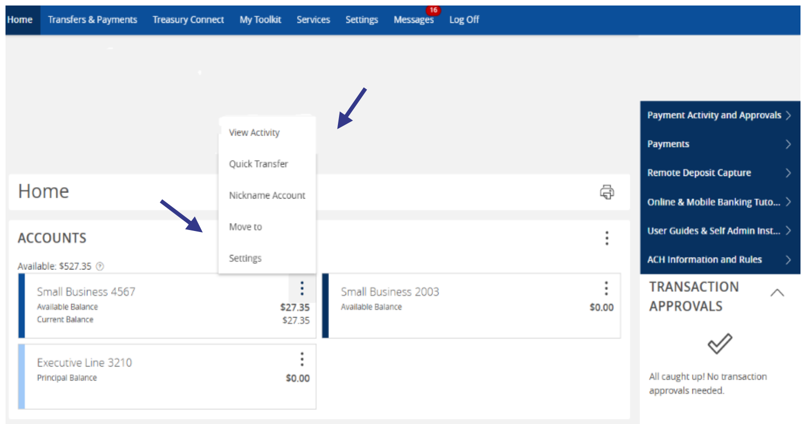
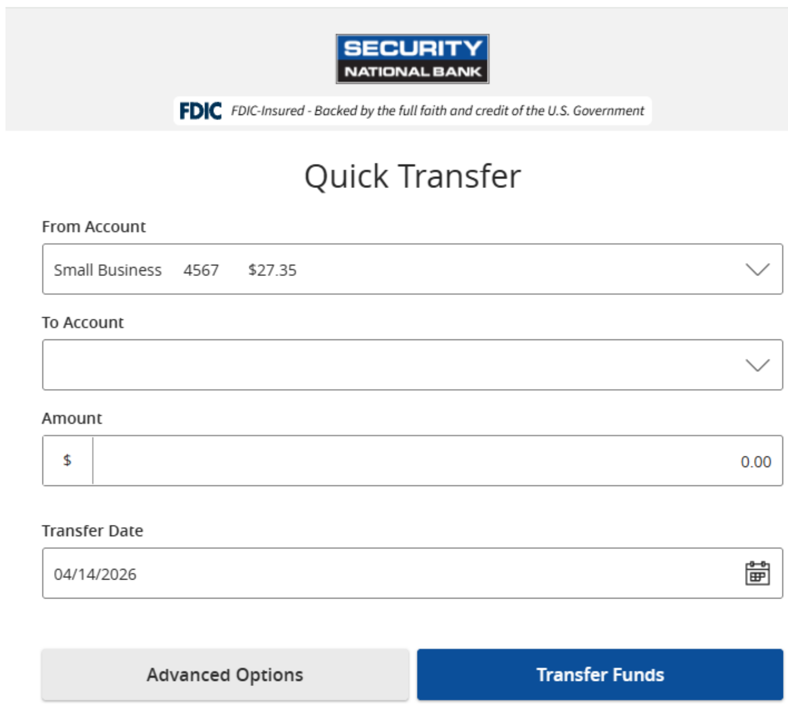
## Corporate Homepage View

1. View a listing of accounts accessible within Digital Banking.
2. Click the horizontal dots on any account to access the “View activity”, create a “Nickname” or “View Settings”.



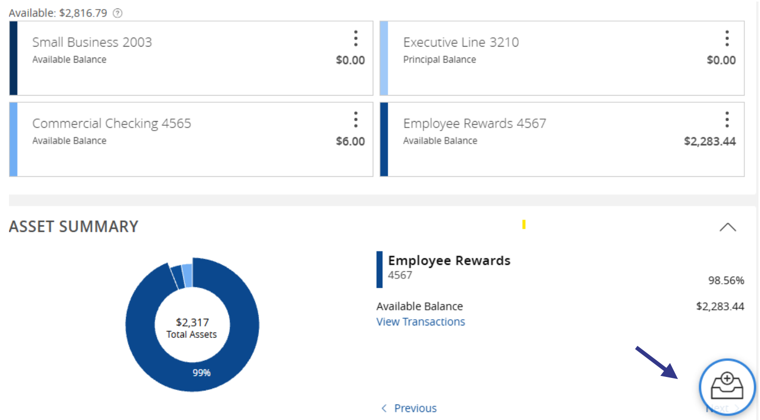

3. You also have the option to perform a “Quick Transfer” from within the account tile, or “Move To” a new group.
4. If you select “Quick Transfer” from the homepage, the system will default to transferring out of the selected account.

