Online Banking – *My View* or *Payment Center* Tab

Initially, you must log on to your Online Banking. You then can select the **My View** page to be your new start page or you can let it remain as a menu option tab in Online Banking.

The **Payment Center** option is found under the Bill Payment tab and is accessible from any option with the Bill Pay tab. It is the default page that appears for options in the Bill Payment tab.

Upon visiting either **My View** or **Payment Center**, each widget (a widget is a section of the page such as "My Accounts" that create the dashboard style page when combined) individually loads while the overall page loads:


During the loading time, each widget (such as Account Balances, My Accounts, Alerts, etc.) is pulling data from a separate record, based on its function. Once all the widgets have loaded, the overall page "Loading…" gray indicator box will disappear.

If a widget cannot load for some reason, a message will display within the widget saying "unable to load widget.

My View Initial View

Upon navigating to the *My View* option, you will see Marketing ads, default widgets and page configuration options:
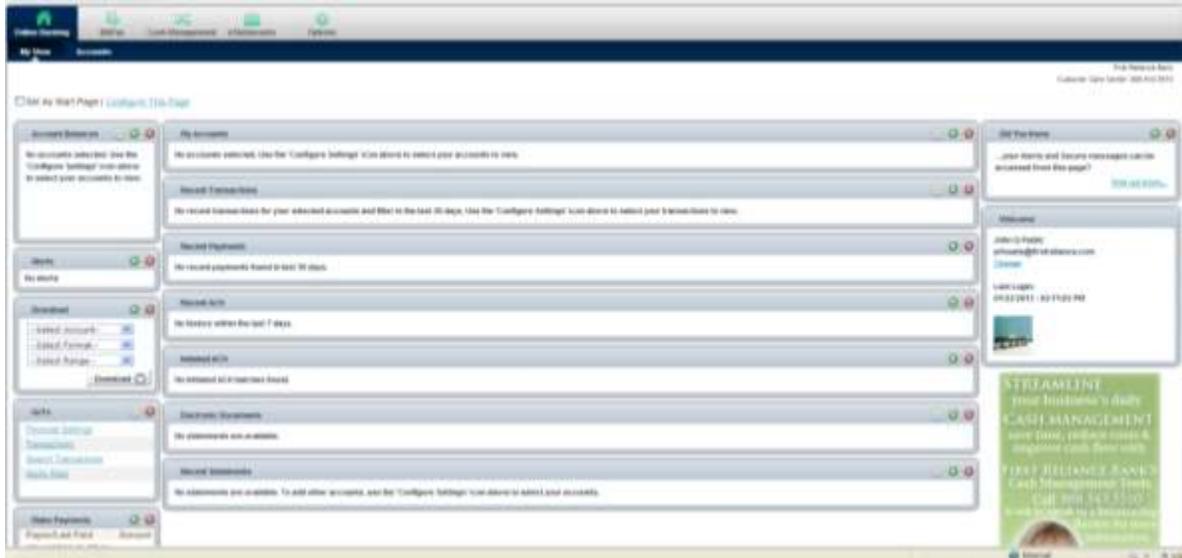
Payment Center Initial View

The *Payment Center* is housed under the Bill Pay tab in your Online Banking. *Payment Center* will only apply to users enrolled in Online Banking Bill Pay. You must have established at least one Payee before being able to access the *Payment Center* option.

