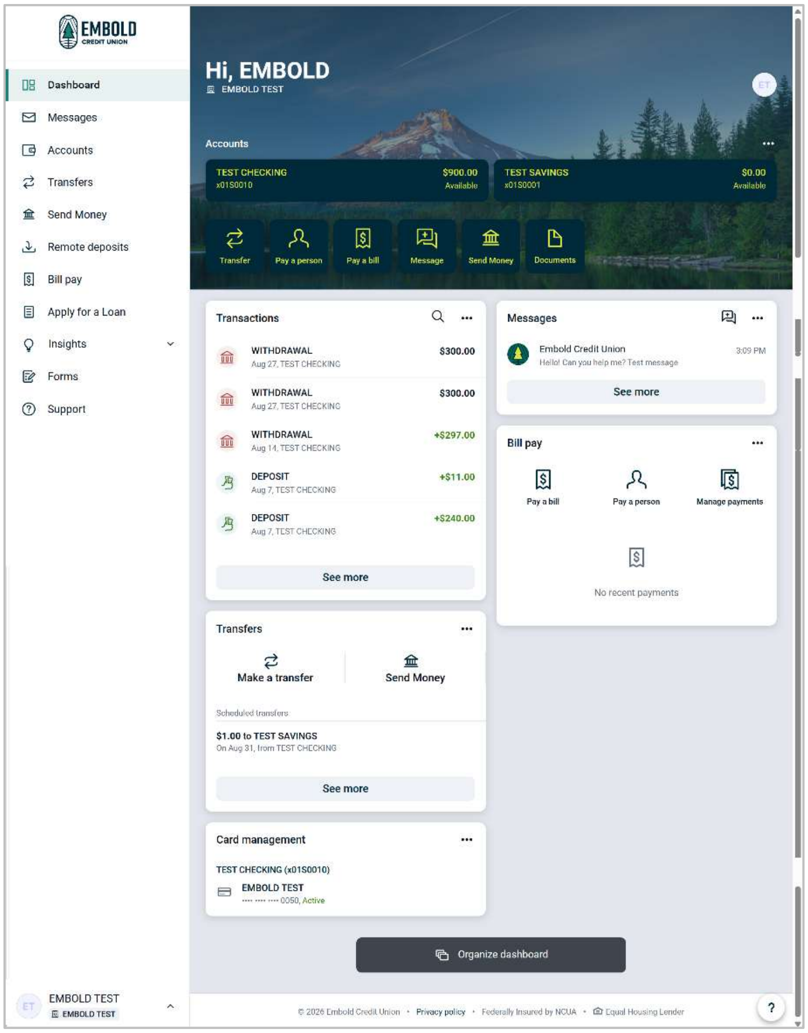
Dashboard

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.

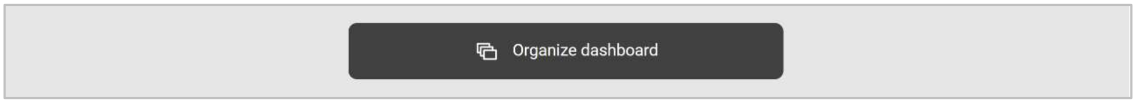
Bottom of page
My Profile menu – Access Personal settings, Business management, Account settings or Sign out.
Organize dashboard – Rearrange or show/hide items appearing on your Dashboard.
Help (question mark icon) – Access the help menu.

