



## Your Digital Banking Dashboard

The People First Bank App and Online Banking were designed for quick, easy and secure banking – either on the go or from the comfort of your home.

### In this guide:

- How to customise your dashboard
- How to set a favourite account
- How to hide or show an account
- Set a nickname for an account

## Customise your dashboard

If you'd like your dashboard to look a certain way, you can rearrange it in People First Online Banking.

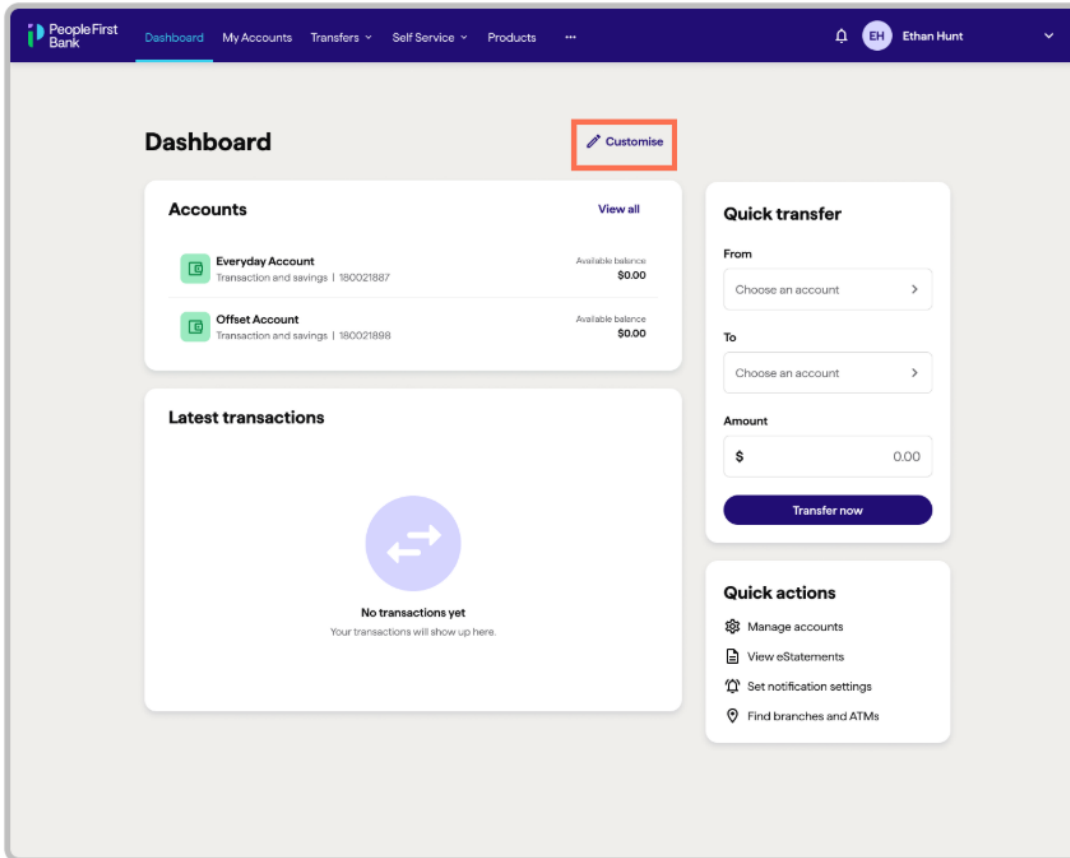
### People First Bank Online Banking

Once you've logged in to Online Banking, click on 'Customise'.