Upon navigating to the *Payment Center* option, you will see default widgets and page configuration.
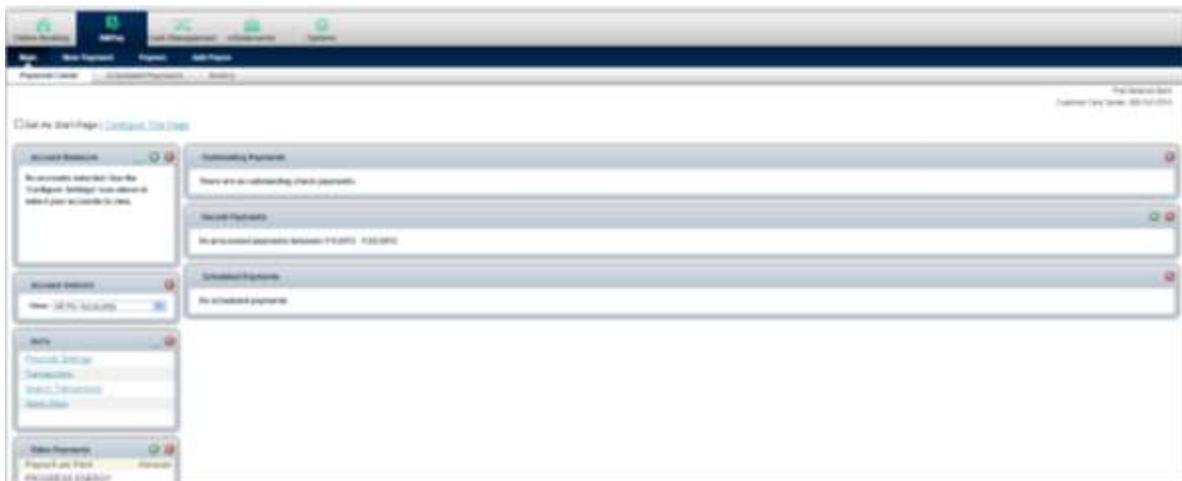
My View and *Payment Center* Page Configuration

You can configure the *My View* or *Payment Center* page with the **Set As Start Page | Configure This Page** option, which appears in the top left portion of each screen.


Set as Start Page: Check the box to select the set as start page upon your log in instead of seeing the standard Accounts page. If left unchecked, you must actively navigate to the *My View* or *Payment Center* options to access those screens.

> Note: You can always navigate to the traditional Accounts page. You can also deselect this field to restore the traditional Accounts page as the default start page when you log into Online Banking.

> Important: Only one Start Page can be selected. For example, if *My View* has already been selected as the start page, and if you then select *Payment Center* as the start page, this new selection will trump the previous selection. You would be directed to *Payment Center* upon your next log in.

Configure This Page: Upon clicking the "**Configure This Page**" link at the top of either *My View* or *Payment Center* page, you will see a window allowing control over which widgets to display on that page. Any widget not set as a default by First Reliance Bank will be listed in the right column of the window and can be added by you.
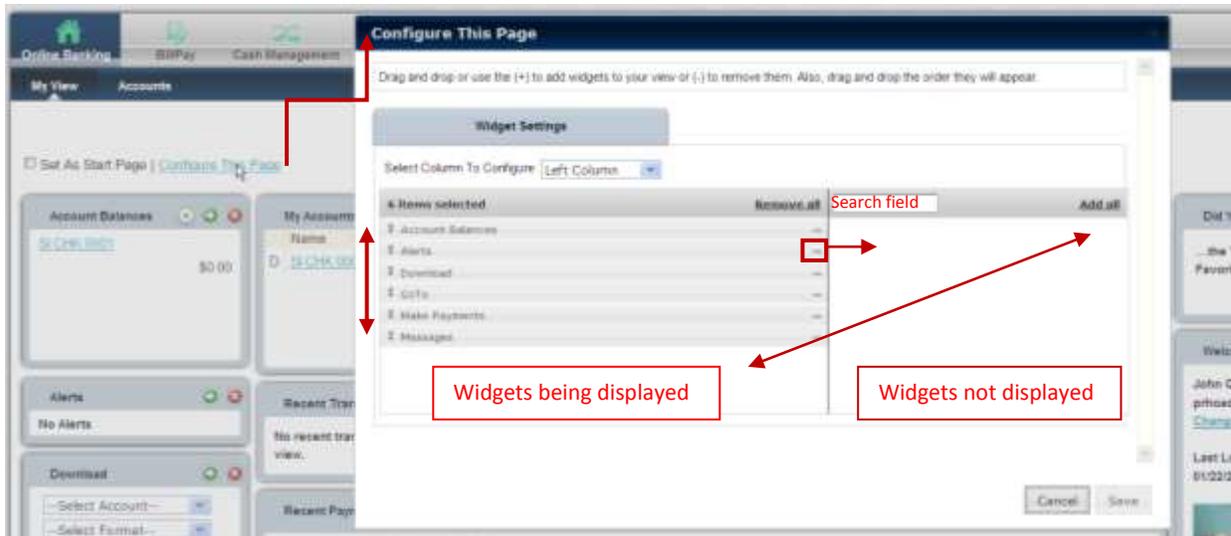
To configure the page:

Step 1: Choose a column that is on the **My View** page to work with from the **Select Column To Configure** drop-down field. The names of widgets (items) assigned to that column will appear below.

