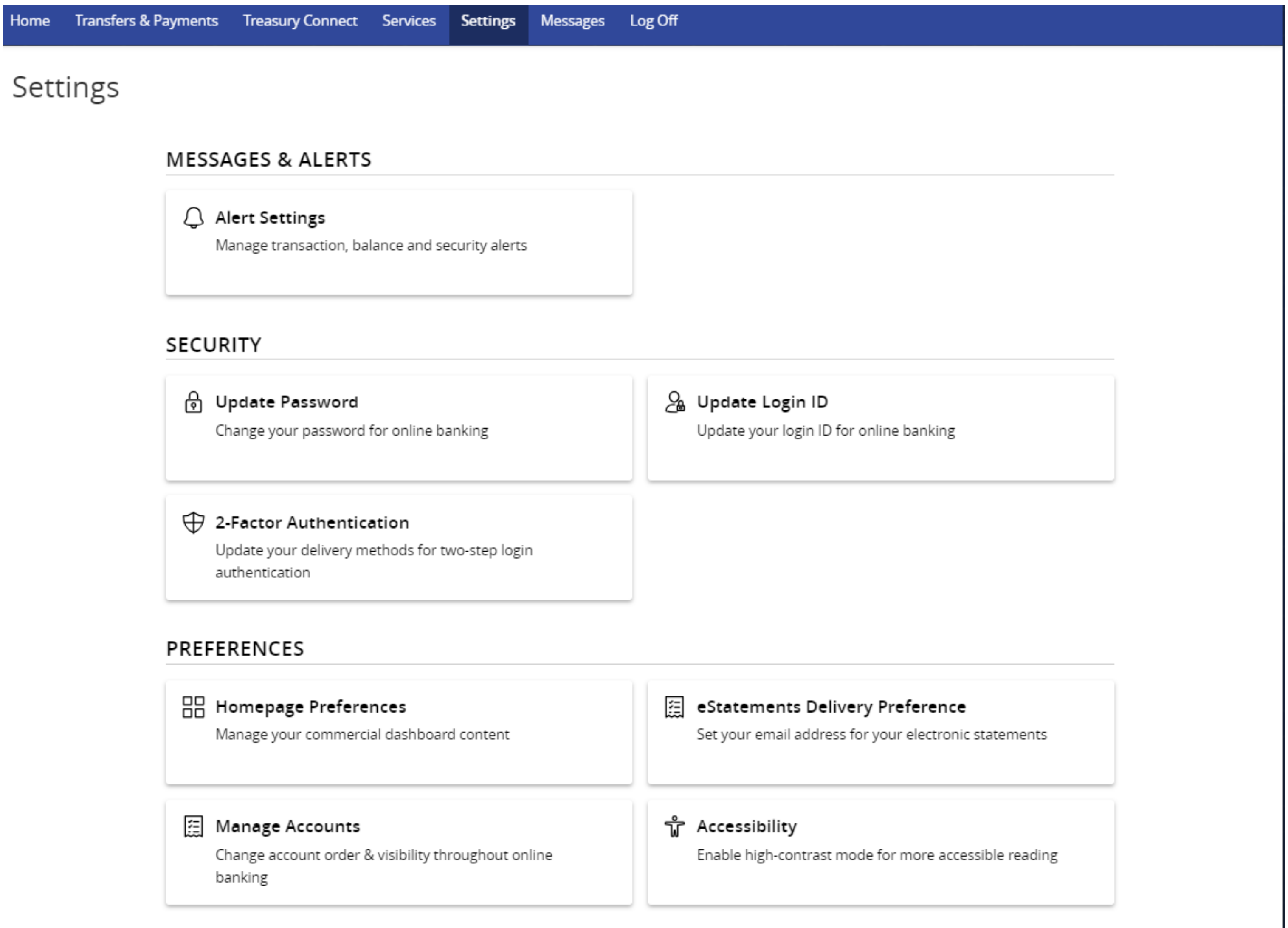
Home Page Preferences

With Commercial Dashboard enabled users can manage their Home page preferences. The Home Page Preferences page allows you to choose Quick Links and widgets you see on your Home page and opt in or out of the Account List view. This feature allows you to customize your Home page rather than having to display what Security National Bank has configured and easily access the tools that you need most. To access Home page Preferences, select Settings > Home Page Preferences in the navigation menu



Note: Your experience may be different from the user interface described based on Security National Bank's custom configuration

Grouped account balances

You can customize the visible cumulative balances in each group. This allows you to see the working capital for each account group by functional area (for example, Accounts Payable, Accounts Receivable, etc.).

You can select which account balances you want to see for each group. The account balance types you set for the first account in a group determine the balance types that display on the group tile.

To select displayed balances for an account:

1. In the navigation menu, select Settings > Account Preferences.

    1. Select an account for which you want to select displayed balances. The account details options display.
    2. Select a maximum of two balance types (for example, Available Balance and Current balance).

The group balance appears on the group tile as the total balance of all the accounts within a group.

Grouping Corporate accounts

You can use the Account Grouping feature to create groups of accounts based on your business needs.

Digital banking offers two options for viewing and grouping accounts: standard view and Account List view. Standard view allows you to see your accounts in tile view, while Account List view allows you to view accounts in a list format that is optimized for viewing and grouping large numbers of accounts.