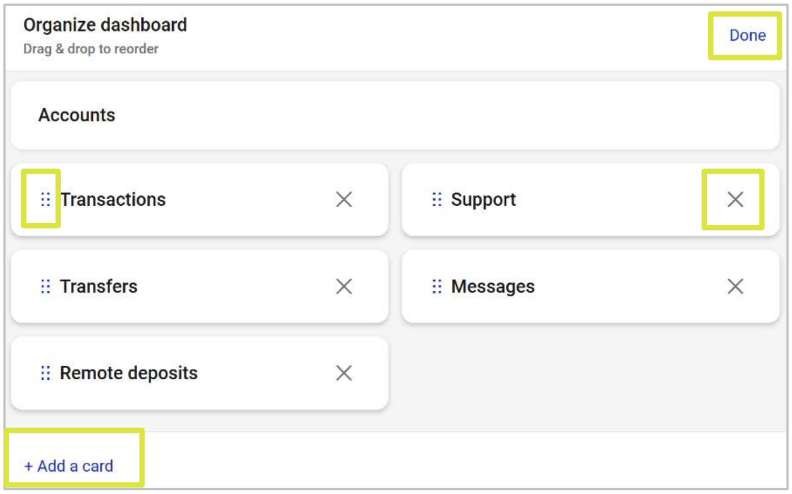
Additional Available Cards:
Under *Organize Dashboard* click **+ Add a card**.
Spending by category- Tracks recent activity by transaction type.
Budgets- Track you monthly budget spending.
Cashflow- Review incoming bills and income along with a projected balance.
Goal progress- Track your progress toward savings goals.
Net worth- Review your assets and liabilities.
Remote deposits- Review recent mobile deposits.
Support- Displays our contact information.

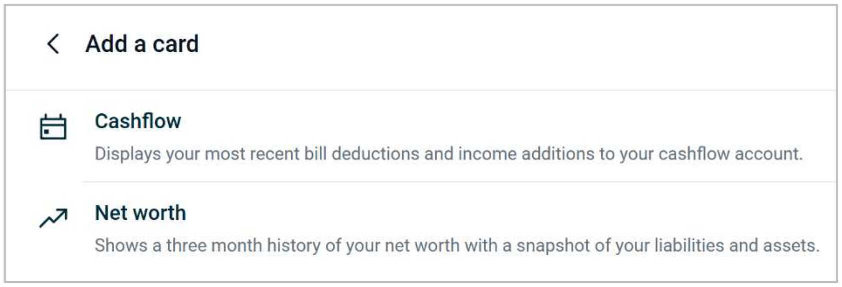
Organize Dashboard

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.



