

Dashboard

This is your landing page where you can access your accounts, review recent activity, and move money.

Default Layout

From left to right, top to bottom.

Navigation menu – Use the left side of the screen to navigate between sections of the website.

User menu (circle) – Access profile, support, settings or sign out.

Accounts – Displays rectangular account boxes showing account name, balance, status, and last four digits of account number.

Ellipses icon – Displays account view settings.

Scroll Buttons – Scroll left or right through your accounts.

Quick Action Buttons – Click a square button to jump to that feature of online banking.

Cards:

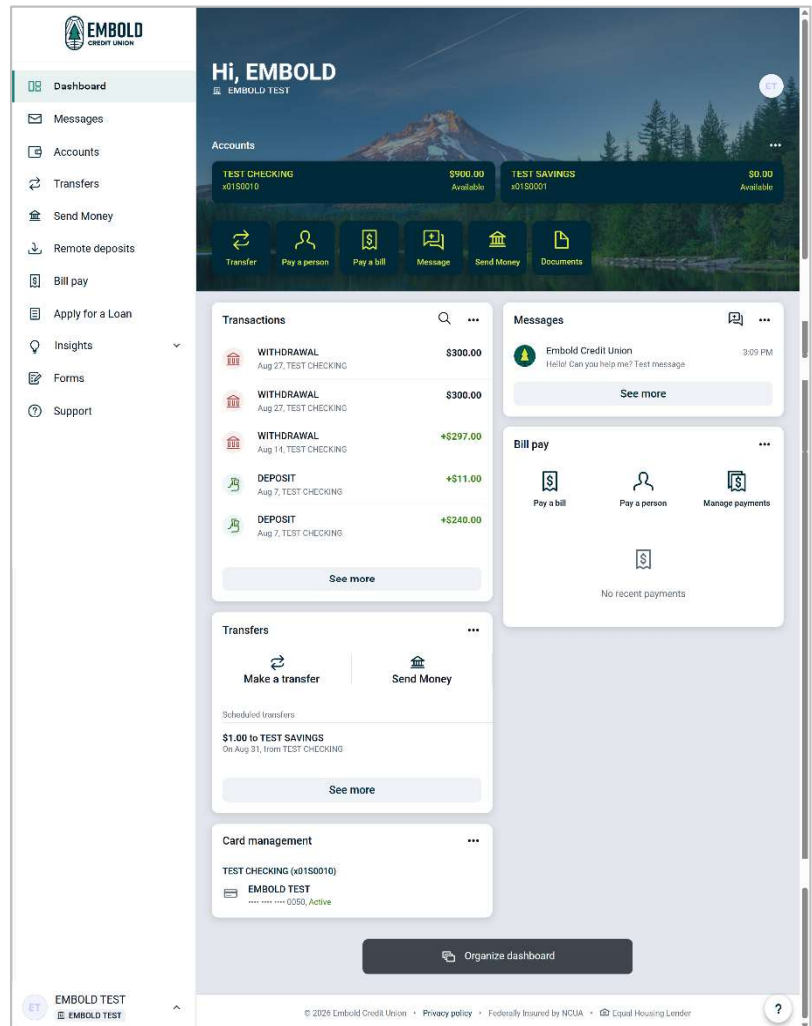
Transactions – Displays recent activity on all accounts.

Messages – Displays conversations between you and support representatives as well as alerts and bank messages.

Transfers – Displays scheduled transfers and a quick link to Make a Transfer.

Bill pay- Displays scheduled bill payments and quick links to Pay a bill, Pay a Person, or Manage payments.

Card management- Displays debit cards and allows you to toggle a card on or off, report it lost or stolen, reorder, or activate a new one.



Bottom of page

My Profile menu – Access Personal settings, Business management, Account settings or Sign out.

Organize dashboard – Rearrange or show/hide items appearing on your Dashboard.

Help (question mark icon) – Access the help menu.

Additional Available Cards:

Under *Organize Dashboard* click **+ Add a card**.

Spending by category- Tracks recent activity by transaction type.

Budgets- Track your monthly budget spending.

Cashflow- Review incoming bills and income along with a projected balance.

Goal progress- Track your progress toward savings goals.

Net worth- Review your assets and liabilities.

