

In the *Edit Account Settings* overlay, you can define the *Default View* and choose to display Account Numbers, also known as Account IDs, instead of Account Nicknames:

1. Use the *Default View* radio button to determine which account list should be displayed when you first log into Treasury Internet Banking.
2. Select the *Account Display* as *Account ID*.
3. Click *Done* to save the changes.

DASHBOARD

ACCOUNT BALANCES

Savings Accounts

Checking	Opening Available	Interim Available	Actions
*****Q	\$ 32,552,719.49 As Of 12/24/2021 14:09	\$ 32,552,719.49 As Of 12/24/2021 14:09	
*****I	\$ 197,592.00 As Of 12/24/2021 14:09	\$ 197,592.00 As Of 12/24/2021 14:09	

The Dashboard should now display the *Account Balances* widget with the newly created account view.

DASHBOARD

ACCOUNT BALANCES

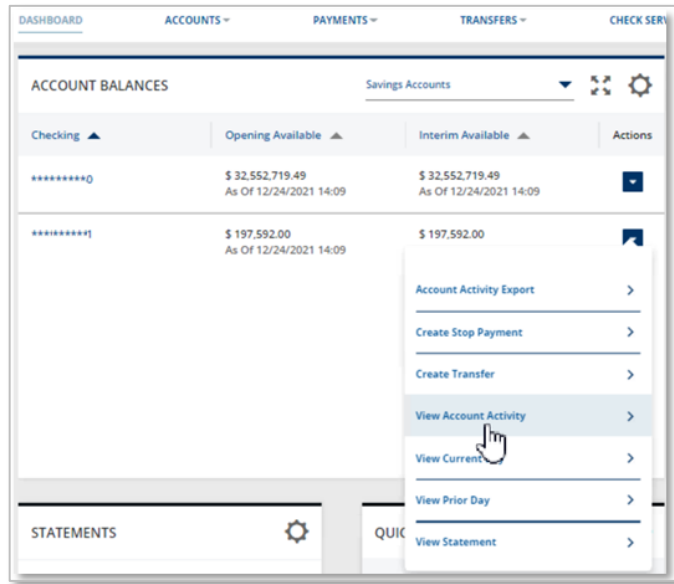
Savings Accounts

Checking	Opening Available	Interim Available	Actions
*****Q	\$ 32,552,719.49 As Of 12/24/2021 14:09		

All Accounts

Savings Accounts

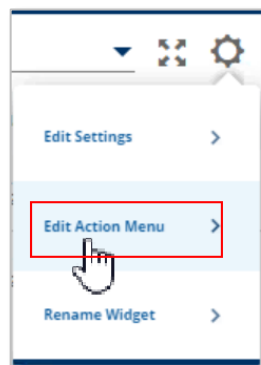
Use the dropdown list in the right-hand corner of the *Account Balances* widget to display a different account view.




STEP 4: CHANGE WIDGET SETTINGS – EDIT ACTION MENU

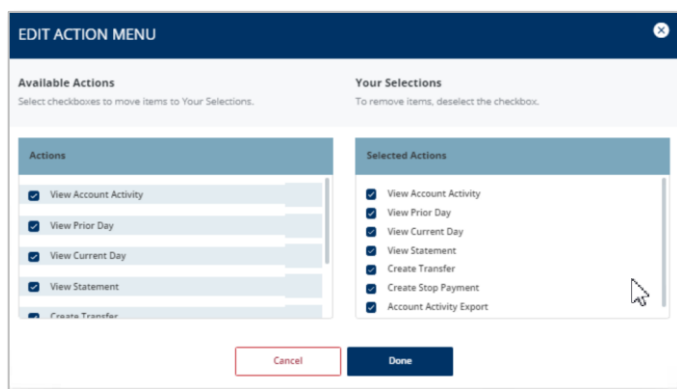
The *Account Balances* widget includes a configurable action menu that provides quick access to banking activities such as viewing the account's activity, initiating a transfer, or placing a stop.

The actions available are based on user and account entitlements.



To edit or remove actions,

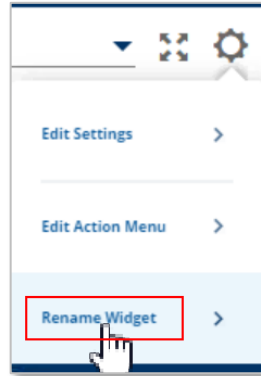
1. Click the *Settings* icon  on the right-hand corner of the widget header.
2. Click the *Edit Action Menu* option.




On *Edit Action Menu* overlay, you can select or deselect options using the checkbox. The Actions column shows all actions that are available for selection.

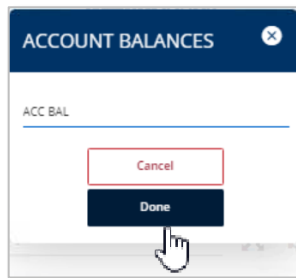
The *Selected Actions* header shows all actions available.