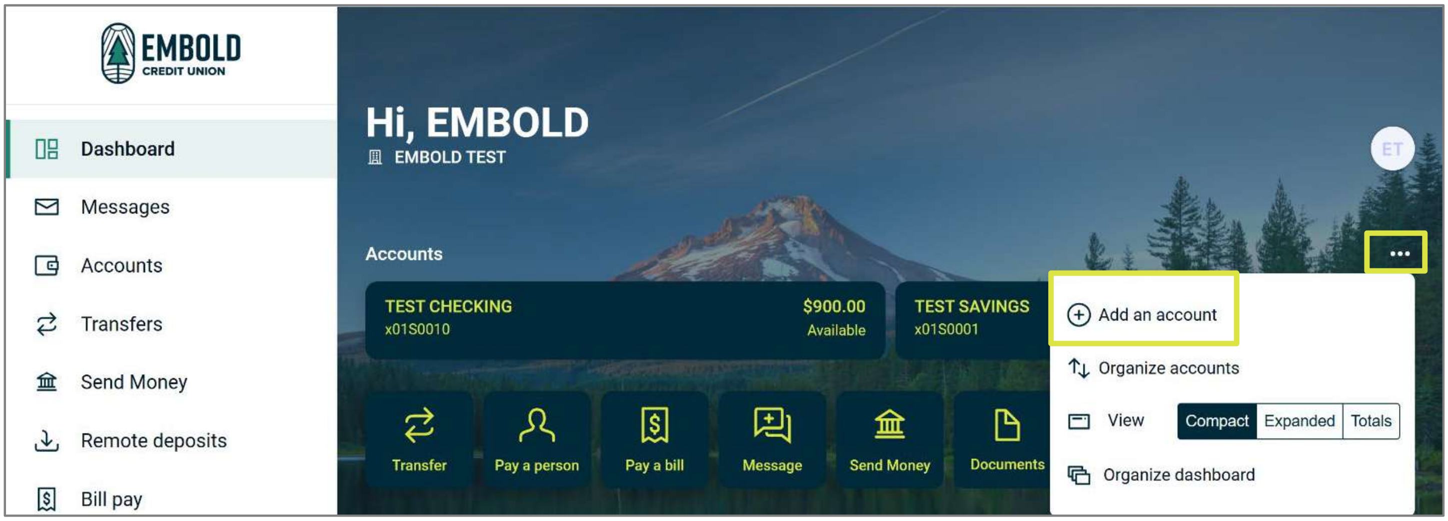




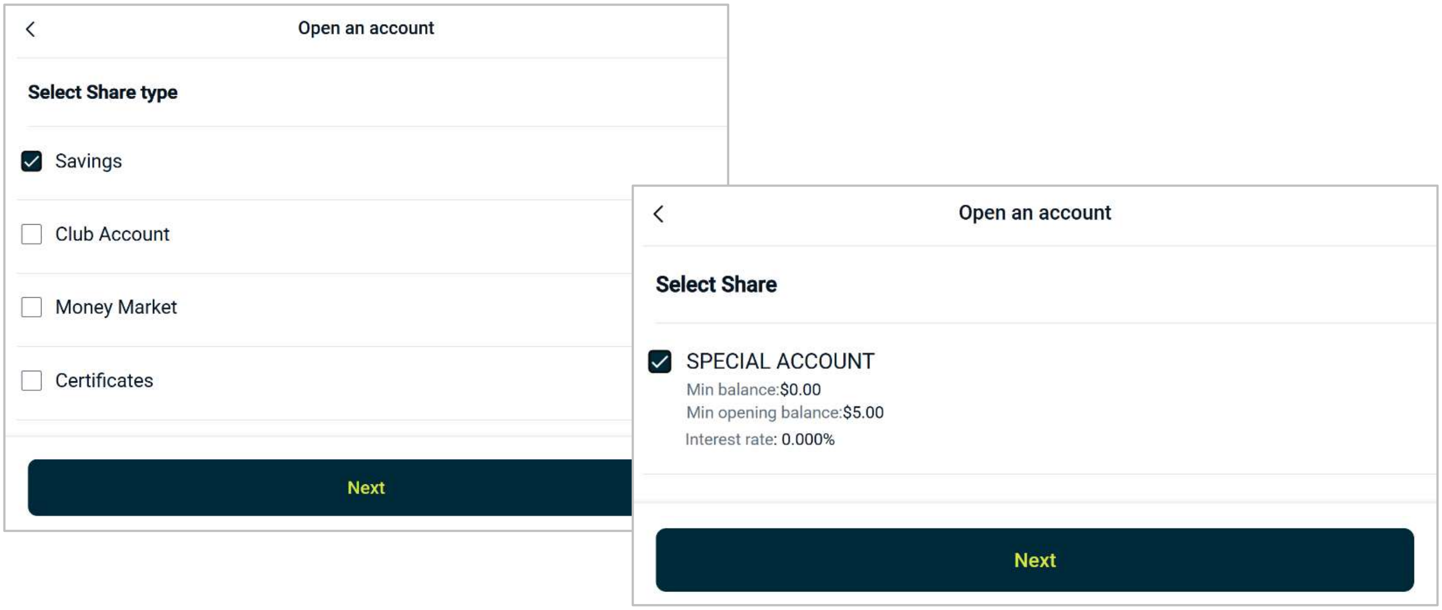
Add an Account

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

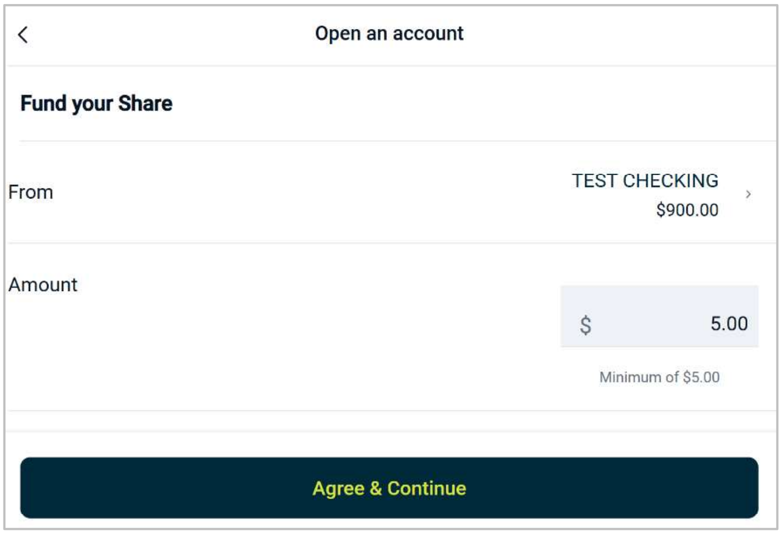
1. Click the **ellipsis icon** next to the **Accounts** section, then select **Add an Account**.