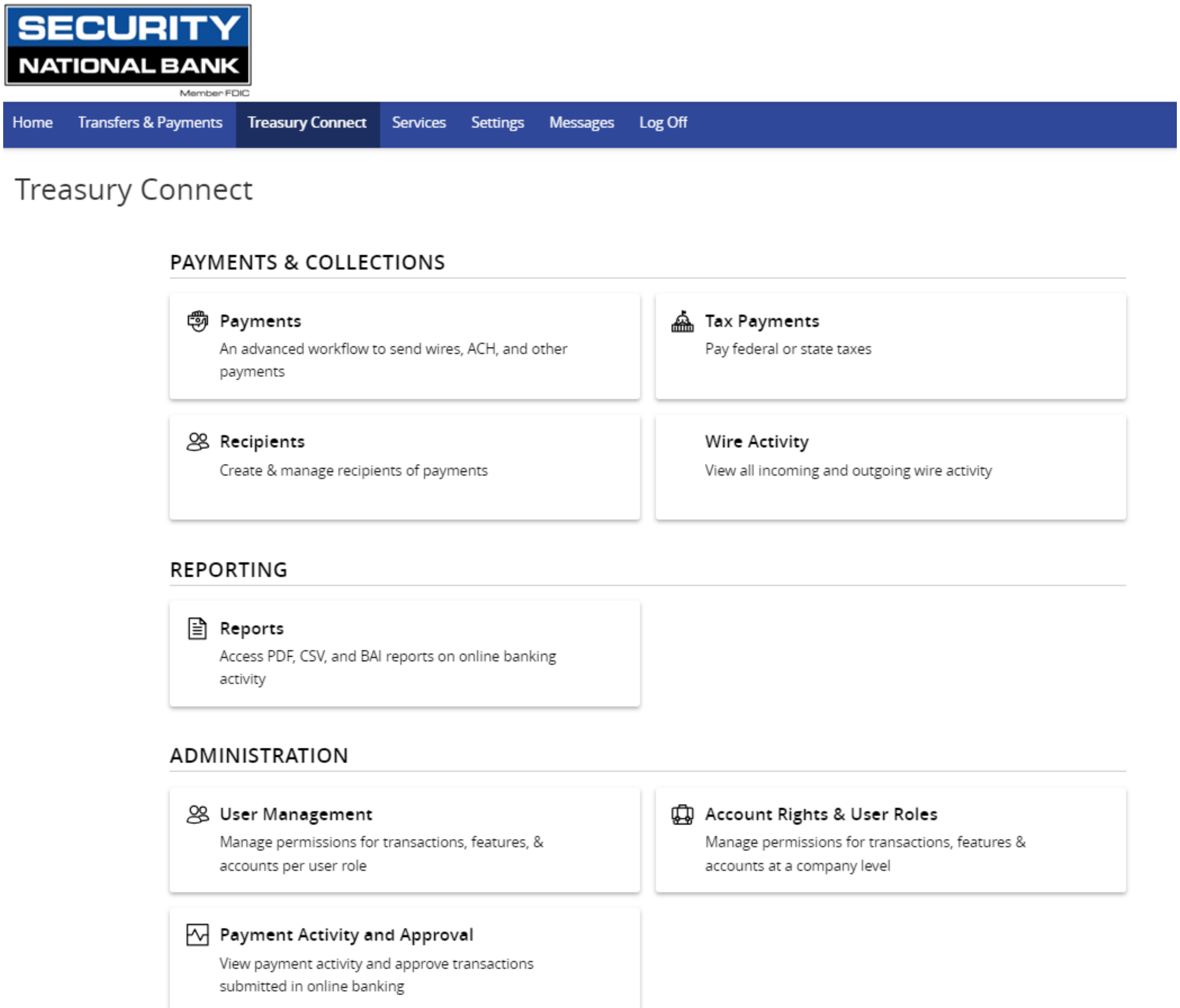
Using Account Labels

Account Labels allow a User with a high volume of accounts to label accounts into logical sets by location cost center role individual payment responsibilities etc. within the Accounts page of the Company Policy. These labels will display in each Allowed Action creation (Company and User Role Policies) and Information Reporting. While Account Labels can be visible to other Users in the application such as Users that have Manage User Roles or Information Reporting feature rights enabled, the ability to create and edit Account Labels is only applicable to the User with the Manage Company Policy feature right enabled.

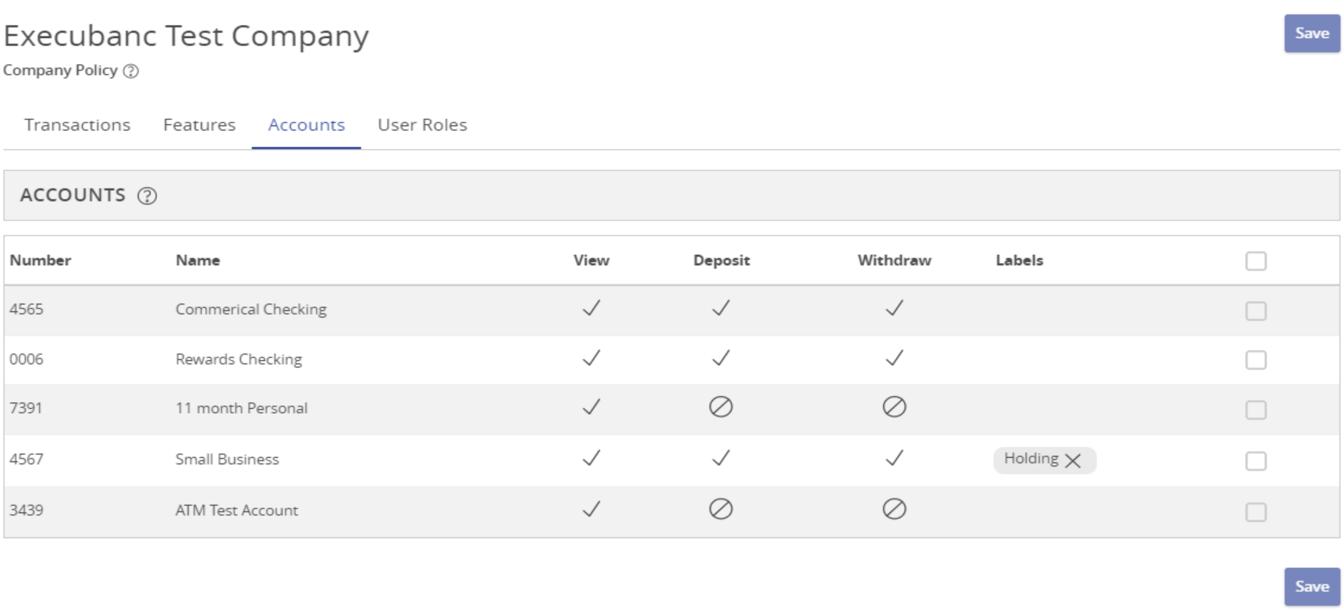
Account Labels work differently than Account Groups on the Home page Multiple accounts can share the same label for example Label has accounts x and y but Label has accounts x y and z however each account must be in a single Group on the Home page This is by design as labels are intended to expedite the setup of entitlements and reports whereas Groups are intended to organize accounts on the Home page for a User defined view of information

