My Account Page

User Guide

Rev. 03/11

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My Account Page

The *My Account Page* provides an alternative, customizable landing page for you to more easily access your Online Banking account information upon login. This page will not replace any existing page; it will simply provide a dashboard-style view of your various options.

If you decide to make the *My Account Page* screen your new default landing page upon login, the instructions below will help you determine how to configure your page.

Terminology Used In This Guide

Widget: A piece of code within a web page that contains specific bits of data of interest to the user. Multiple widgets can display on one screen to allow the user to establish a dashboard style view of their Online Banking account. An example of a *My Account Page* widget would be "Scheduled Transfers".

Lightbox: A window that allows the user to configure the widgets that display on the *My Account Page* and configure the content of individual widgets.

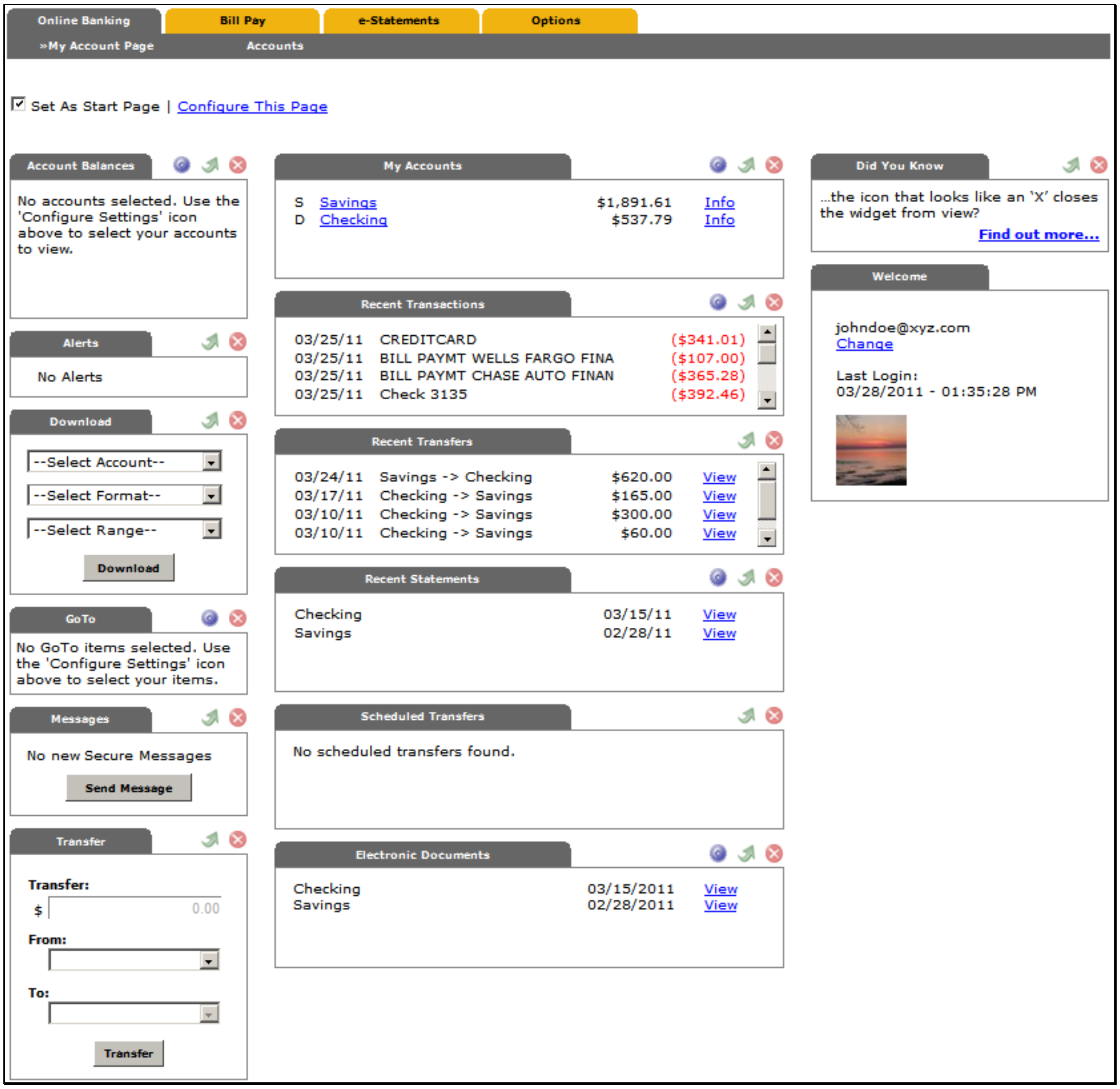
My Account Page: The name of the option that contains a dashboard view of various Online Banking-related options or information.

