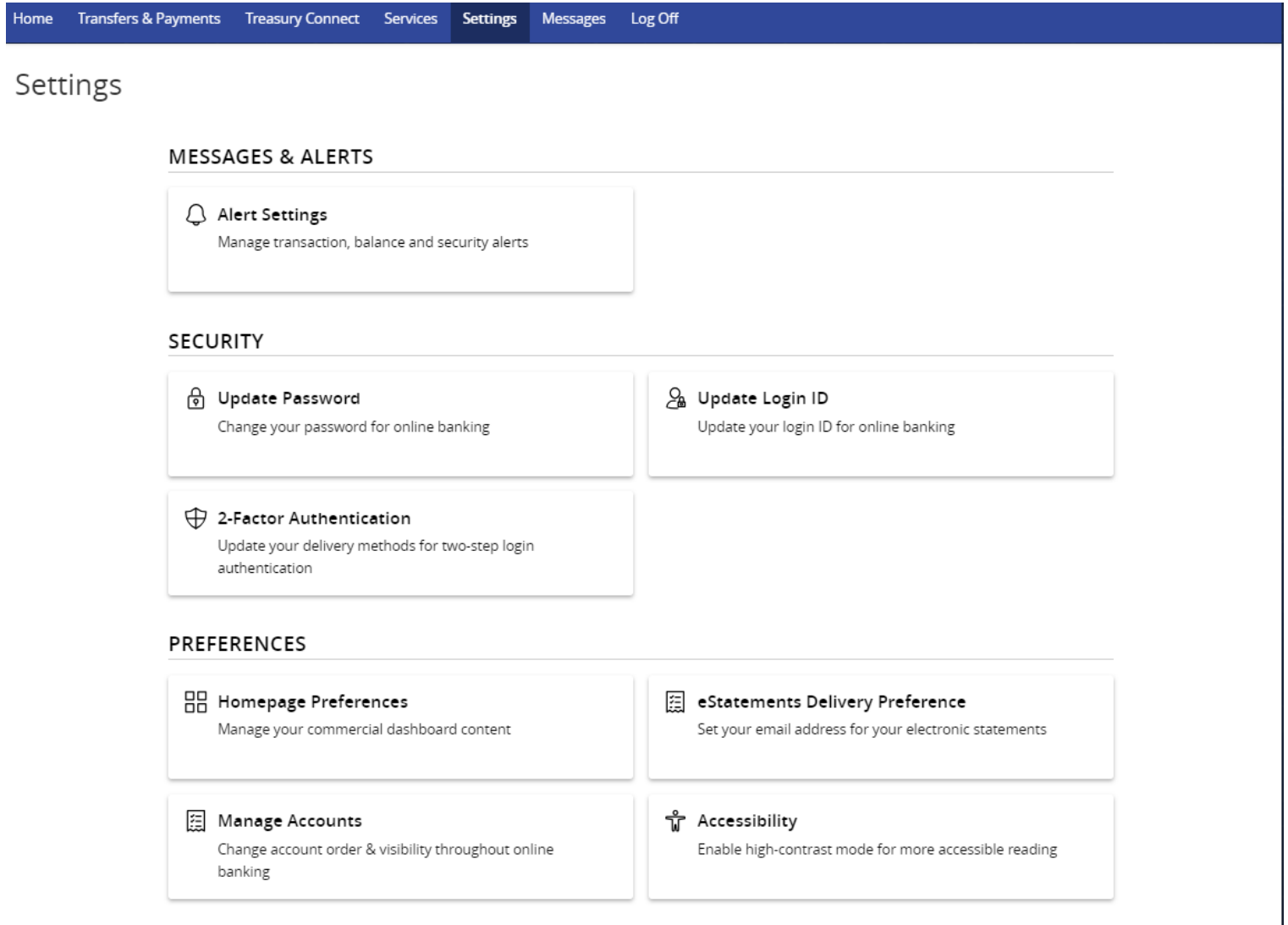


Home Page Preferences

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



The screenshot shows the 'Settings' page of the Security National Bank interface. At the top is a navigation bar with links for Home, Transfers & Payments, Treasury Connect, Services, Settings (highlighted), Messages, and Log Off. Below the navigation bar is the 'Settings' section, which is divided into three main categories: MESSAGES & ALERTS, SECURITY, and PREFERENCES. Each category contains several interactive cards with icons and descriptive text.