To create a new Account Label:

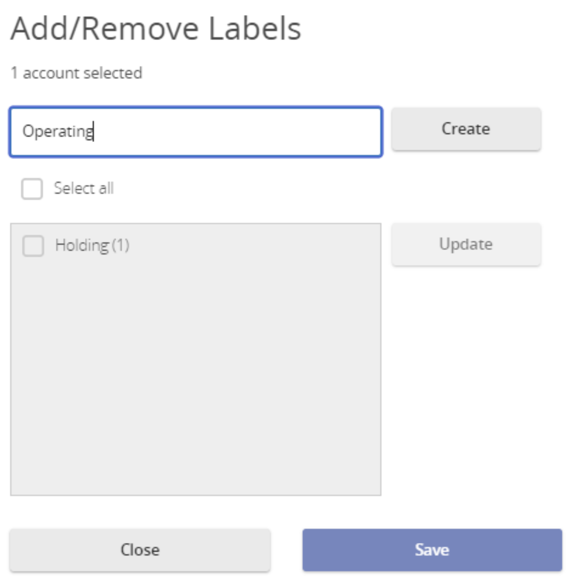
1. In the navigation menu select Treasury Connect > Account Rights and User Roles



2. Select the Accounts tab



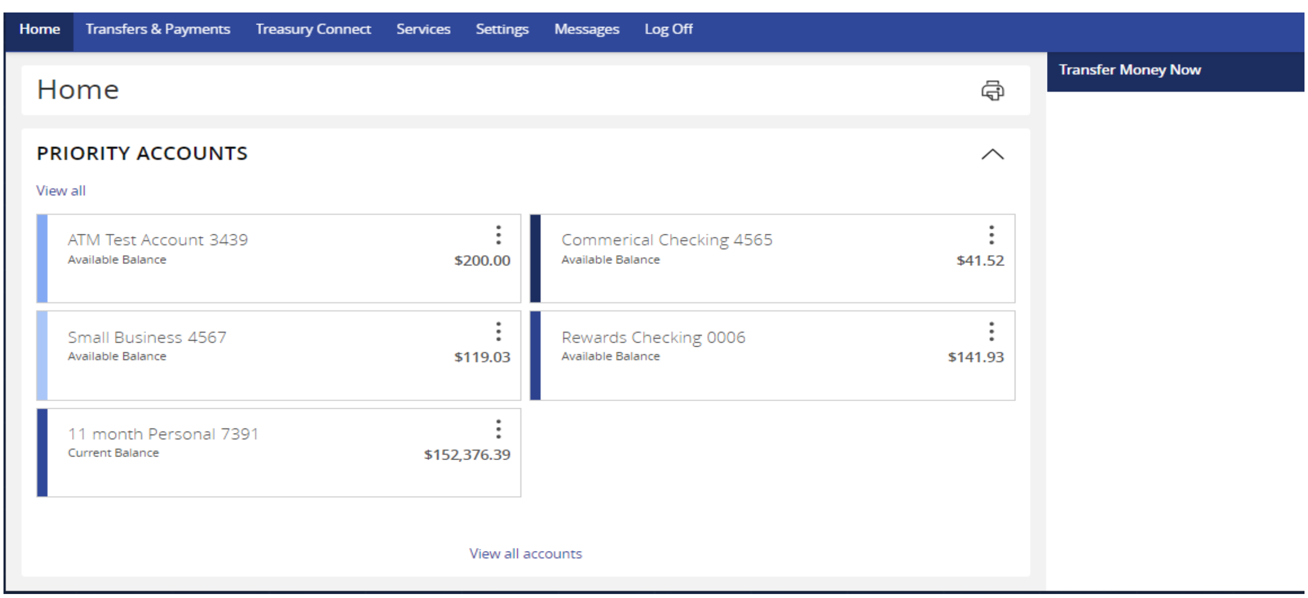
3. Select the check boxes of each account for which you want to create an Account Label then select Edit labels. Enter the name of the new label then select Create.