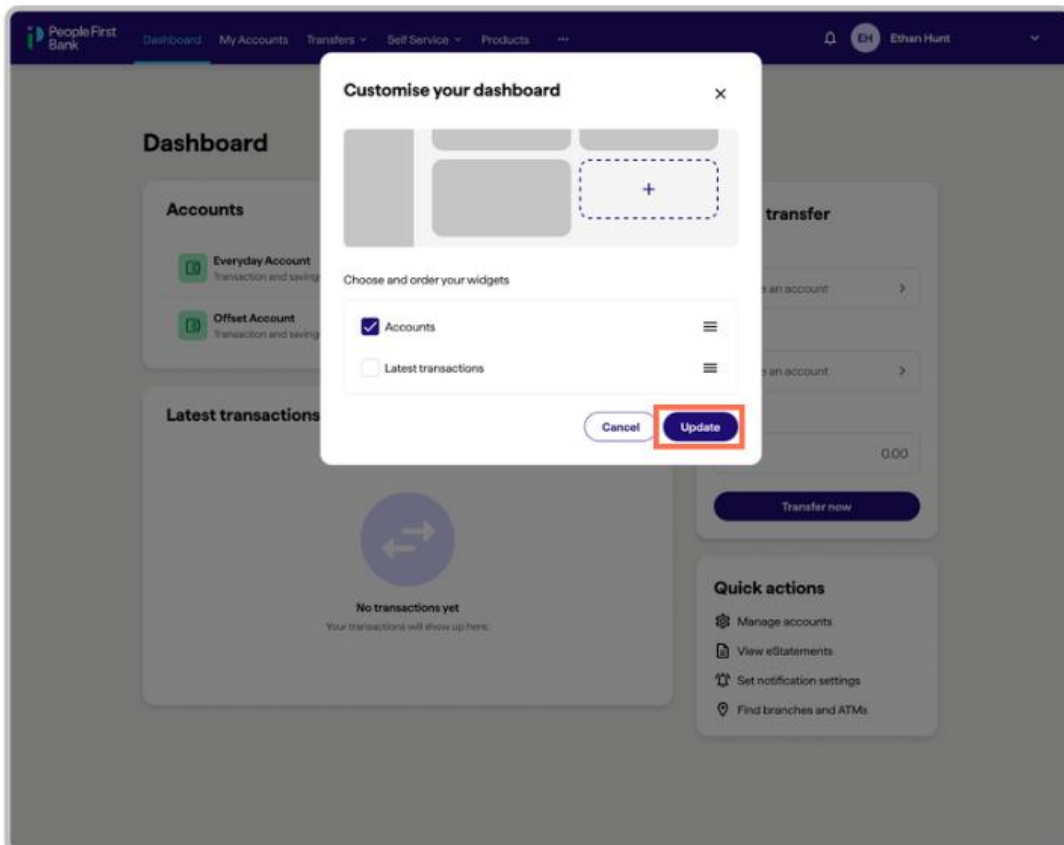
Change the order of your widgets by dragging the icons next to the widget names in your preferred order.

To remove or add a widget from your dashboard, just tick or untick the tick box beside the widget name.

Press 'Update' once you have made your desired changes.



The screenshot shows the People First Bank dashboard for user Ethan Hunt. The navigation bar includes 'Dashboard', 'My Accounts', 'Transfers', 'Self Service', and 'Products'. The main content area features a 'Dashboard' header with a 'Customise' button (highlighted with a red box). Below this are three main sections: 'Accounts' (listing 'Everyday Account' and 'Offset Account' with their available balances), 'Latest transactions' (showing 'No transactions yet'), and 'Quick transfer' (with fields for 'From', 'To', and 'Amount', and a 'Transfer now' button). A 'Quick actions' list is also visible on the right.



The screenshot shows the 'Customise your dashboard' modal dialog overlaid on the dashboard. The dialog has a title bar with a close button. It displays a visual representation of the dashboard layout with a dashed box and a plus sign indicating where a new widget can be added. Below this, there is a section titled 'Choose and order your widgets' with two options: 'Accounts' (checked) and 'Latest transactions' (unchecked). At the bottom of the dialog are 'Cancel' and 'Update' buttons, with the 'Update' button highlighted by a red box.



## Set a favourite account

We get it - we all play favourites sometimes. If you have a favourite or most frequented account, you can configure it to appear at the top of your dashboard.

### People First Bank App

Once you're logged in to the App, press 'Accounts' from the main bottom menu.