Launch Page: The screen an Online Banking user first sees after successfully logging into Online Banking. Also referred to as a "landing page". The current launch/landing page is the Account Listing page.

Getting Started

Click the *My Account Page* option within the main navigation bar. This option appears to the left of the Account Listing option.

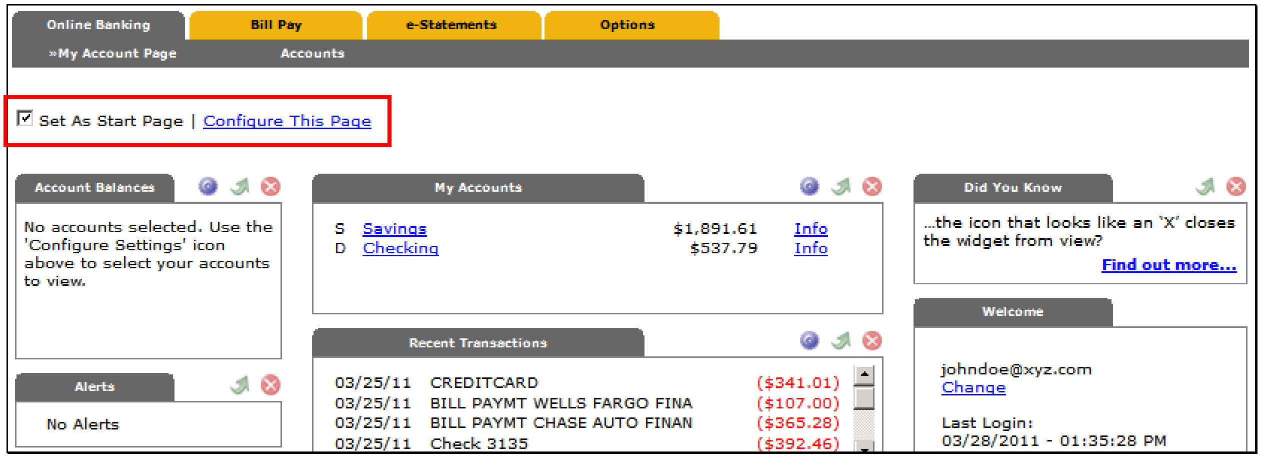
After the *My Account Page* loads, you will see default widgets and page configuration options.



Configurable widgets will show a default message indicating you should use the 'Configure Settings' icon. Once you initially configure the widget, your data will populate.