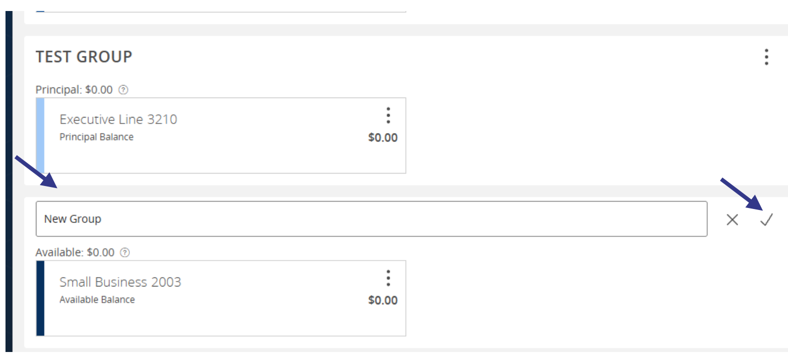



Questions? Please call our Treasury Operations Team toll-free at 877-686-3590.

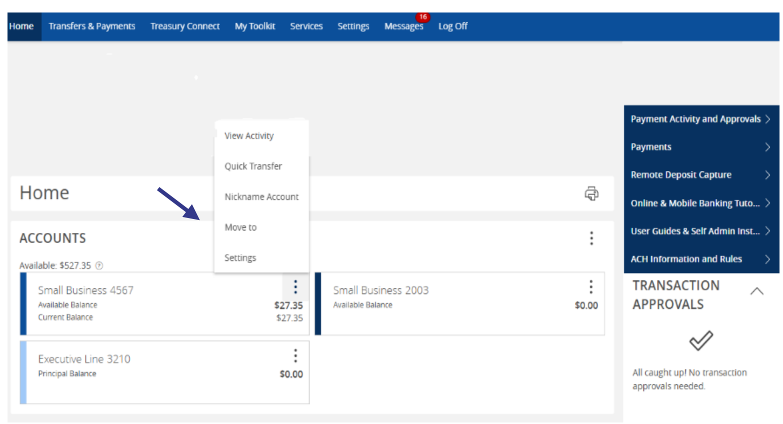
## Creating Account Groups – Tile View

1. To create an Account Group, click and drag on an account tile until the Inbox Icon with a plus sign appears. Drag the Account tile over to this symbol to start creating a new group. This will create the new group directly on the Homepage. Add the new group name and click the check mark to save.




2. A new group can also be created by clicking on the 3 dot menu on any account tile and selecting "Move To" If no groups have been created yet, select "Create Group" from the menu.

