1st Source Bank Helpful Hints: Navigation – Configuring Dashboard Widgets

The BBO Treasury dashboard "Widgets" are customizable and can provide a snapshot of your accounts in real time as well as shortcuts to common tasks based on a user's entitlements.

Managing & Configuring Widgets

1. Upon initial log in, a default configuration of widgets is established on your BBO Treasury Dashboard. The default widgets include **Account Balances**, **Events**, **Special Reports**, **Shortcuts**, **Quick Transfers**, and **Balances Chart**.
   Note: The widgets, and the information available to a specific user, are determined by the entitlements given to each user at setup.

2. The **Account Balances** and **Quick Transfer** widgets will auto load; these do not need to be configured. However, than can be customized to meet user needs.

3. Before your organization's information will be displayed, the remaining widgets will need to be configured.

4. Click the gear icon on the top right corner of each widget. The options available may include **Edit Settings**, **Edit Actions**, **Rename Widget**, or **Remove Widget**. Each option allows the user to configure the information displayed pertaining to the widget being modified.

5. Select **Next** to progress through the setup then click **Done**. Once all the settings have been established for the specific widget.

   Below are descriptions of the different widgets:

   Account Balances: Provides account balance information for accounts you have entitlements to and the ability to perform select account actions from the Action list.
   Note: The Account Balances widget cannot be removed from the BBO Treasury dashboard.
   Events: A calendar which provides quick access to payment and transfer events scheduled in BBO Treasury.
   Special Reports: One click access to special reports configured by your organization.
   Shortcuts: Allows quick access to BBO Treasury functions based on the user's entitlements.
   Quick Transfers: Create a transfer from one deposit account to another deposit account.
   Balances Chart: A current day or prior day balance information chart for accounts based on the user's entitlements.

Note: You can organize Dashboard widgets in any manner, except for Account Balances. Organize by dragging and dropping the widget into the new location. BBO Treasury saves your widget location changes for the next time you access the dashboard.

Adding A Widget:

1. To add additional widgets, click **+ Manage Widgets**.
2. Select any widget from the list. You may also configure the same widget more than once to display different information for an organization based on the user's entitlements.

Removing A Widget:

1. To remove a widget, click the gear on the top right corner.
2. Choose **Remove Widget**
3. A warning message will verify your selection click **Delete**.

Restoring Default Settings:

1. To restore the dashboard to the default, choose the **Restore** icon next to + Manage Widgets.
2. A warning message confirms your selection, click **Restore**.
3. The dashboard is restored to the default configuration. The settings on the widgets will need to be reconfigured before displaying account information or options based on the user's entitlements.