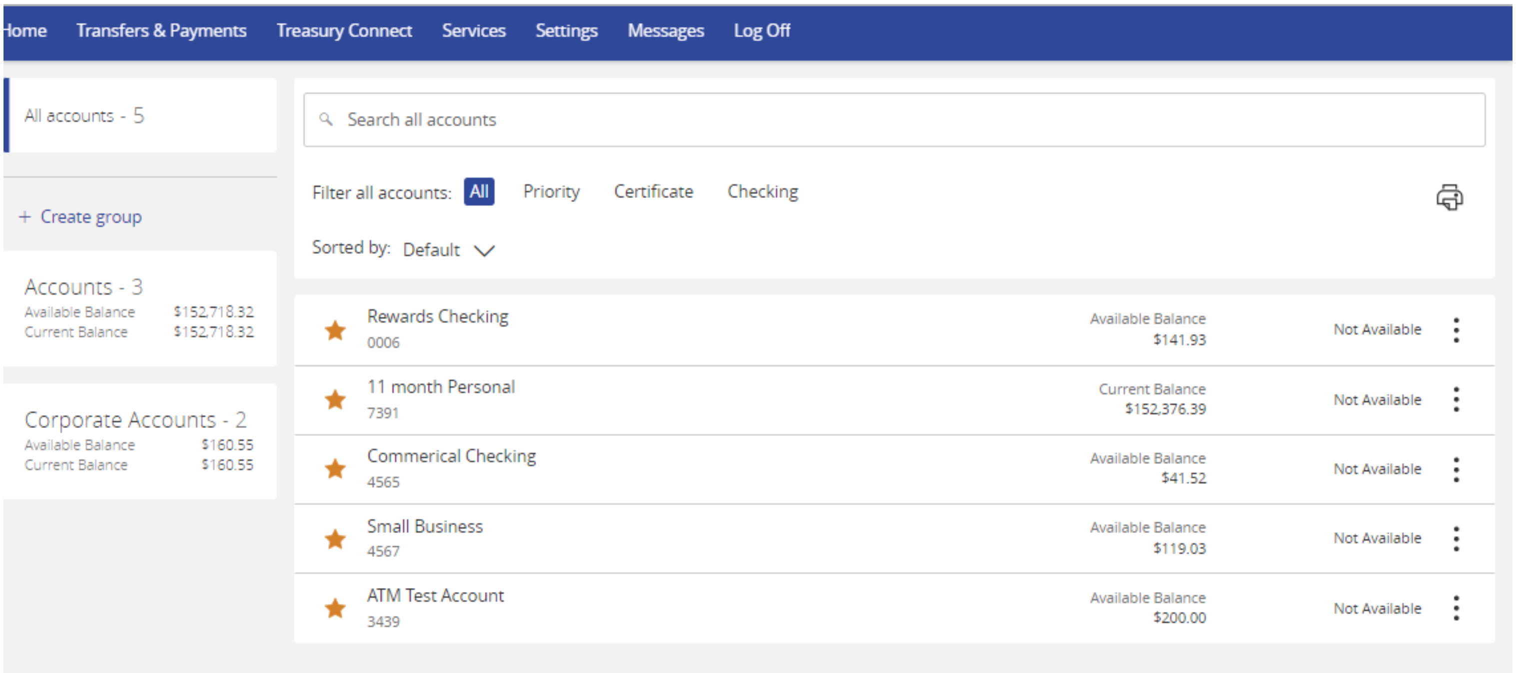
Select Update to assign that label to the selected account(s).

