digital banking
step-by-step guide

Desktop Dashboard Customization

The Edit feature on the dashboard allows you to customize which widgets and accounts appear, as well as how they are arranged.

Dashboard Customization Step-by-Step

Use the following steps to edit your dashboard view.

Step	Action
1	Click the **Dashboard edit** ( ) icon at the top left of the screen.
2	Optional: Click the **Ellipses** (…) from the Recent Transactions widget to filter by account.
3	Optional: Click the **View** icon **( )** next to any account or loan record to manage account visibility. • The view icon indicates the record is **visible**. • The view icon indicates the record is **hidden**.
4	Optional: Click and hold the **Reorder Handle** ( ) icon next to any account or loan record then drag it to reorder the position (up or down only).
5	Optional: Click the **Cancel** hyperlink at the top left of the screen to keep the current dashboard configuration.
6	Click the **Save** button at the top left of the screen to confirm your dashboard configuration.
7	Optional: Click the **View** icon **( )** next to any widget (tile) to manage account visibility. • The view icon indicates the record is **visible**. • The view icon indicates the record is **hidden**.
8	Optional: Click and hold the **Reorder Handle** ( ) icon next to any widget (tile) then drag it to reorder the position on your dashboard.
9	Optional: Click the **Cancel** hyperlink at the top left of the screen to keep the current dashboard configuration.
10	Click the **Save** button at the top left of the screen to confirm your dashboard configuration.

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