

i-BusinessBanking™ (iBB) Dashboard Configuration User Guide

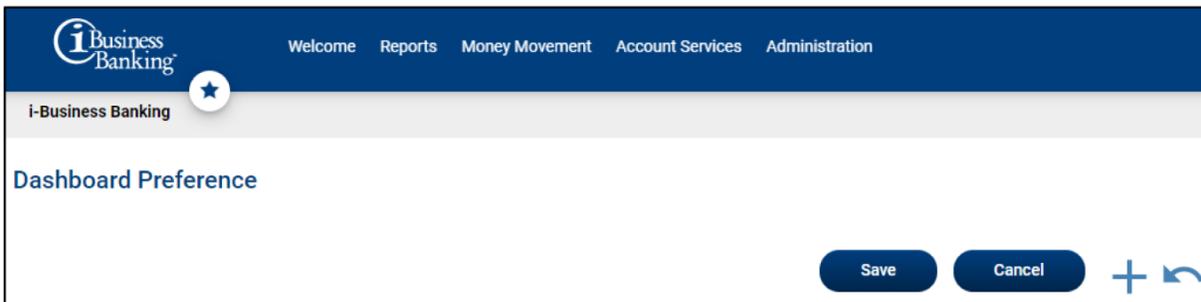
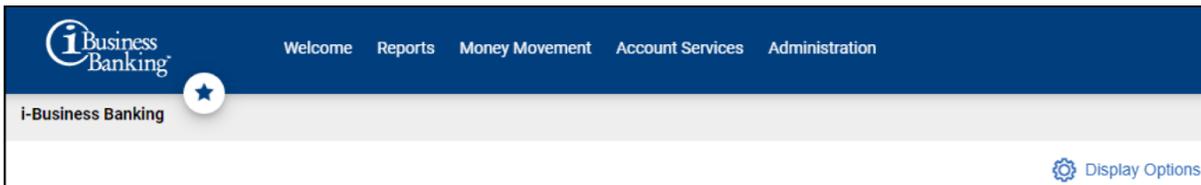
WINTRUST
TREASURY MANAGEMENT

Dashboard Configuration

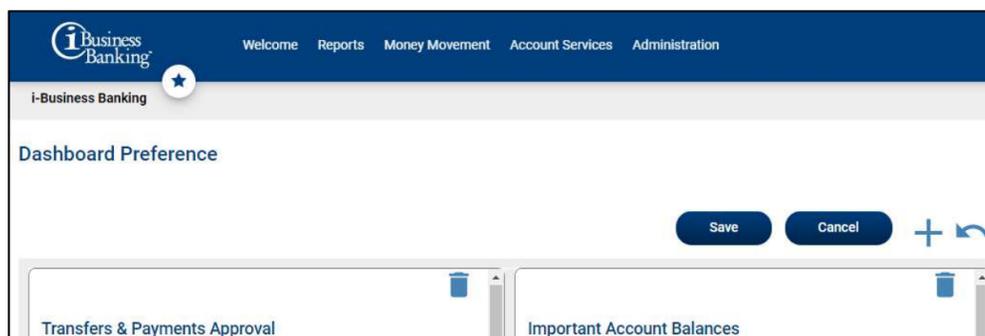
Users may need to re-configure their Dashboard the first time they log in to the new application.

To Add Panels

1. Dashboard panels are defaulted based on a user's account and service entitlements.
2. To add additional panels, click on the Display Options wheel in the upper right hand side of the Welcome page, then press the plus symbol to add the panels you would like to see.



3. The panels can be arranged on the page to your preference. To move a panel, you will need to be within the Display Options page. Hover over the panel and click to drag and drop it.
4. Click Save to save the changes.
5. To delete an existing panel, click on Display Options and click the trashcan the in upper right hand corner of the panel.



To Add Accounts

1. To add accounts to panels, click on the Edit Accounts Displayed wheel on the middle left hand side of the panel.
2. In the Account drop down menu under Choose Account, select the account(s) you would like displayed on the dashboard. You must do this for each applicable account type tab (i.e., Checking, Saving, Loan, etc.). There is no limit to the number of account panels that you can add to the dashboard, but only seven accounts are displayed at a time in each panel.

Edit Accounts Displayed

Checking

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location. You may select up to 7 accounts for each account type.

Choose Account

Account
Select All Accounts

Search Account

Select All Accounts

Checking Test1 - *4539

Checking Test2 - *1616

3. To change the order in which the accounts will display in the panel(s), click the account under Order Accounts and move the account up or down to drag and drop it to a new position.

Edit Accounts Displayed

Checking

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location. You may select up to 7 accounts for each account type.

Choose Account

Account
Select All Accounts

Order Accounts

1 Checking Test1 - *4539

2 Checking Test2 - *1616

Save Cancel

4. Click Save to save the changes.

Got Questions? We Can Help

There are additional resource links for users found at the bottom of each page within i-BusinessBanking™ in the Got Questions tab. Clicking on the tab will pull it up and display the Treasury Management Support telephone number, along with 'How Do I?' and 'Frequently Asked Questions' links.

The Treasury Management Support team is available to assist Monday through Friday from 7:30 a.m. – 6 p.m. CST.

- Illinois Support: 847-939-9050
- Wisconsin Support: 262-369-4220
- Michigan Support: 616-494-1455

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