> Note: *My View* has a Left, Center and Right column; *Payment Center* has a Left and Right column. The default selection is Left Column. Widgets are assigned into specific columns on the *My View* or *Payment Center* pages and cannot be reassigned to different columns.

Step 2: Review the widgets being displayed (left side of the box in the first column.)

Step 3: Review the widgets not currently displaying (right side of the box in the second column.)

Step 4: Add or remove widgets and change the order of display, if desired.

a) You can click **minus (-)** on individual widgets to remove that widget from view. You can also click **Remove all** to eliminate all widgets from view. The removed widgets will then be listed in the right box (2nd column) for later addition.

b) You can click the **plus (+)** on individual widgets to display that widget. You can also click **Add all** to display all widgets. The added widgets will then be listed on the left side of the table in the first table column.

c) You can **search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.

d) You can **click and drag** the displaying widgets to change the order of how they appear in your list.

Step 5: Return to Step 1 until all columns have been set up.

Step 6: Click **Save** to retain changes made to all columns. The **Configure This Page** box will close and the *My View* or *Payment Center* page will reload to reflect the changes.

My View and *Payment Center* Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration pop-up window will vary based on the purpose of the widget.

> Note: The Configure icon [⚙] will not appear on widgets where configuration is not applicable.

To configure a widget:

Step 1: Click the Configure icon [⚙] on the widget. The Configure pop-up box will appear.

Step 2: Review the items being displayed (left side of table). Note: if you are configuring the widget for the first time you will not have any items on the left side.

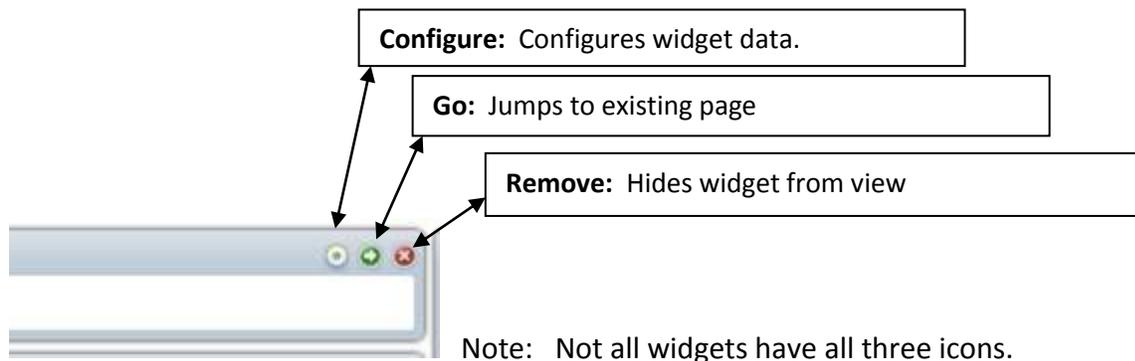**Step 3:**   Review the items not currently displaying (right side of table).

Step 4:   Add or remove items and change the order of display, if desired.

a) You can click **minus (-)** on individual items to remove that from the widget view. You can also click **Remove all** to eliminate all items from the widget view. The removed items will then be listed in the right box (2nd column) for later addition.

b) You can click the **plus (+)** on individual items to display in that widget. You can also click **Add all** to display all items. The added items will then be listed on the left side of the table in the first table column.

c) You can **search** for a non-displaying item by keying in the item name. The search box is not case sensitive.

d) You can **click and drag** the displaying items to change the order of how they appear in your list.

Step 5: Click **Save** to retain changes made to the widget. The **Configure** pop-up box will close and the widget will reload to reflect the change.

Widget Formatting

The widget formatting is as follows:

Configure: Configures widget data.

Go: Jumps to existing page

Remove: Hides widget from view

Note: Not all widgets have all three icons.

If you need additional help configuring your *My View* or *Payment Center* pages please contact our Customer Care Call Center 888.543.5510 and they'll be happy to answer any questions or guide you thru your set-up.