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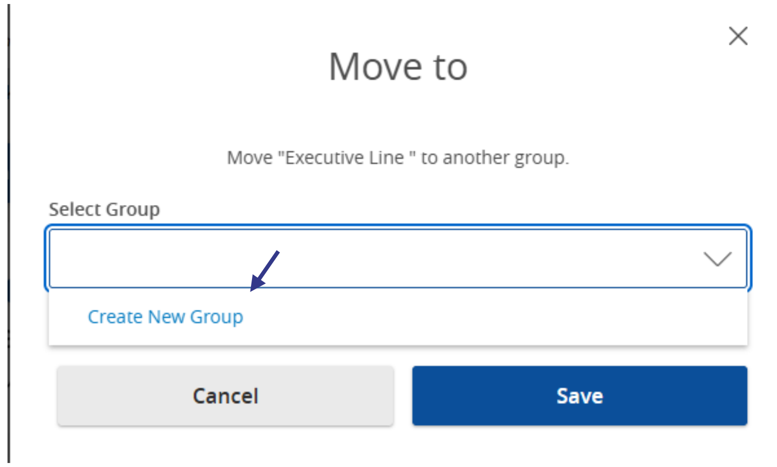
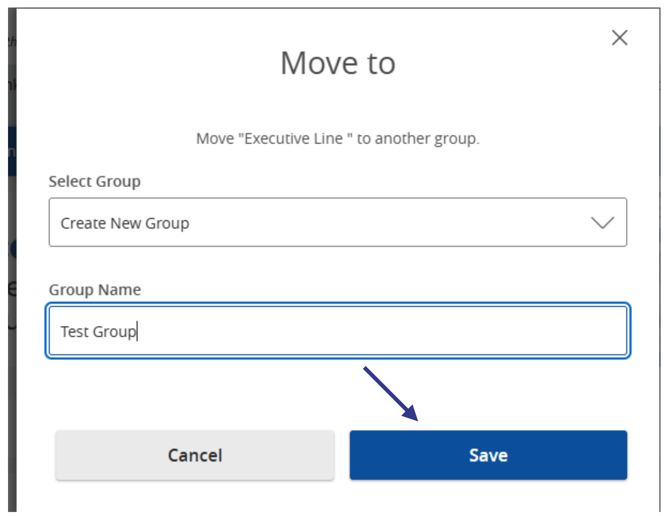
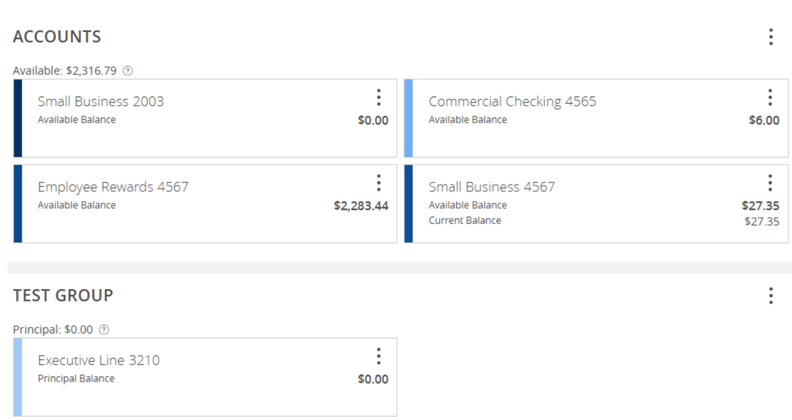



3. Add a Group Name and click ‘Save’. The Account will then be added to the new group on the Homepage.

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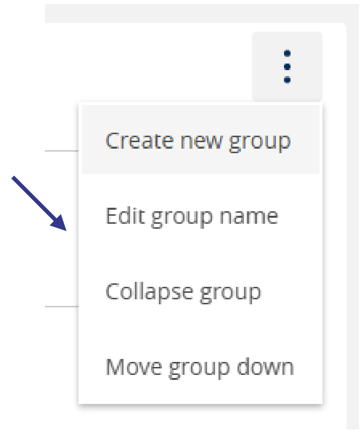
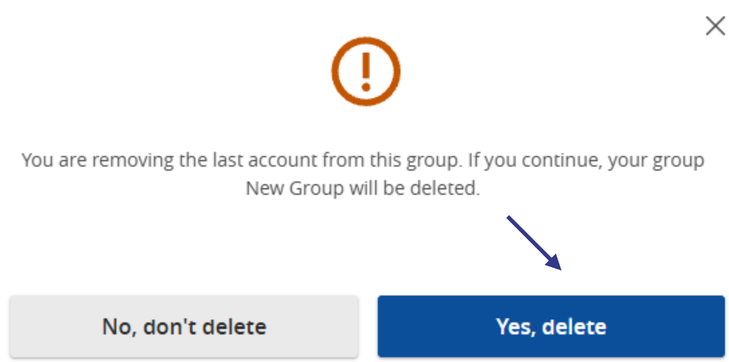
4. To change the name for a group or move it on the homepage, click on the 3-dot menu on the right hand side of the group name, and select the appropriate option.