MESSAGES & ALERTS

- Alert Settings**
Manage transaction, balance and security alerts

SECURITY

- Update Password**
Change your password for online banking
- Update Login ID**
Update your login ID for online banking
- 2-Factor Authentication**
Update your delivery methods for two-step login authentication

PREFERENCES

- Homepage Preferences**
Manage your commercial dashboard content
- eStatements Delivery Preference**
Set your email address for your electronic statements
- Manage Accounts**
Change account order & visibility throughout online banking
- Accessibility**
Enable high-contrast mode for more accessible reading

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

Treasury Connect

PAYMENTS & COLLECTIONS

Payments An advanced workflow to send wires, ACH, and other payments	Tax Payments Pay federal or state taxes
Recipients Create & manage recipients of payments	Wire Activity View all incoming and outgoing wire activity

REPORTING

Reports
 Access PDF, CSV, and BAI reports on online banking activity

ADMINISTRATION

User Management Manage permissions for transactions, features, & accounts per user role	Account Rights & User Roles Manage permissions for transactions, features & accounts at a company level
Payment Activity and Approval View payment activity and approve transactions submitted in online banking	

2. Select the Accounts tab

Execubanc Test Company

Save

Company Policy ?

Transactions Features **Accounts** User Roles

ACCOUNTS ?						
Number	Name	View	Deposit	Withdraw	Labels	
4565	Commerical Checking	✓	✓	✓		<input type="checkbox"/>
0006	Rewards Checking	✓	✓	✓		<input type="checkbox"/>
7391	11 month Personal	✓	⊘	⊘		<input type="checkbox"/>
4567	Small Business	✓	✓	✓	Holding ✕	<input type="checkbox"/>
3439	ATM Test Account	✓	⊘	⊘		<input type="checkbox"/>

Save



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.

Add/Remove Labels

1 account selected

Select all

Holding(1)

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.

Home Transfers & Payments Treasury Connect Services Settings Messages Log Off

Home Transfer Money Now

PRIORITY ACCOUNTS

View all

ATM Test Account 3439 Available Balance	\$200.00	Commerical Checking 4565 Available Balance	\$41.52
Small Business 4567 Available Balance	\$119.03	Rewards Checking 0006 Available Balance	\$141.93
11 month Personal 7391 Current Balance	\$152,376.39		

View all accounts



2. Select Create group.

Home Transfers & Payments Treasury Connect Services Settings Messages Log Off

All accounts - 5

+ Create group

Accounts - 3
Available Balance \$152,718.32
Current Balance \$152,718.32

Corporate Accounts - 2
Available Balance \$160.55
Current Balance \$160.55

Search all accounts

Filter all accounts: All Priority Certificate Checking

Sorted by: Default

★ Rewards Checking 0006	Available Balance \$141.93	Not Available	⋮
★ 11 month Personal 7391	Current Balance \$152,376.39	Not Available	⋮
★ Commerical Checking 4565	Available Balance \$41.52	Not Available	⋮
★ Small Business 4567	Available Balance \$119.03	Not Available	⋮
★ ATM Test Account 3439	Available Balance \$200.00	Not Available	⋮

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.

