



Mobile 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 customize your dashboard.

Step	Action
1	Tap the Edit (✍) icon at the top right of the screen to show the customization view.
2	Tap the View icon (👁) to manage widget (tile) visibility.
3	Tap the Hide icon (🗑) to remove the item from your dashboard view.
4	Tap the Reorder Handle icon (☰) to order your Cash Accounts (up or down only).
5	Tap the Cancel button to keep the current configuration.
6	Tap the Save button to confirm your dashboard customization.
7	Optional: Scroll down to edit the order of other Cash Accounts and Loans & Credit.
8	Tap the Edit (✍) icon on the right of the screen to show the customization view of My Dashboard.
9	Optional: Tap the Ellipses (...) to filter Recent Transactions by account.
10	Tap the View icon (👁) to manage widget (tile) visibility.
11	Tap the Hide icon (🗑) to remove the item from your dashboard view.
12	Tap the Reorder Handle icon (☰) to order your Cash Accounts (up or down only).
13	Tap the Cancel button to keep the current configuration.
14	Tap the Save button to confirm your dashboard customization.