

## New Digital Banking Dashboard – 08.19.2025



### Account Overview

This section will display the Account Favorites and a summary of your deposit and loan amounts.

**Account Overview** [Edit Favorites](#)

Total Deposits 1 Accounts  
**\$58,000.00**

Total Loans 1 Accounts  
**\$100.00**

Checking ★ \*1234  
-\$58,602.50

Loan ★ \*1234-123  
\$100.00

[View All Accounts](#) [Add Account](#)

### My Favorite Accounts

The first time that you log in, the system will automatically flag the first six accounts listed on the Accounts tab as "Favorites." You can update this list by:

1. Selecting **Edit Favorites** at the top of the Account Overview section.

**FDIC** FDIC-insured - Backed by the full faith and credit of the U.S. Government  
**INVISIONBANK**

**Account Overview** [Edit Favorites](#)

Total Deposits 1 Accounts  
**\$58,000.00**

Total Loans 1 Accounts  
**\$100.00**

Checking ★ \*1234  
**\$58,000.00**

Loan ★ \*1234-123  
**\$100.00**

[View All Accounts](#) [Add Account](#)

2. The **Edit Favorite Accounts** window will appear. Your accounts will be displayed in the **All Accounts** section on the right. If needed, you can use the **Search Accounts** box to find specific accounts by name or account number.

**Edit Favorite Accounts** ×

Select up to 6 favorite accounts to display on your Dashboard. Use the star icons to favorite or unfavorite an account and use drag and drop to reorder favoritized accounts.

**Favorite Accounts** 0 / 6

You have no favorite accounts. Drag and drop or select the star icon on an account to add it to your favorites.

**All Accounts** 2

Checking \*1234 ★

Loan \*1234-123 ★

3. You can add accounts to the Favorite Accounts list by selecting the star icon for each desired account.

**All Accounts** 2

Checking \*1234 ★

Loan \*1234-123 ★

4. You can arrange the order of your favorite accounts by dragging and dropping the accounts in order, or by selecting the account and using the up and down caret buttons.

**Favorite Accounts** 2 / 6

↑ ↓

Checking \*1234 ★

Loan \*1234-123 ★

→

**Favorite Accounts** 2 / 6

↑ ↓

Loan \*1234-123 ★

Checking \*1234 ★

5. Once all changes have been made, you can then exit the Favorite Accounts window and return to the Dashboard. The screen will update to show your favorite accounts in their established order.

**My Favorite Accounts** [Edit](#)

Loan ★ \*1234-123  
**\$100.00**

Checking ★ \*1234  
**\$58,000.00**

Recent/Upcoming Transaction Search

The Recent and Upcoming Transactions tiles display transactions for the highest listed favorite Account by default. You can display transactions from additional accounts by selecting the account drop-down and choosing a new account.

If your accounts are not displayed, you can also search for the account by name and number.

Recent Transactions

Checking \*1234

Q

MAINTENANCE FEE

Apr 15, 2025

Checking \*1234

0

MAINTENANCE FEE

Mar 14, 2025

Loan \*1234-123

0

MAINTENANCE FEE

Jan 15, 2025

-\$5.00

View More

Upcoming Transactions

Use the drop-down list to choose the account that you wish to view. Upcoming transactions will be displayed. If desired, you can click View More to see more transactions.

Upcoming Transactions

Checking \*1234

Checking \*1234 - \*1234

Feb 10, 2025

\$50.00

Account to Ext Account

Checking \*1234 - \*1234

Feb 12, 2025

\$1,000.00

Account to Ext Account

Checking \*1234 - Savings \*0000

Apr 17, 2025

\$100.00

Account to Account

loan payment

May 14, 2025

\$10,000.00

Payment

View More

Favorite Payees

If you have payees set up, you can indicate favorite payees to list here.

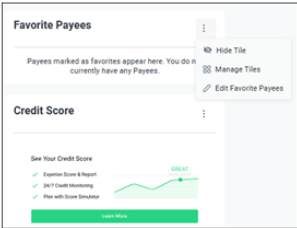
Favorite Payees

Payees marked as favorites appear here. You do not currently have any Payees.

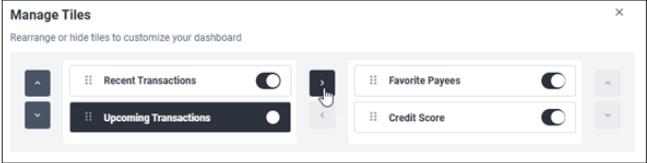
Customize Dashboard Layout

You can modify the arrangement of your dashboard by hiding or re-arranging the tiles.

- 1. You should scroll to the Customizable Tiles section and select the Options (three-dot) menu on any tile.
- 2. You can select **Hide Tile** to remove the tile from the dashboard or select **Manage Tile** to open the **Manage Tiles** window.



- 3. You can drag and drop to change the arrangements of the tiles or use the toggle switches to hide/display tiles.



- 4. Once you are satisfied with the tile arrangement, you can select the **X** to exit the Manage Tiles screen and return to the Dashboard. The screen will refresh to show the layout changes.