Create a new account group

1. From the Home page, select View all accounts.

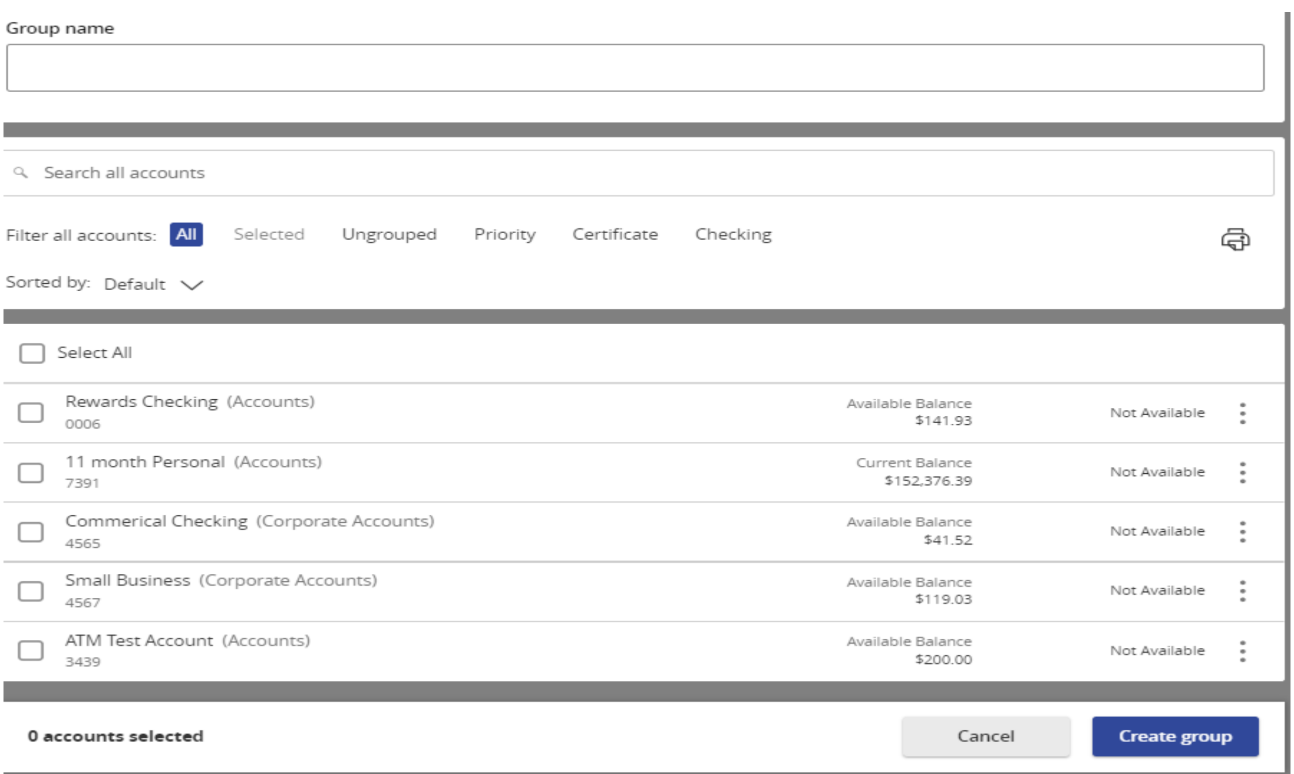


2. Select Create group.

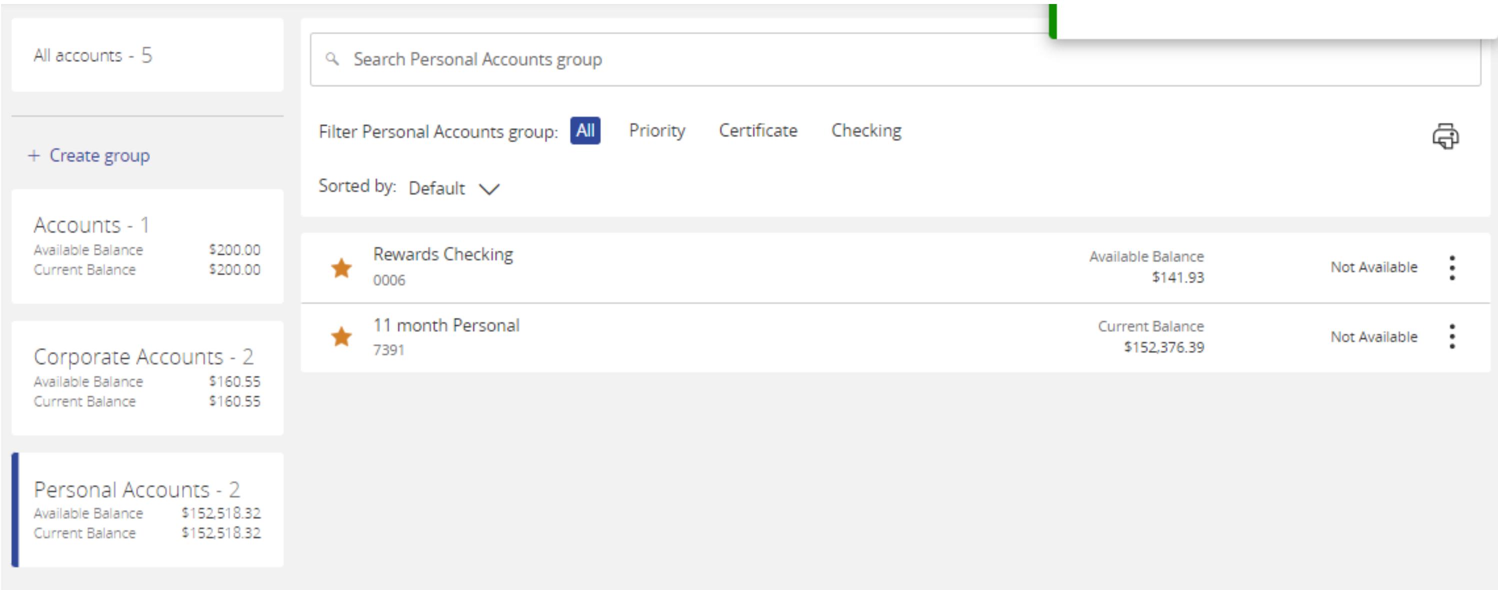


3. In the Create new group window, select the account to add to the new group and enter a Group Name. (Optional) Use the search box to find an account.