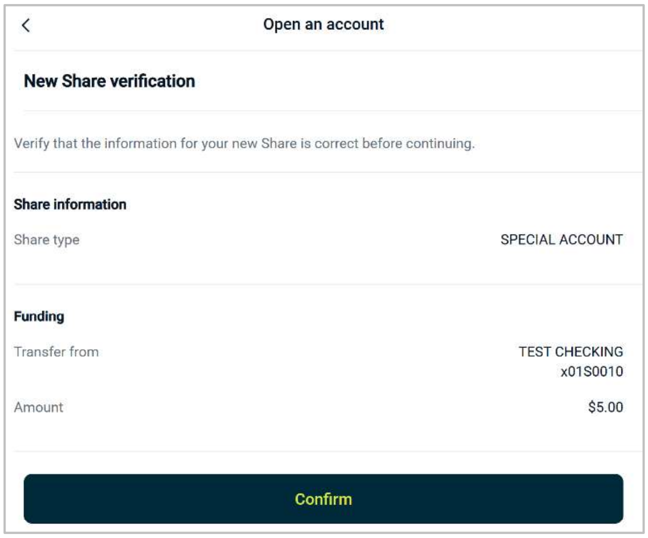


1. Click **Open an account**.
2. Select the Share type you'd like to open and click **Next**.
3. Choose which Share to open and click **Next**.
4. Review the Truth-In-Savings Disclosure and click **Agree & Continue.**