Group name

Search all accounts

Filter all accounts: All Selected Ungrouped Priority Certificate Checking

Sorted by: Default

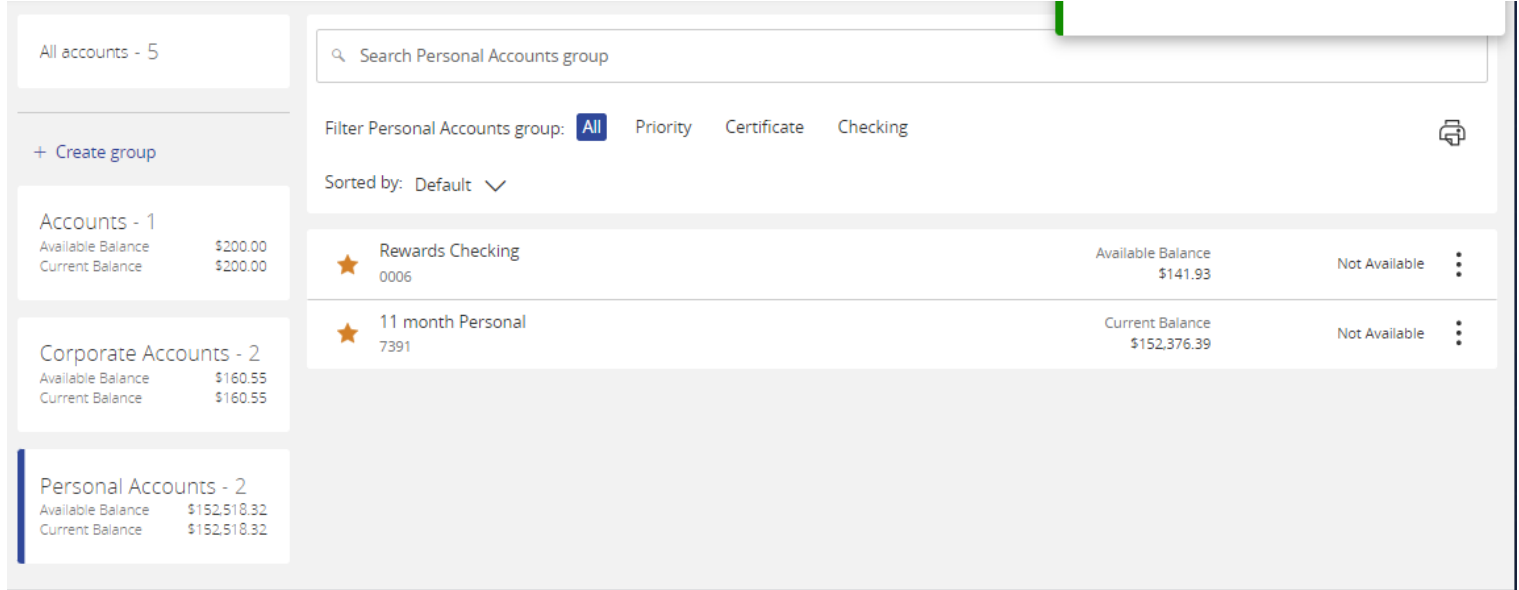
Select All

<input type="checkbox"/> Rewards Checking (Accounts) 0006	Available Balance \$141.93	Not Available	⋮
<input type="checkbox"/> 11 month Personal (Accounts) 7391	Current Balance \$152,376.39	Not Available	⋮
<input type="checkbox"/> Commerical Checking (Corporate Accounts) 4565	Available Balance \$41.52	Not Available	⋮
<input type="checkbox"/> Small Business (Corporate Accounts) 4567	Available Balance \$119.03	Not Available	⋮
<input type="checkbox"/> ATM Test Account (Accounts) 3439	Available Balance \$200.00	Not Available	⋮

