Dashboard

Quick Reference Guide
1. Quick access to the Message Center where you can securely message INTRUST Treasury Services.

2. Quickly navigate to Account information, Payment tasks, Reporting, and Admin tasks if in an admin role.

3. Feature widgets: Information Center and Resource sections provide quick access to tools and timely information.
Manage the Accounts Widget

Accounts widget for quick access to the account(s) and balances you frequently manage.

To set up this widget:

1. Click Manage Accounts.
2. Click the pencil icon next to the current/default Group name.
3. Key in the new group name and click Rename Group.
4. The new group name displays.
In addition to managing the accounts for viewing within the widget, you can also customize the name of the account groups.

1. Click **Manage Groups**.
2. Click **Add Accounts**.
3. Select the accounts from your list and click **Add Accounts**.

You can do this for up to 20 groups and add up to 50 accounts per group.

4. The number in parenthesis next to the group name is how many accounts are in that group.
In addition to seeing key balance information within the Accounts widget, you can drill further to view transaction information.

1 Click **Details** and a new window will pop up over the dashboard that provides recent transactions.

2 If you want to view more details, you can quickly navigate by clicking **View Account Transactions**. This takes you from the Dashboard to the Account List feature where you can complete further research.
Customizing your Dashboard

1. Click **Configure Dashboard**
2. A new view displays
3. Add widgets
4. Remove widgets
5. Position widgets by dragging and dropping
6. Resize widgets

As you resize and position the widgets, the dashboard will automatically show you how the changes impact widget arrangement.

7. Don’t forget to click **Save** for your changes to take effect.
Adding Widgets

1. Click Add Widget

You will now be presented with the widgets available to you.

2. Click Add Widget for each one you wish to see on your dashboard.

3. Click Add Widgets and you will be presented with a layout that you can now adjust.

4. Don’t forget to click Save for your changes to take effect.
Your new Dashboard is now customized