DASHBOARD CONFIGURATION
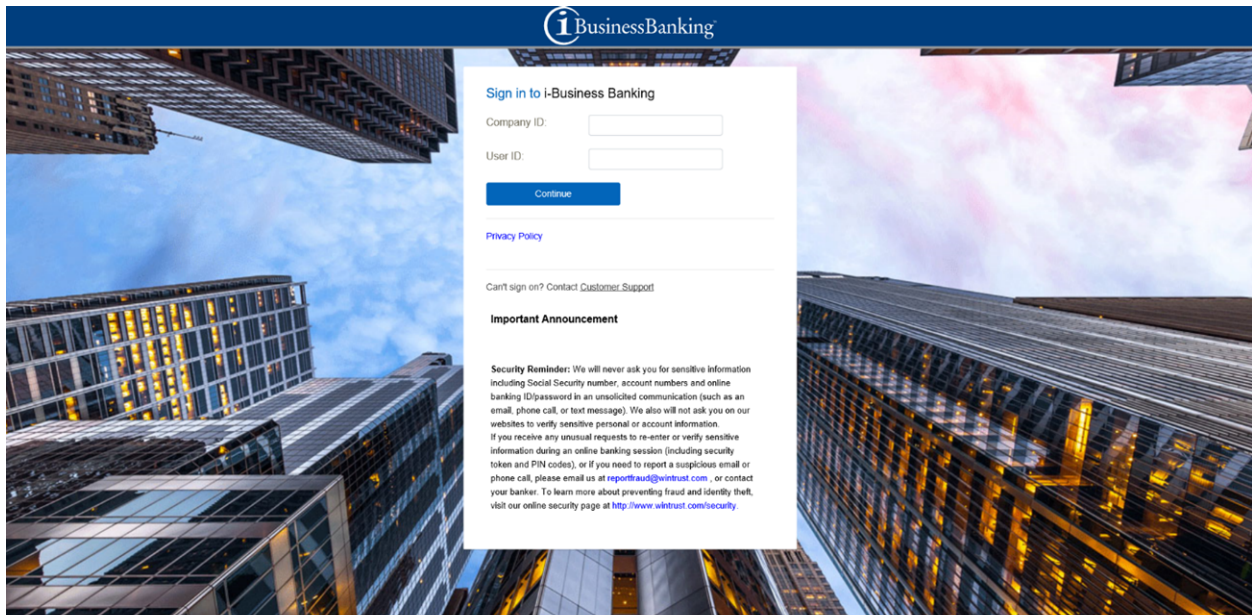
IBUSINESS BANKING (IBB) UI REFRESH DASHBOARD CONFIGURATION

Wintrust Treasury Management

www.wintrust.com

V1.00

Last Updated: January 2023
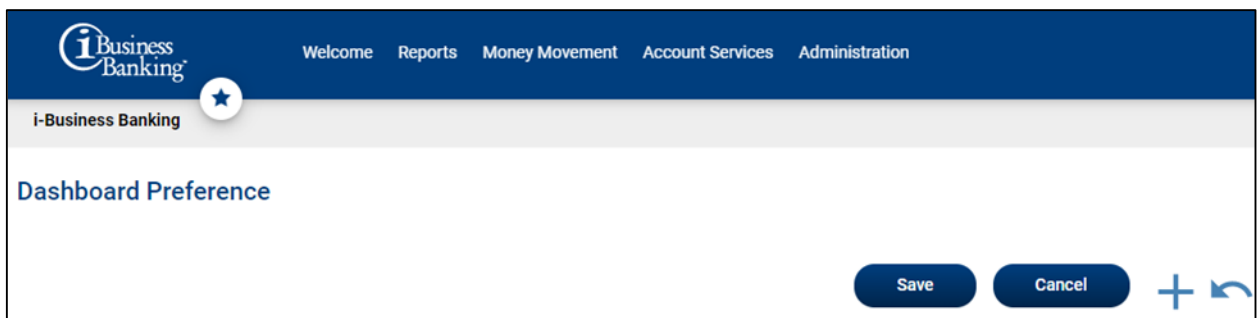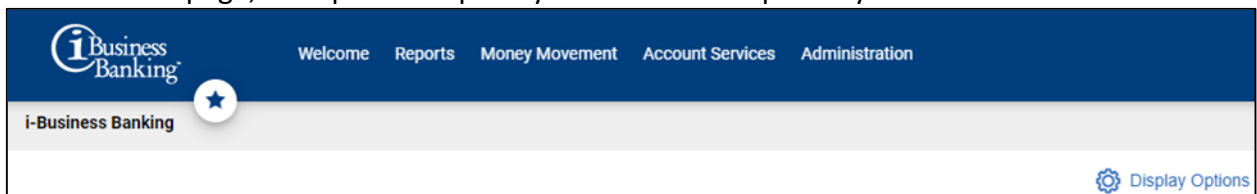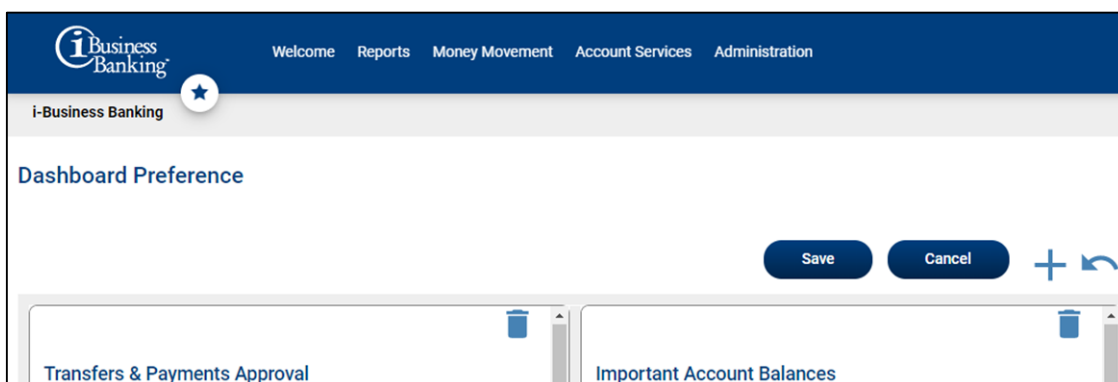
What Do I Need to Do on January 23, 2023?

Users **may to re-configure their Dashboard** the first time they log in to the new application.

TO ADD PANELS

1. Dashboard panels are defaulted based on a user's account and service entitlements.

2. To add additional panels, click on the Display Options wheel in the upper right hand side of the Welcome page, then press the plus symbol to add the panels you would like to see.

3. The panels can be arranged on the page to your preference. To move a panel, you will need to be within the Display Options page. Hover over the panel and click to drag and drop it.

4. Click Save to save the changes.

5. To delete an existing panel, click on Display Options and click the trashcan the in upper right hand corner of the panel.

DASHBOARD CONFIGURATION

TO ADD ACCOUNTS

1. To add accounts to panels, click on the Edit Accounts Displayed wheel on the middle left hand side of the panel.

2. In the Account dropdown menu under Choose Account, select the account(s) you would like displayed on the dashboard. You must do this for each applicable account type tab (i.e. checking, saving, loan, etc.). There is no limit to the number of account panels that you can add to the dashboard, but only 7 accounts are displayed at a time in each panel.

3. To change the order in which the accounts will display in the panel(s), click the account under the Order Accounts and move the account up or down to drag and drop it to a new position.

4. Click Save to save the changes.