TREASURY MANAGEMENT

Customizing My Dashboard

Select **Configure Dashboard** to customize your dashboard with the information that is most relevant to your workflow.

Once in the configure dashboard menu, you can reposition and/or resize the widgets. You can add additional widgets by selecting **Add Widget.**

You have the option to add/remove these widgets:
➢ Quick Transfer
➢ Stop Payment Pending Approval
➢ Positive Pay (Check & ACH Exceptions)
➢ Payments Pending Approval (Transfers, ACH & Wires)
➢ Quick Loan Payment
➢ Favorite Reports

Customize your widgets and then select **Save**.

Questions? Please contact our Treasury Management Support Team at 317-261-0333 or treasurymanagement@nbofi.com.

TREASURY MANAGEMENT

Customizing My Dashboard

To add accounts to My Dashboard, select **Manage Groups**. You can create new groups (up to 20), rename groups, add accounts to groups (up to 50) and delete groups from this menu.

After changes are made, select **Done**.

NOTE: Group One will stay expanded for a quick view of accounts. Subsequent groups will default to a collapsed view and need expanded by the user each time you navigate to **My Dashboard**.

If additional accounts are added to your relationship, they will not automatically appear in your Accounts widget, you must add them to a group.

Accounts   ⚙ Manage Groups   Expand All | Collapse All

⊖ Group One (0)   Group available balance: $0.00

No accounts assigned to this group. Click Manage Groups to delete, rename, or add accounts to this group.

⊕ Group Two (0)   Group available balance: $0.00

No accounts assigned to this group. Click Manage Groups to delete, rename, or add accounts to this group.

≡ Account List

Manage Account Groups ✕

Type to filter 🔍   **Create New Group**

ⓘ You can create up to 20 groups to display in the widget. Each group can have a maximum of 50 accounts.

⇕ ⊖ Group One (0) ✎   Add Accounts | 🗑 Delete Group

No accounts assigned to this group.

⇕ ⊕ Group Two (0) ✎   Add Accounts | 🗑 Delete Group

Done

THE NATIONAL BANK of INDIANAPOLIS

TREASURY MANAGEMENT

Customizing My Dashboard

In the **Accounts** widget, select **Account List** to view a list of all accounts.

From this menu you can perform the following actions: **transfer to**, **transfer from**, and **download** transaction history.

For each account you can view the following information: **account number**, **account name**, **status**, **current balance**, **collected balance**, and **available balance**.

You can use the arrow indicators on each category heading to sort information to your preference.

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