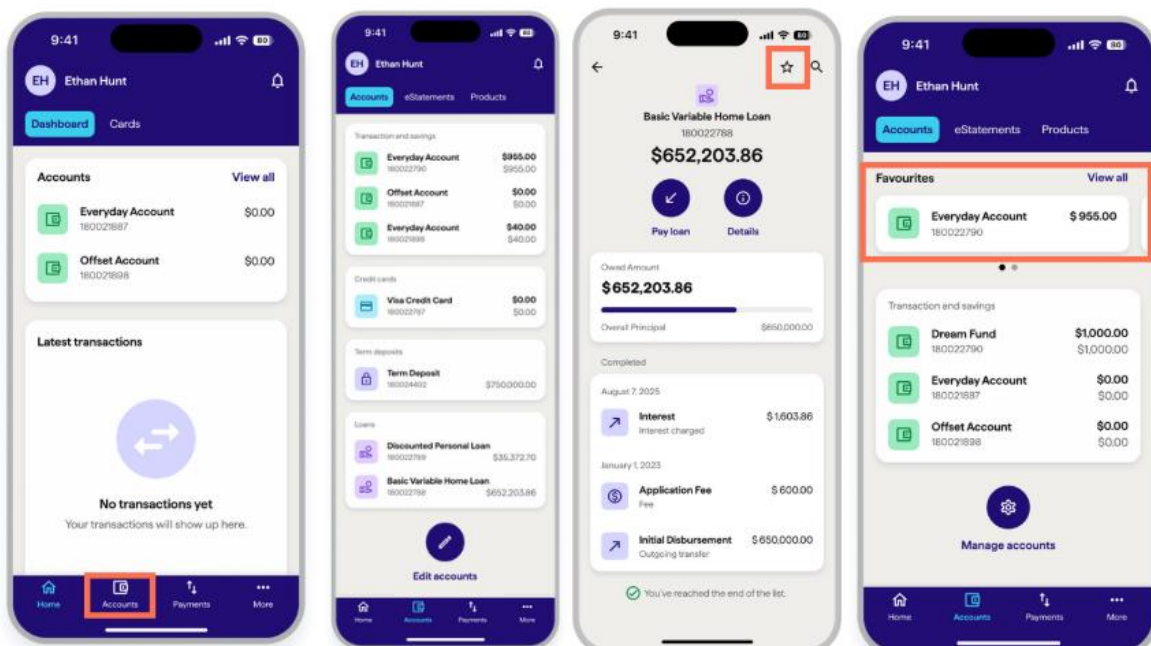
Select the account you want to add to your favourites.

Once the account is open, tap the star at the top right of the screen. Now, the account will appear as a favourite on your home dashboard.

To remove an account from your favourites, just click the star icon again.

If you have more than one account in your favourites, select 'View all' to see them all together.

Only your favourites will show on your dashboard, but you will still be able to see all your accounts in the 'Accounts' tab.