4. Select the check box next to the accounts you want to add to the group.



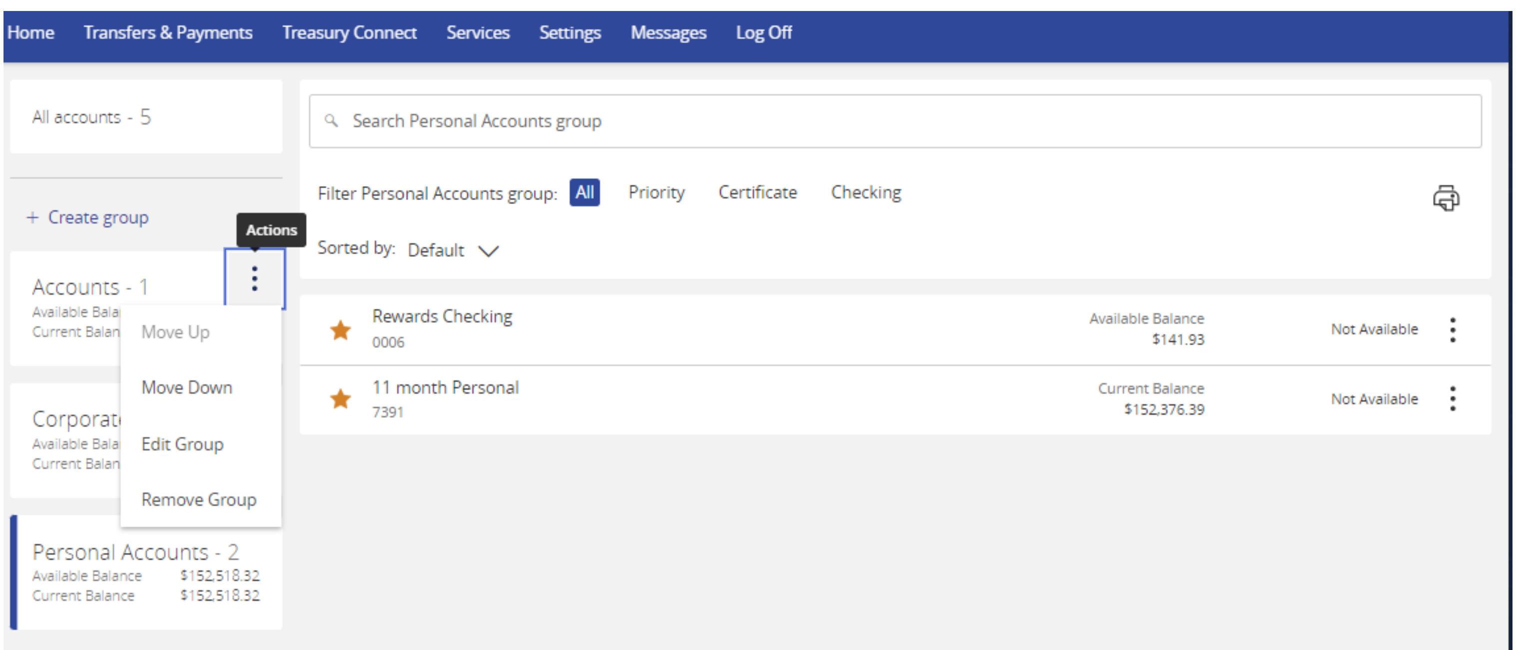
3. Select Create Group. The new group appears below any existing account groups.



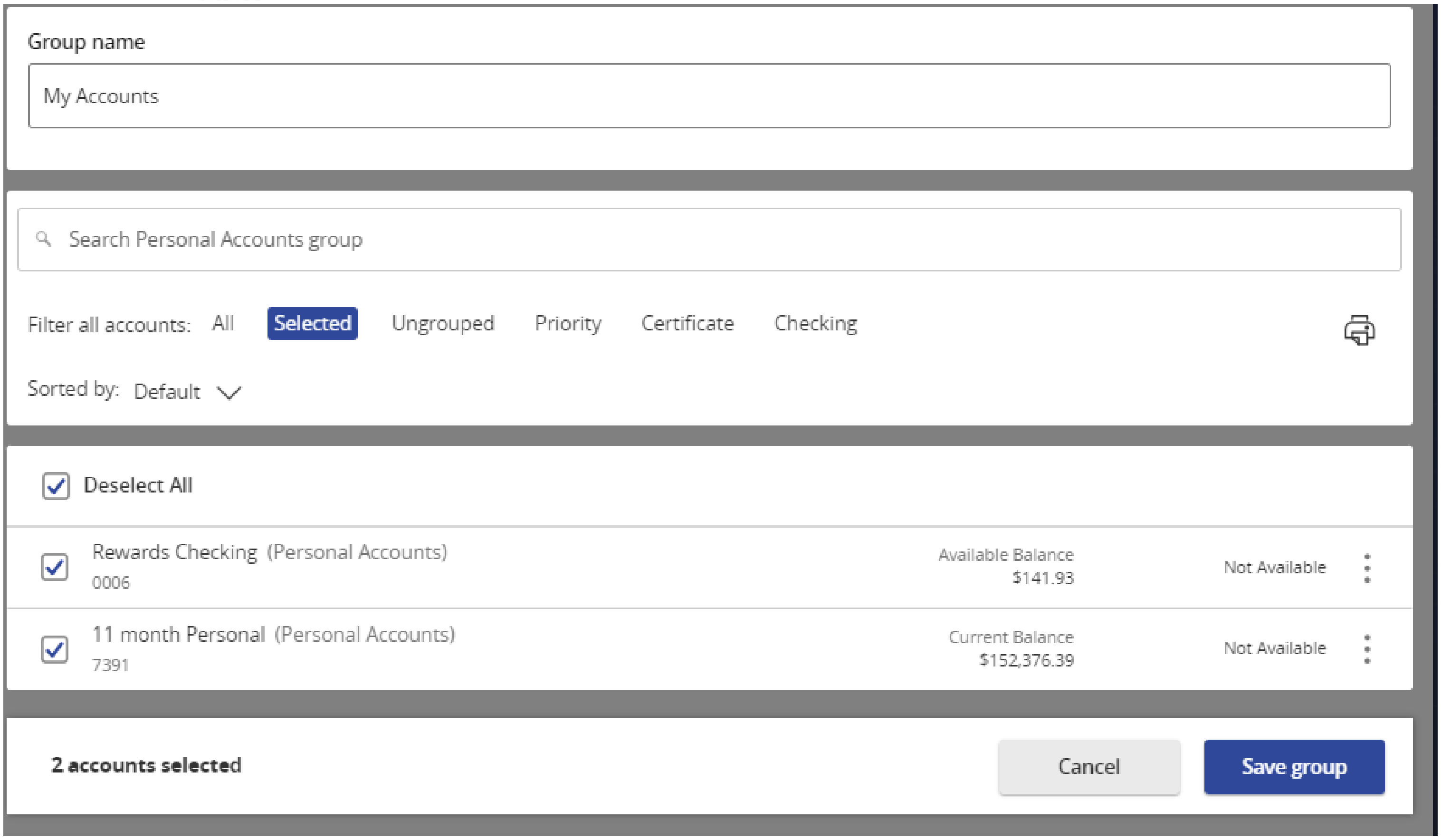
7. (Optional) To add additional accounts to the group, drag and drop an account from the list onto the group tile.