My Account Page Configuration

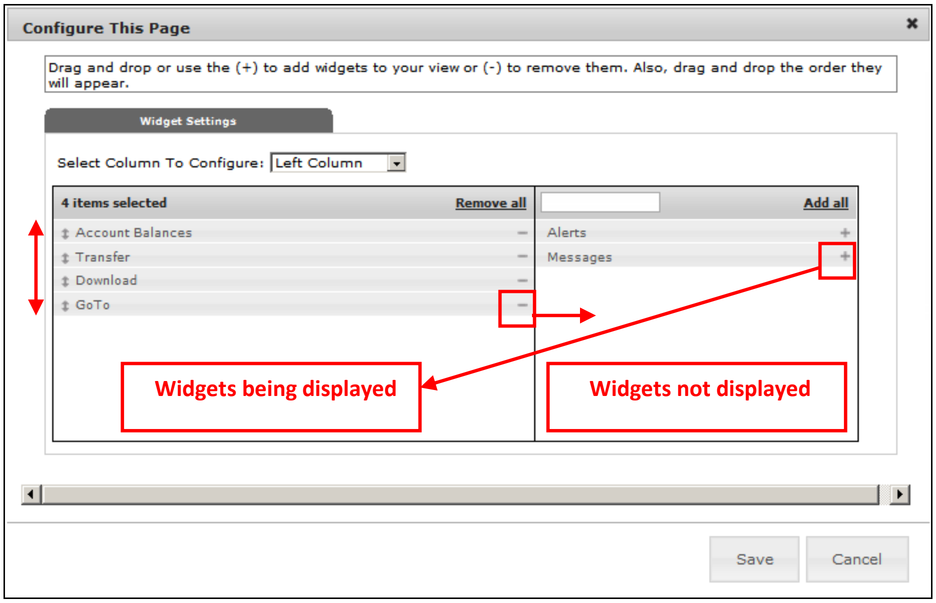
You can configure your *My Account Page* with the **Set As Start Page | Configure This Page** option, which appears in the top left portion of each screen.



Set As Start Page: Select to save the page as your new landing screen upon login instead of seeing the standard Account Listing page. If left *de*selected, you must actively navigate to the *My Account Page* options to access those screens.

Note: You can always navigate to the traditional Account Listing page. You can also deselect this field to restore the traditional Account Listing page as the default landing page.

Configure This Page: Upon clicking this link on the *My Account Page*, you will see a lightbox window allowing control over which widgets to display on that page. Any widget not set as a default by the bank will be listed in the right column of the lightbox window and can be added by you.



To configure the page:

Step 1: Choose a column to work with from the **Select Column To Configure** drop-down field. The names of widgets (items) assigned to that column will appear below.

Note: *My Account Page* has a left, center and right column. The default selection is the left column. Widgets are assigned into specific columns on the *My Account Page* and cannot be reassigned to different columns.

Step 2: Review the widgets being displayed (left side of lightbox).

Step 3: Review the widgets not currently displaying (right side of lightbox).

Step 4: Add or remove widgets and change the order of display, if desired.

a) You can click **minus** (-) on individual widgets to remove that widget from view. You can also click **Remove all** to eliminate all widgets from view. The removed widgets will then be listed on the right side of the lightbox for later addition.

b) You can click the **plus** (+) on individual widgets to display that widget. You can also click **Add all** to display all widgets. The added widgets will then be listed on the left side of the lightbox.

c) You can **search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.

d) You can **click and drag** the displaying widgets to change the order.

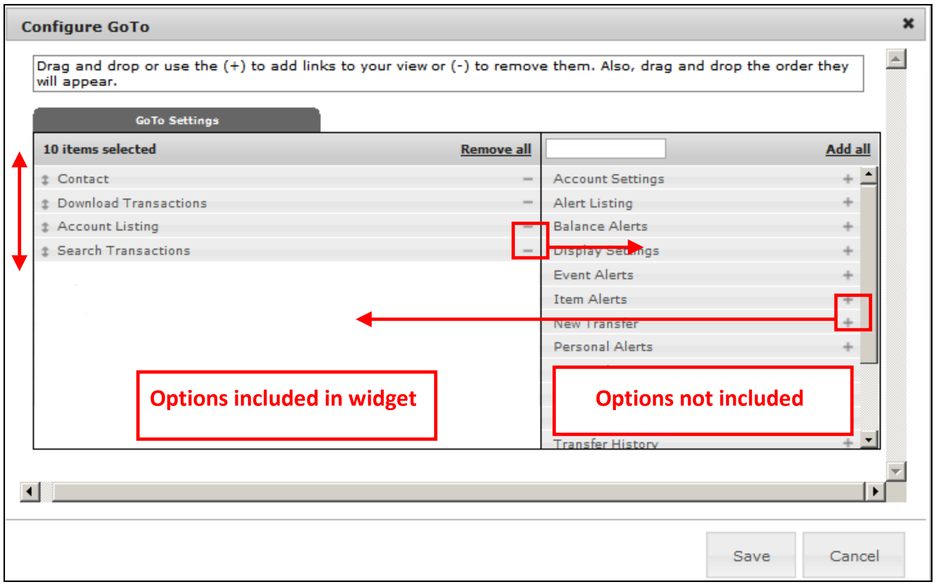
Step 5: Return to Step 1 until all columns have been set up.