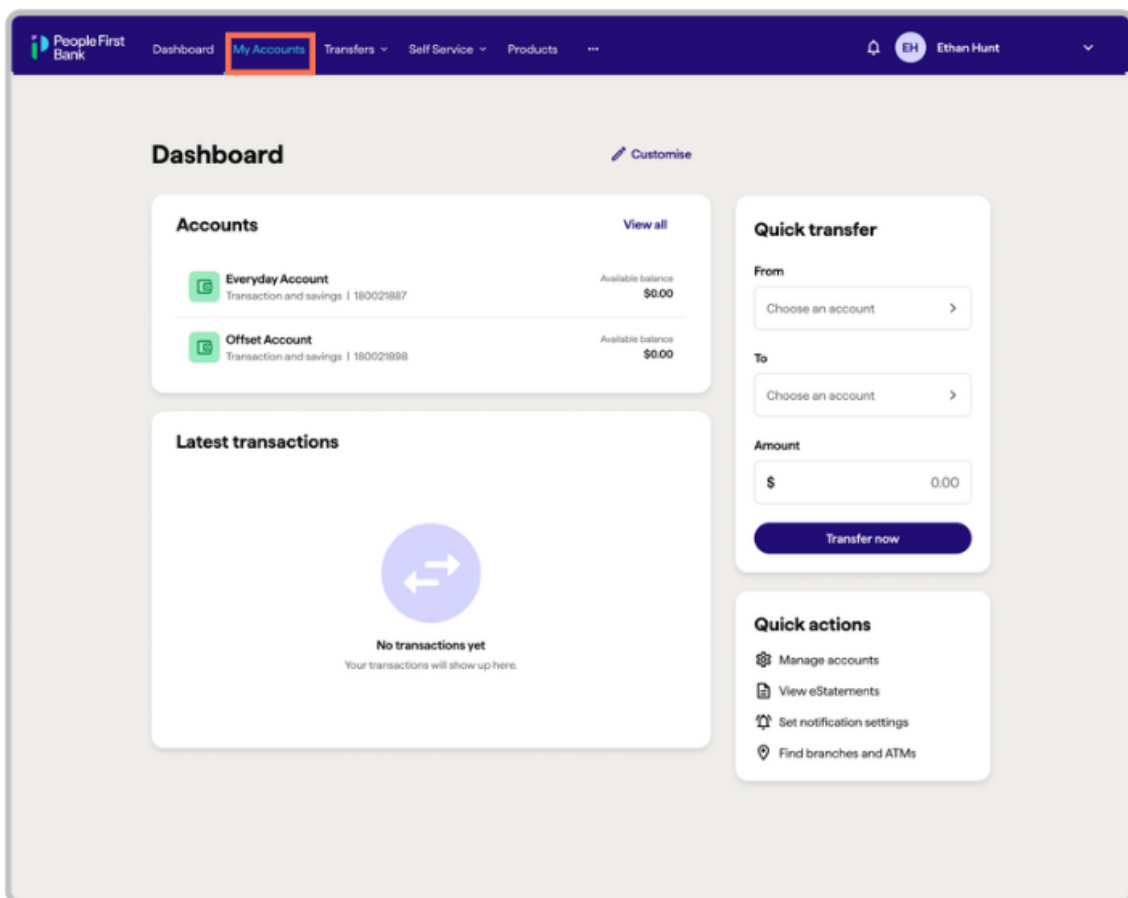
## People First Bank Online Banking

Once you've logged in to Online banking, click on 'My Accounts' from the top menu.

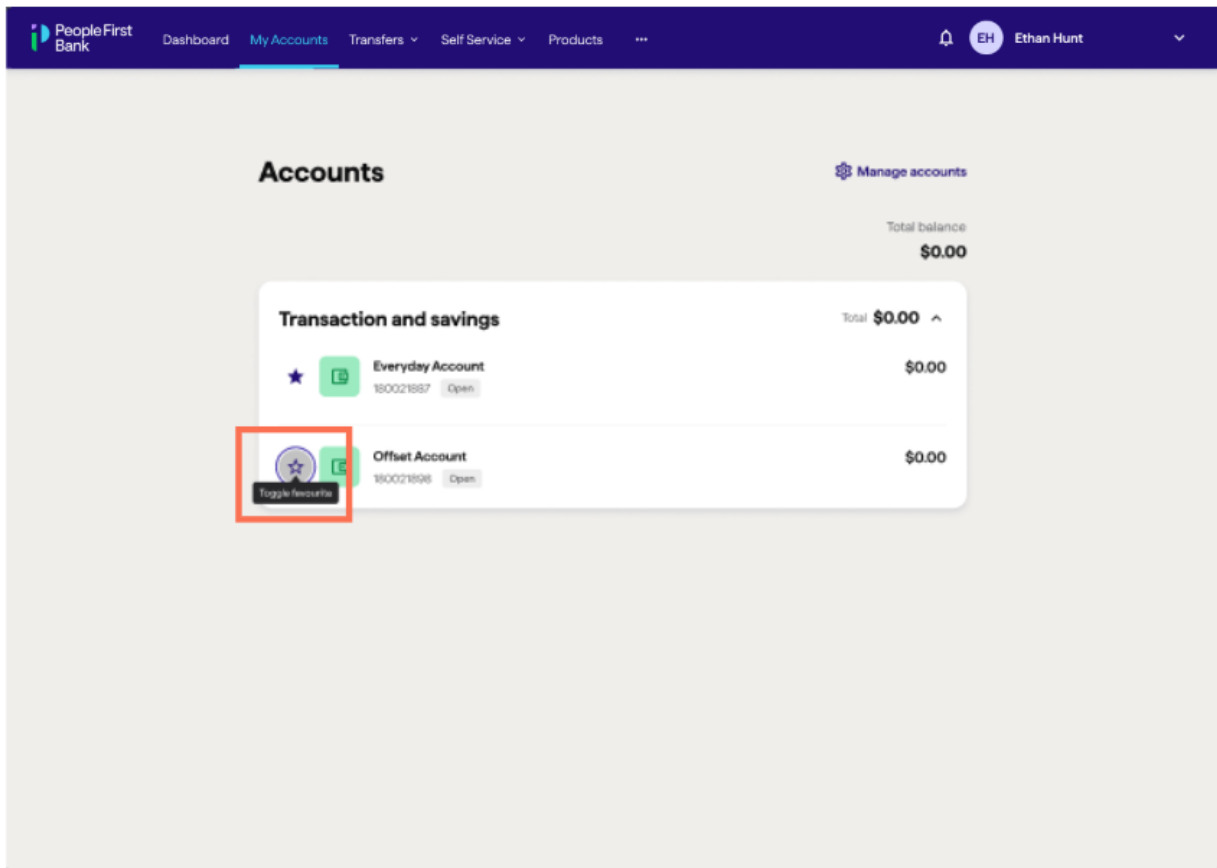
Click the star icon to add an account to your favourites.

To remove an account from your favourites, just click the star icon again.

Only your favourites will show on your dashboard, but you will still be able to see all of your accounts in the 'My Accounts' tab.