To edit an account group name

4. Select the Options menu (3 dots) on an existing group and select Edit group name.



5. Enter the new group name and select Save Group to save it.



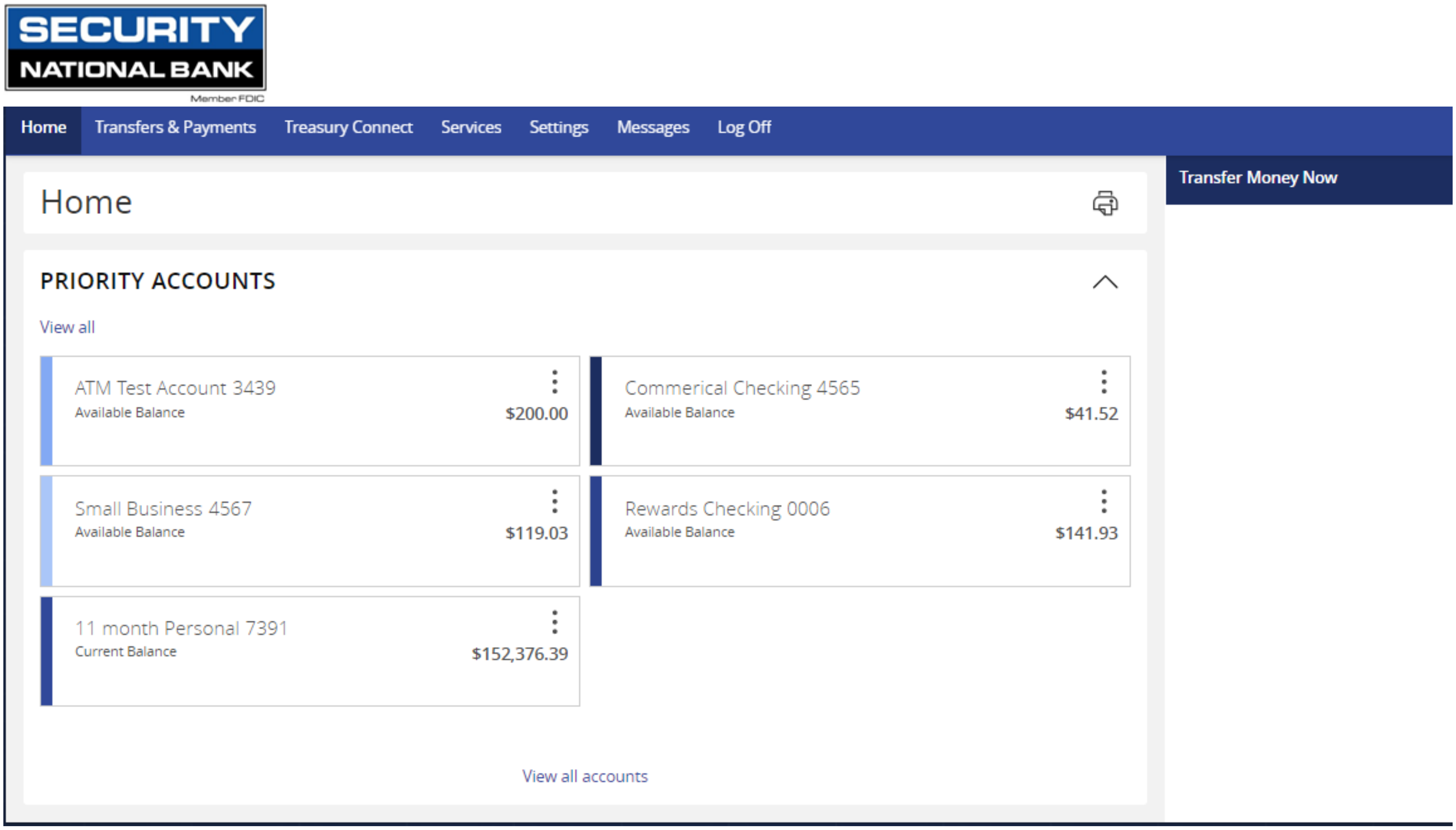
Managing groups

You can perform the following additional actions with groups on the Home page:

- Add additional accounts to a group by dragging them to the new group.
- Change the order of groups using (⋮) > **Move group up** and (⋮) > **Move group down**.
- Hide the cards within a group by selecting (⋮) > **Collapse group**.