Step 6: Click **Save** to retain changes made to all columns. The **Configure This Page** lightbox will close and the *My Account Page* will reload to reflect the changes.

My Account Page Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration lightbox window will vary based on the purpose of the widget.

Note: The Configure icon will not appear on widgets where configuration is not applicable.



To configure a widget:

Step 1: Click the **Configure** icon on the widget. The Configure lightbox will appear:

Step 2: Review the items being displayed (left side of lightbox).

Note: If you are configuring a widget for the first time you will not have any items on the left side.

Step 3: Review the items not currently displaying (right side of lightbox).

Step 4: Add or remove items and change the order of display, if desired.

a) You can click **minus** (-) on an individual item to remove that item from the widget. You can also click **Remove all** to eliminate all items from the widget. The removed items will then be listed on the right side of the lightbox for later addition.

b) You can click the **plus** (+) on individual items to include it in the widget. You can also click **Add all** to include all items. The added items will then be listed on the left side of the lightbox.

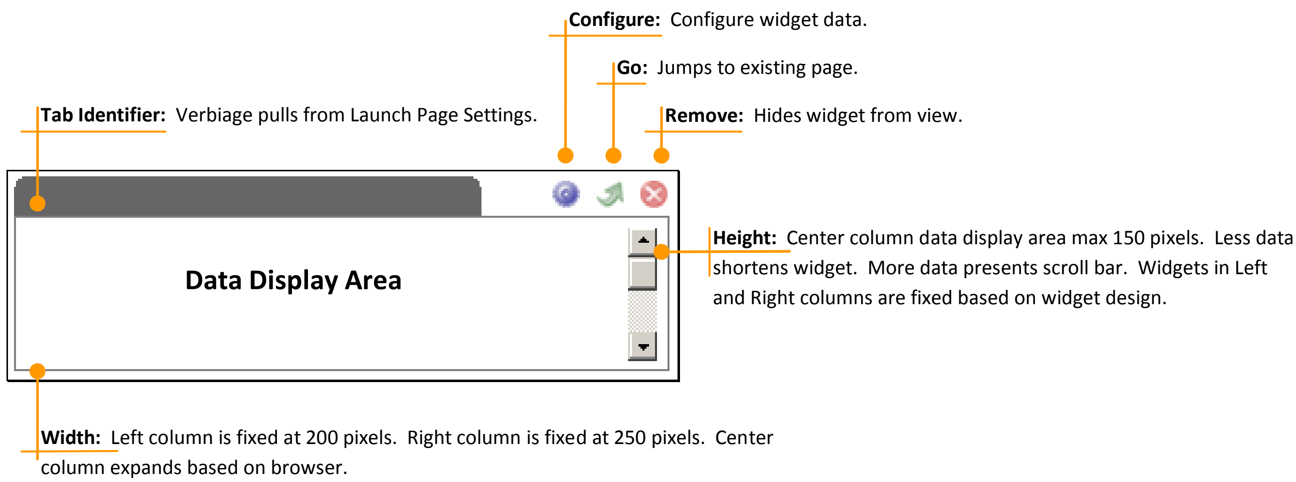
c) You can **search** the un-added items by keying in the item name. The search box is not case sensitive.

d) You can **click and drag** the displaying items to change the order.