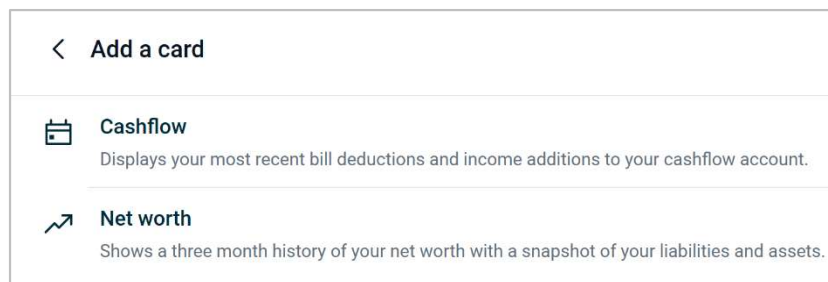
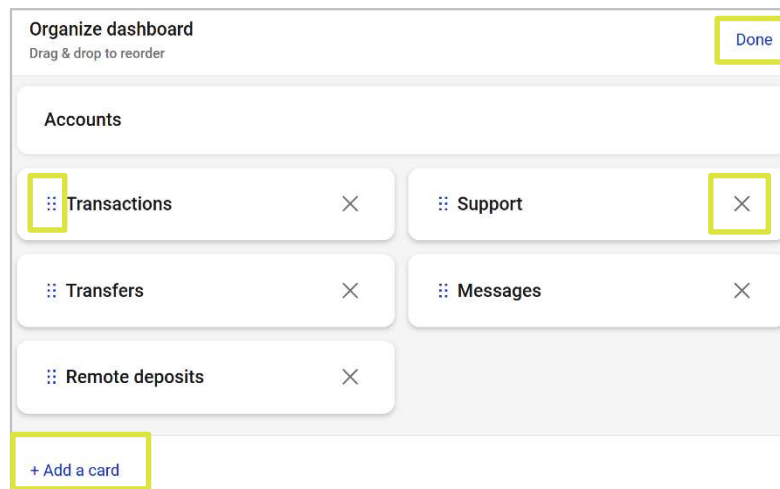
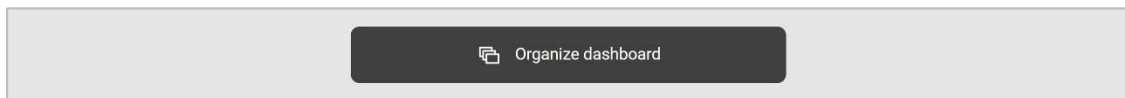
Remote deposits- Review recent mobile deposits.

Support- Displays our contact information.

Organize Dashboard

Use this feature to **add**, **remove**, or **reorder** the cards on the Dashboard.

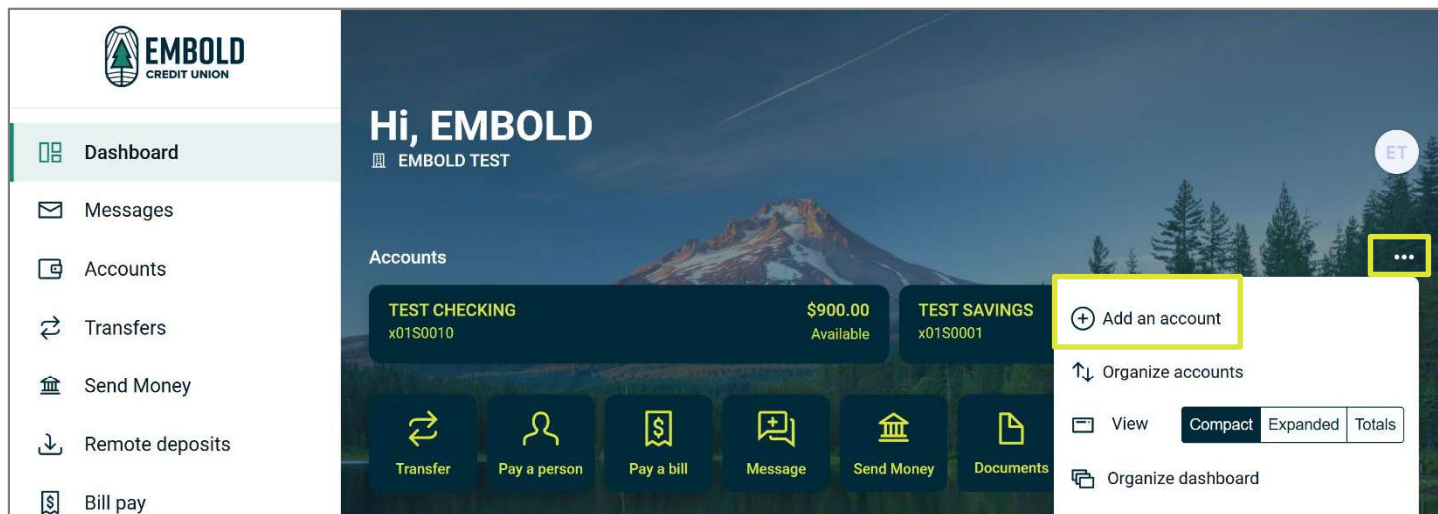
1. Click **Organize Dashboard** at the bottom of the Dashboard.
2. Click and hold the **6 dot icon** to drag and drop the cards to the order you prefer.
3. Click the **X** to remove a card from the Dashboard.
4. Click **+ Add a card** to browse available cards that may be added to the Dashboard. Select any you'd like to appear and click **<** when finished.
5. Click **Done** once the layout suits your needs.