Create a nickname in Account list view

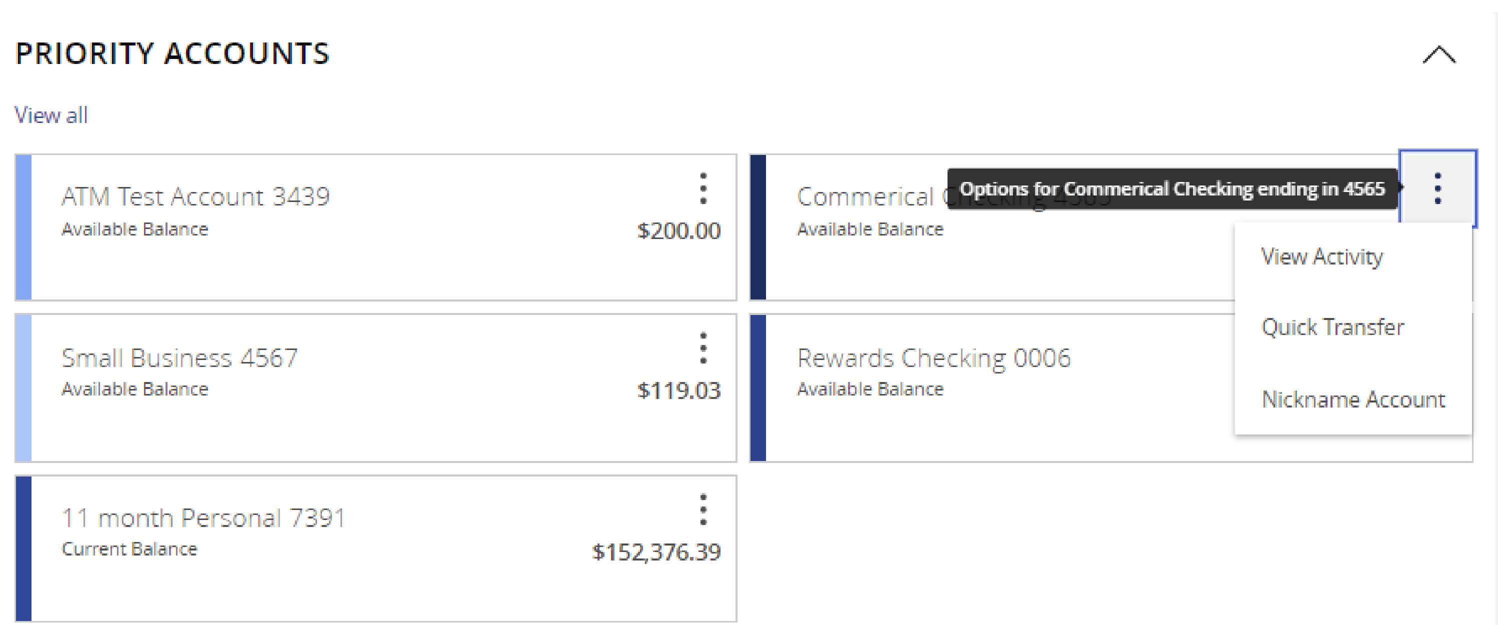
1. From the Home page, select View all accounts.



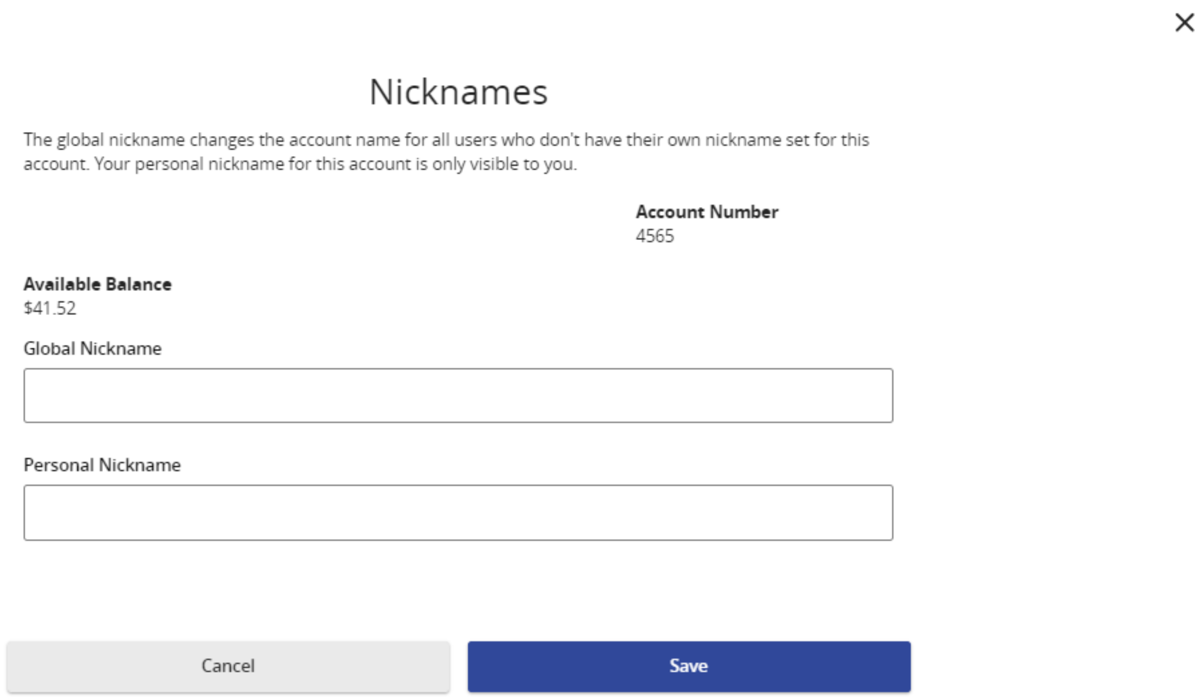
6. Find the account you want to set a nickname for and select Options (⋮).

Tip: If you want to set a nickname for a priority account, you can change the nickname from the Home page.

2. Select Nickname Account.



3. (Optional) If you have the Manage Users right or Manage User Roles feature enabled, you can set a Global Nickname for the account. Setting a global nickname changes the account display name for all users who do not have their own nickname set for the account.



4. (Optional) Enter a Personal Nickname for the account. Personal nicknames are only visible to you.
5. Select Save.