Step 5: Click **Save** to retain changes made to the widget. The **Configure** lightbox will close and the widget will reload to reflect the changes.

Widget Formatting

The widget formatting is as follows:



The widget formatting is as follows:

Configure: Click to access a lightbox window that allows you to configure the widget. For example, clicking Configure in the "Recent Transactions" widget shows a list of accounts you can display within the widget.

Go: Click to jump to the traditional screen relating to the data contained in the widget. For example, clicking Go in the "Recent Transactions" widget takes you to the Transactions option.

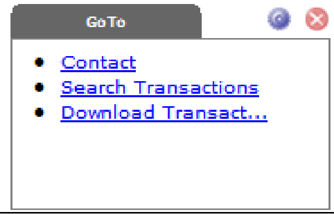
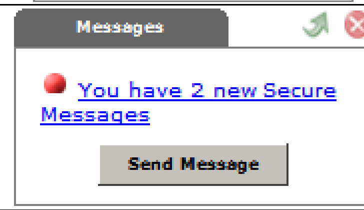
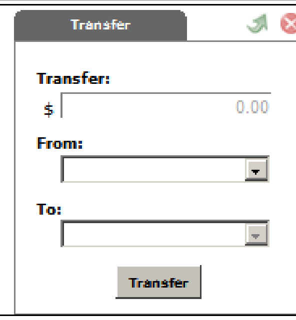
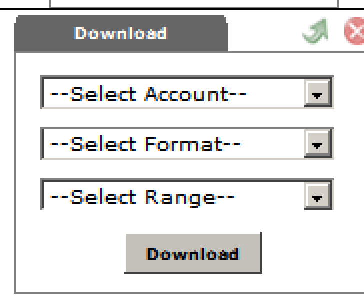
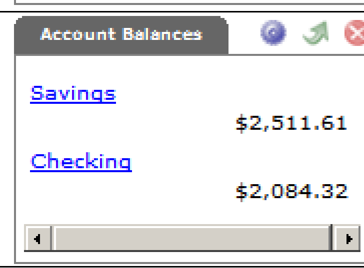
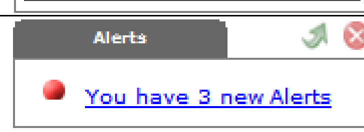
Remove: Click to immediately remove the widget from the *My Account Page*. You can always re-add the widget under the **Configure This Page** link.

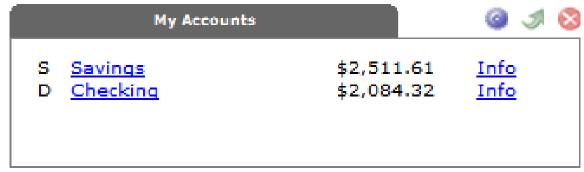
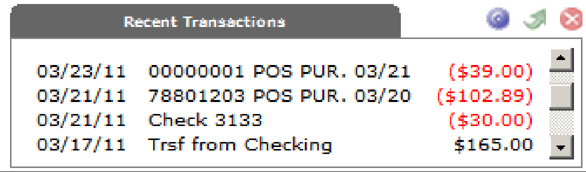
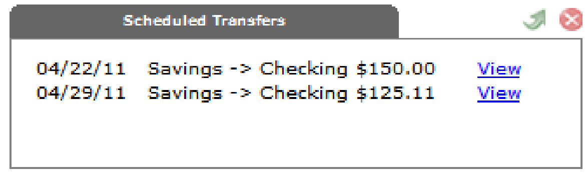
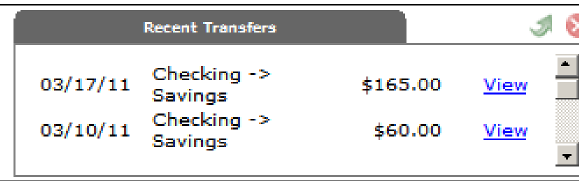
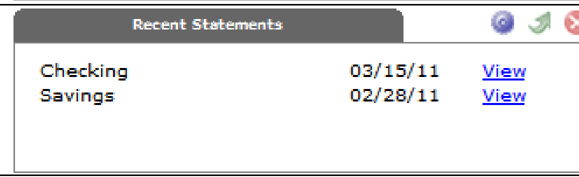
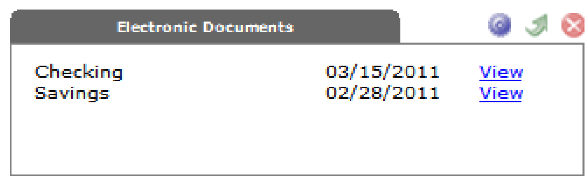
Upon placing the cursor over the **Configure**, **Go** or **Remove** icon, text will hover over the icon to define it.