Add an Account

Use this feature to open a new share at Embold Credit Union.

1. Click the **ellipsis icon** next to the **Accounts** section, then select **Add an Account**.



1. Click **Open an account**.
2. Select the Share type you'd like to open and click **Next**.
3. Choose which Share to open and click **Next**.
4. Review the Truth-In-Savings Disclosure and click **Agree & Continue**.

Open an account

Select Share type

☒ Savings

☐ Club Account

☐ Money Market

☐ Certificates

Next

Open an account

Select Share

☒ SPECIAL ACCOUNT
Min balance:\$0.00
Min opening balance:\$5.00
Interest rate: 0.000%

Next

- Choose how to fund the new Share and enter the amount to transfer to it. Click **Agree & Continue**.
- Review the details and click **Confirm** to open the new Share.

Open an account

Fund your Share

From

TEST CHECKING
\$900.00

Amount

\$ 5.00

Minimum of \$5.00

Agree & Continue

Open an account

New Share verification

Verify that the information for your new Share is correct before continuing.

Share information

Share type

SPECIAL ACCOUNT

Funding

Transfer from

TEST CHECKING
x01S0010

Amount

\$5.00

Confirm

Organize Accounts

Use this feature to change the order of your accounts on the Dashboard or update how the account information is displayed.

- Click the **ellipsis icon** next to the **Accounts** section, then select **Organize accounts**.



Dashboard

Messages

Accounts

Transfers

Send Money

Remote deposits

Bill pay

Hi, EMBOLD

EMBOLD TEST

Accounts

TEST CHECKING
x01S0010

\$900.00
Available

TEST SAVINGS
x01S0001

Transfer

Pay a person

Pay a bill

Message

Send Money

Documents

ET

...

+

 Add an account

↑↓

 Organize accounts

View

Compact

Expanded

Totals

Organize dashboard

- Click and hold the **6 dot icon** to drag and drop an account to the order you prefer.
- Click **Save**.

<

Organize accounts

Drag to reorder accounts

⋮

TEST SAVINGS

x01S0001

\$0.00

Available

⋮

TEST CHECKING

x01S0010

\$900.00

Available

Save

Account View

Use this feature to change what account information is displayed on the Dashboard.

Click the ellipsis icon next to the **Accounts** section choose from one the **View** options:

- **Compact:** Displays accounts in a single row. Only three accounts will appear at a time.
- **Expanded:** Displays accounts in two rows. Up to six accounts will appear at a time.
- **Totals:** Groups accounts together based on type such as Cash, Borrowed, Credit Balance, and Investments. Displays the total balance for all accounts in each group.



Dashboard

Messages

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Hi, EMBOLD

EMBOLD TEST

Accounts

TEST CHECKING

x01S0010

\$900.00

Available

TEST SAVINGS

x01S0001

\$0.00

Available

Transfer

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Documents

+

Add an account

↕

Organize accounts

View

Compact

Expanded

Totals

📄

Organize dashboard