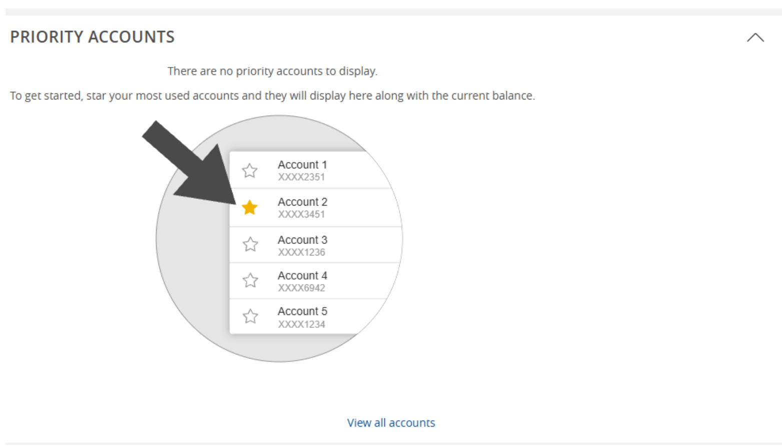



5. To remove a group, click on the last account tile in the group and drag it to the existing group to which it will be added. A warning message will pop up, click on “Yes, Delete” to move the account and delete the group.




## Creating Account Groups – Account List View

1. If the Account list view is selected due to the number of accounts, Priority Accounts must be starred in order to appear on the Homepage. Click on View All Accounts to select the accounts to appear on the Homepage.



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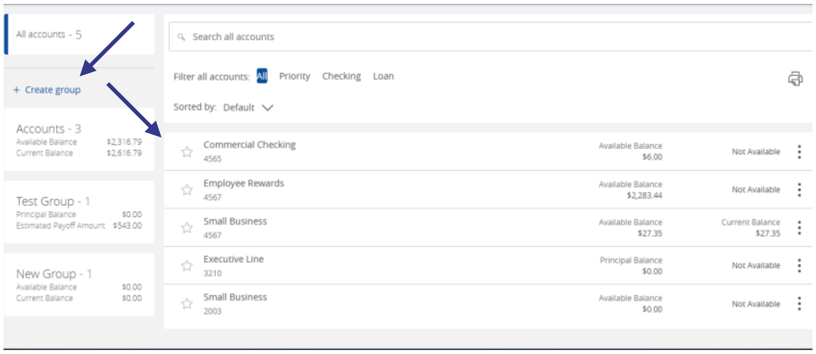
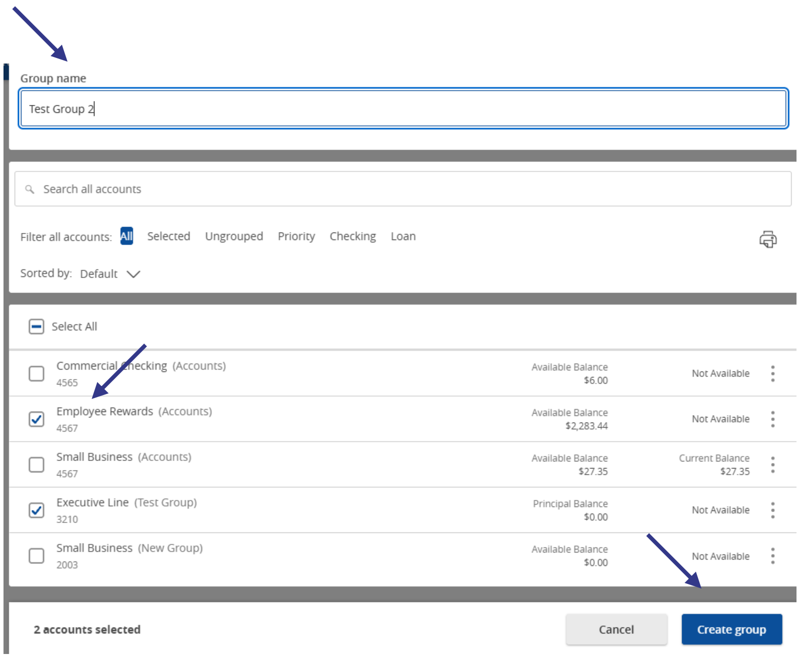
2. Click on the Star next to the account name to favorite the account.
3. New Groups will also be created on this screen. Select Create Group to add a group.




4. On the next screen, input the group name and select the appropriate accounts. Once all accounts for the group have been selected, click on 'Create Group'.

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5. To edit or remove a group once created, click on the 3-dot menu on the Group Tile and select the appropriate option. If removing a group, a warning will appear asking to confirm the group removal. Select ‘Remove Group’ to complete the process.