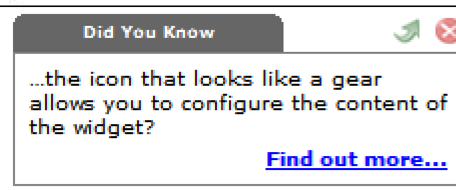
Note: Not all widgets have all three icons.

Widget Definitions

Note: Widgets are subject to availability.

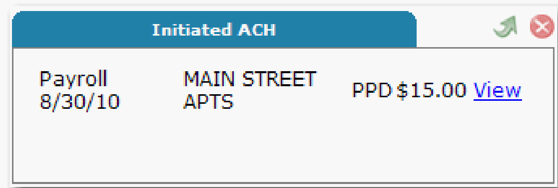
Left Column (Actionable Items)			
Widget Name	Function	Go destination	Image
GoTo	Links to other applicable functions	N/A	
Messages	Indicates receipt of secure messages from the bank	Message Center> View Messages	
Transfer	Conduct one-time, immediate transfer	Transfers> New Transfer	
Download	Conduct transaction download	Transactions> Download	
Account Balances	Balance of accounts. Click pseudo name to see Account information.	Account Listing	
Alerts	Indicates receipt of login alert.	Options> Alerts	

Center Column (Informational Items)			
Widget Name	**Function**	**Go destination**	**Image**
My Accounts	Shows account, balance. Click pseudo name to access transactions. Link to Account Info.	Account Listing	
Recent Transactions	Last 30 days of transactions on all accounts configured. Roll over transaction to see account number affected.	Current Transactions	
Scheduled Transfers	Lists pending transfers. Link displays all transfer details.	View Scheduled Transfers	
Recent Transfers	Lists transfer history. Link to full transfer details.	Transfers > History	
Recent Statements	Lists statements. Link displays statement in lightbox window.	Statements	
Electronic Documents	Links to electronic documents. Note: You must be enrolled before this widget is available.	eStatements> Statements and Notices	

Right Column (Bank or User Related Items)			
Widget Name	**Function**	**Go destination**	**Image**
Welcome	Displays your user name, email address, last login information and watermark. Link takes you to Personal Options.	N/A	
Did You Know	*My Account Page* tips. Link directs to additional detail about the tip with further access to all tips.	List of all Did You Know topics.	

Business Online Banking Widgets

NOTE: Availability of widgets is based on the user's permissions within the Business Online Banking cash user setup.

Center Column			
Widget Name	Function	Go destination	Image
Recent ACH	Lists last 7 days of ACH history. Link directs to batch details.	ACH> History	
Positive Pay Exceptions	Lists Positive Pay/ARP exceptions. Roll over to see exception reason.	ARP> Exceptions	
Initiated ACH	List ACH batches in an Initiated status. Link directs to View Batch details.	ACH> Batch List	
Wires Transmitted	Lists last 7 days of wire history.	Wires> History