1. Click the checkbox for each action preferred.
2. Click *Done* to close the overlay and save the settings.



STEP 5: CHANGE WIDGET SETTINGS – RENAME WIDGET

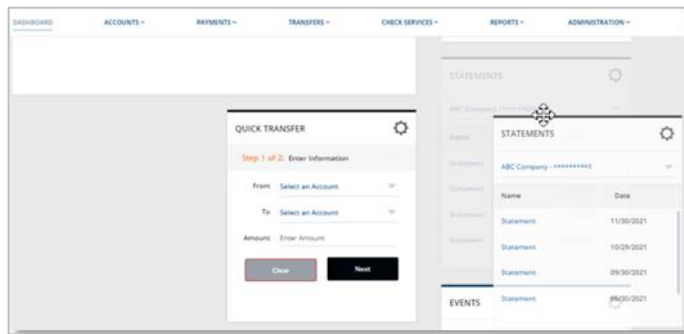
1. Click on the *Settings* icon  on the right-hand corner of the widget header and select the *Rename Widget* option.



An *Account Balances* overlay will be displayed.

2. Enter a new customized name and click *Done*.

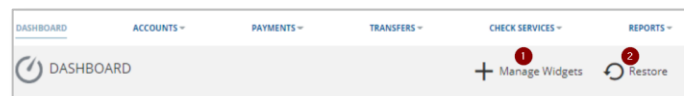
You will be navigated to the *Dashboard* and the widget will be displayed with the new customized name.



STEP 6: MOVE WIDGET

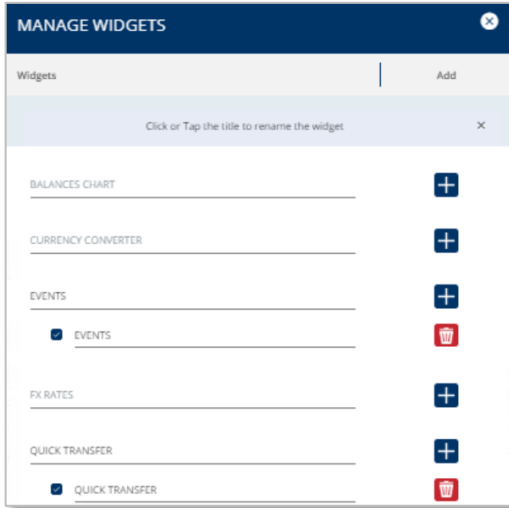
You can customize the location of any widget except the *Account Balances* widget. To move a widget:

1. Click on the widget.
2. Hold the mouse down and drag the widget to the desired position on the *Dashboard*.



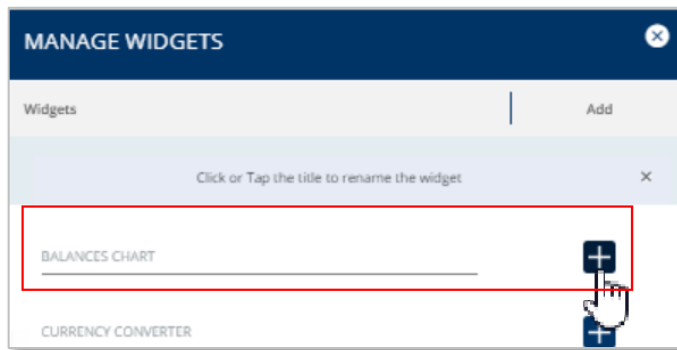
STEP 7: MANAGE WIDGETS

The *Dashboard* header has a *Manage Widgets* option which allows you to add new widgets and manage the existing widgets.



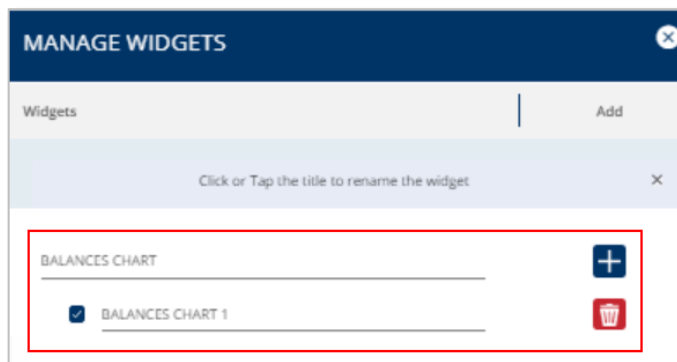
Click the Manage Widgets option.

The Manage Widgets overlay displays all available widgets whether selected or not, allowing the ability to add or delete from the Dashboard view. Additionally, you can customize the widget names and add duplicate instances of the same widget.



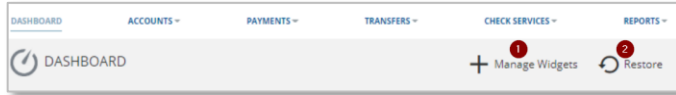
ADDING A WIDGET TO THE DASHBOARD

Click the + icon to add a new or duplicate widget to the Dashboard. Rename the widget if desired.



REMOVING A WIDGET

Click the delete icon to remove a widget from the Dashboard.



STEP 8: RESTORE THE DASHBOARD

To restore the Dashboard widgets to the default setting:

1. Click the Restore option in the Dashboard heading.
2. Confirm the request by clicking Restore again on the warning message.