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

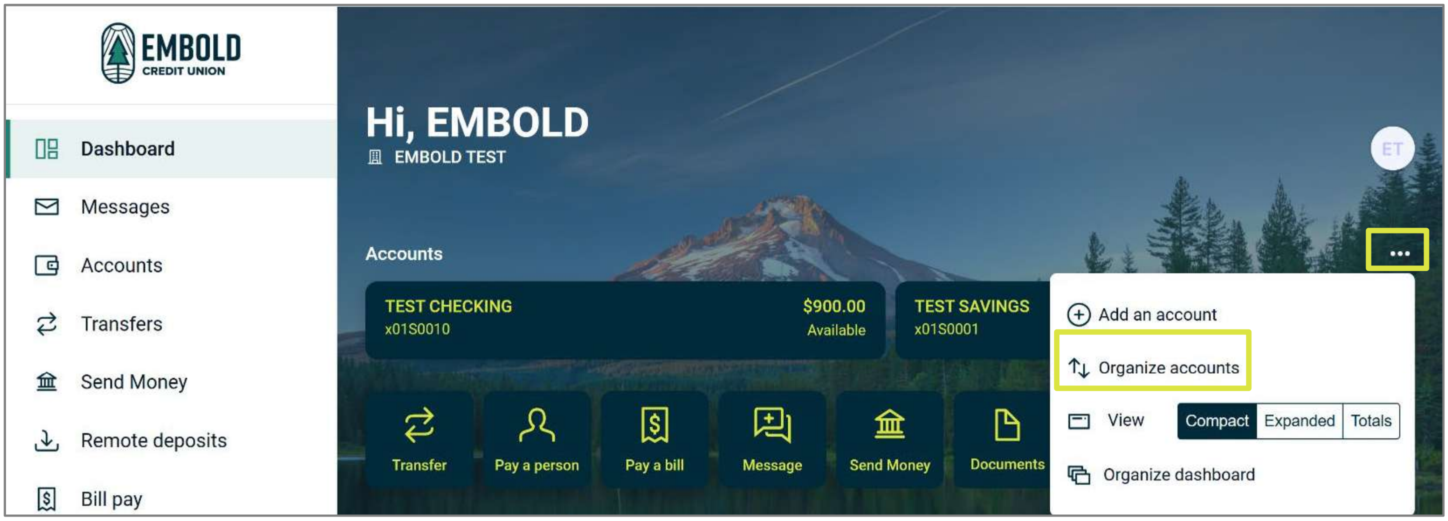




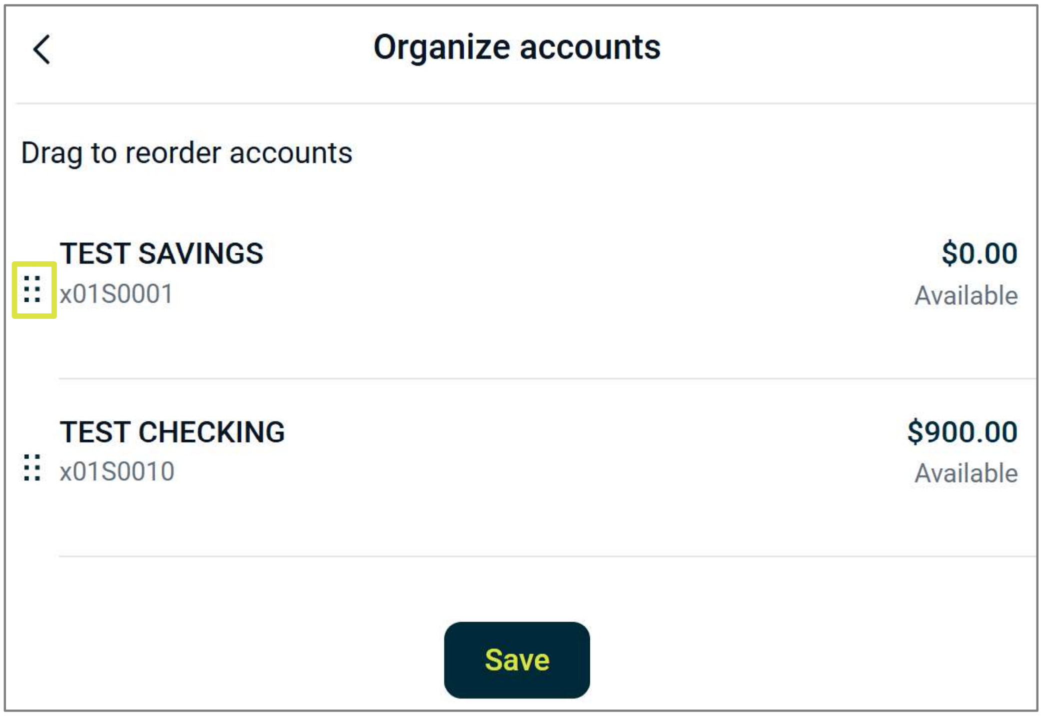
Organize Accounts

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

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



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