0 accounts selected

Cancel Create group

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

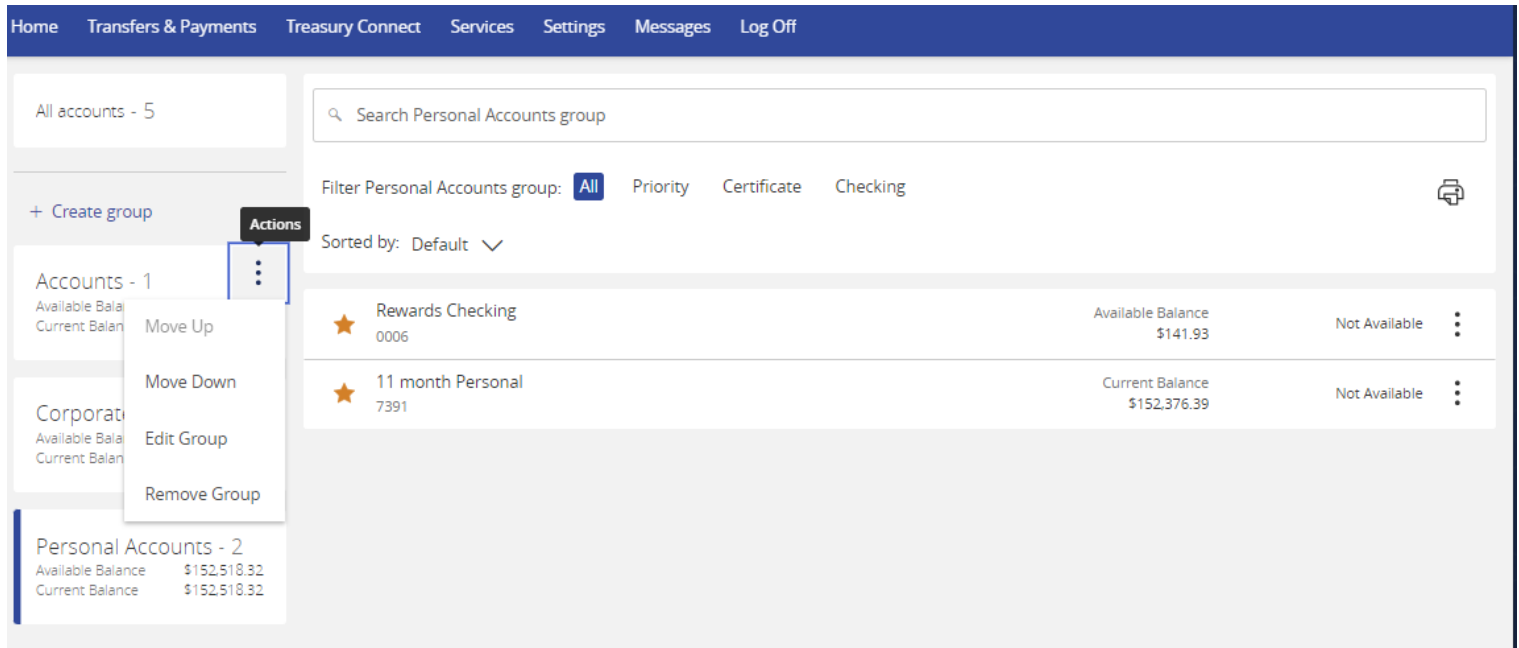


The screenshot shows a web interface for managing accounts. On the left, there are four account group tiles: 'All accounts - 5', 'Accounts - 1' (with available and current balances of \$200.00), 'Corporate Accounts - 2' (with available and current balances of \$160.55), and 'Personal Accounts - 2' (with available and current balances of \$152,518.32). A '+ Create group' button is visible. The main area features a search bar for 'Personal Accounts group', filter buttons for 'All', 'Priority', 'Certificate', and 'Checking', and a 'Sorted by: Default' dropdown. A table lists two accounts: 'Rewards Checking 0006' with an available balance of \$141.93, and '11 month Personal 7391' with a current balance of \$152,376.39. Both accounts have a 'Not Available' status and a three-dot menu icon.

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.





This screenshot is similar to the previous one but shows the 'Accounts - 1' group tile with its options menu open. The menu includes 'Move Up', 'Move Down', 'Edit Group', and 'Remove Group'. The 'Edit Group' option is highlighted. The rest of the interface, including the search bar, filters, and account list, remains the same.

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



Group name

Search Personal Accounts group

Filter all accounts: All **Selected** Ungrouped Priority Certificate Checking 

Sorted by: Default 




Deselect All

<input checked="" type="checkbox"/>	Rewards Checking (Personal Accounts) 0006	Available Balance \$141.93	Not Available	
<input checked="" type="checkbox"/>	11 month Personal (Personal Accounts) 7391	Current Balance \$152,376.39	Not Available	

2 accounts selected Cancel **Save group**

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.

Home

PRIORITY ACCOUNTS

View all

ATM Test Account 3439 Available Balance	\$200.00	Commerical Checking 4565 Available Balance	\$41.52
Small Business 4567 Available Balance	\$119.03	Rewards Checking 0006 Available Balance	\$141.93
11 month Personal 7391 Current Balance	\$152,376.39		

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.

PRIORITY ACCOUNTS

View all

ATM Test Account 3439 Available Balance	\$200.00	Commerical Checking 4565 Available Balance	\$41.52
Small Business 4567 Available Balance	\$119.03	Rewards Checking 0006 Available Balance	\$141.93
11 month Personal 7391 Current Balance	\$152,376.39		

Options for Commerical Checking ending in 4565

- View Activity
- Quick Transfer
- 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.



Nicknames

The global nickname changes the account name for all users who don't have their own nickname set for this account. Your personal nickname for this account is only visible to you.

Account Number
4565

Available Balance
\$41.52

Global Nickname

Personal Nickname

Cancel

Save

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