The screenshot shows the People First Bank Online Banking interface. The top navigation bar includes 'Dashboard', 'My Accounts' (highlighted with a red box), 'Transfers', 'Self Service', and 'Products'. The user's name 'Ethan Hunt' is visible in the top right. The main dashboard area is titled 'Dashboard' and features a 'Customise' link. The 'Accounts' section lists two accounts: 'Everyday Account' (Transaction and savings | 180021887) and 'Offset Account' (Transaction and savings | 180021898), both with an available balance of \$0.00. The 'Quick transfer' section includes fields for 'From', 'To', and 'Amount', with a 'Transfer now' button. The 'Quick actions' section lists: 'Manage accounts', 'View eStatements', 'Set notification settings', and 'Find branches and ATMs'. The 'Latest transactions' section displays 'No transactions yet' with a message: 'Your transactions will show up here.'



## Hide or show an account

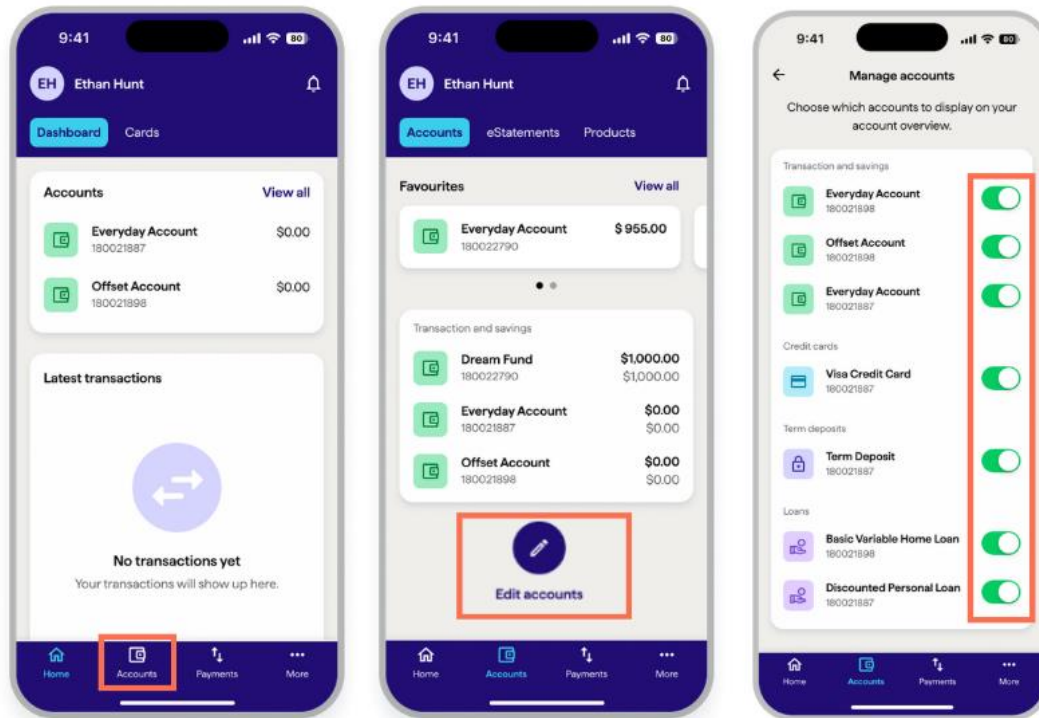
Choose to show or hide certain accounts in three easy steps.

### People First Bank App

Once you're logged in to the App, select 'Accounts' from the menu.

Select 'Edit accounts' at the bottom of your accounts list.

Toggle accounts on or off based on your preference. (The green toggle means this account will be visible and the grey toggle means this account is hidden.)



### People First Online Banking

Once you're logged in to the App, select 'My Accounts' from the menu.

Click 'Manage accounts' at the top right corner of your accounts list.

Click to toggle accounts on or off based on your preference. (The green toggle means this account will show on your dashboard. The grey toggle means this account is hidden from view on your dashboard.)



People First Bank | Dashboard | **My Accounts** | Transfers | Self Service | Products | EH | Ethan Hunt

## Dashboard

[Customise](#)

### Accounts

[View all](#)

- Everyday Account**  
Transaction and savings | 180021987 | Available balance: \$0.00
- Offset Account**  
Transaction and savings | 180021998 | Available balance: \$0.00

### Latest transactions

No transactions yet  
Your transactions will show up here.

### Quick transfer

From: Choose an account

To: Choose an account

Amount: \$ 0.00

[Transfer now](#)

### Quick actions

- Manage accounts
- View eStatements
- Set notification settings
- Find branches and ATMs

People First Bank | Dashboard | **My Accounts** | Transfers | Self Service | Products | EH | Ethan Hunt

## Accounts

[Manage accounts](#)

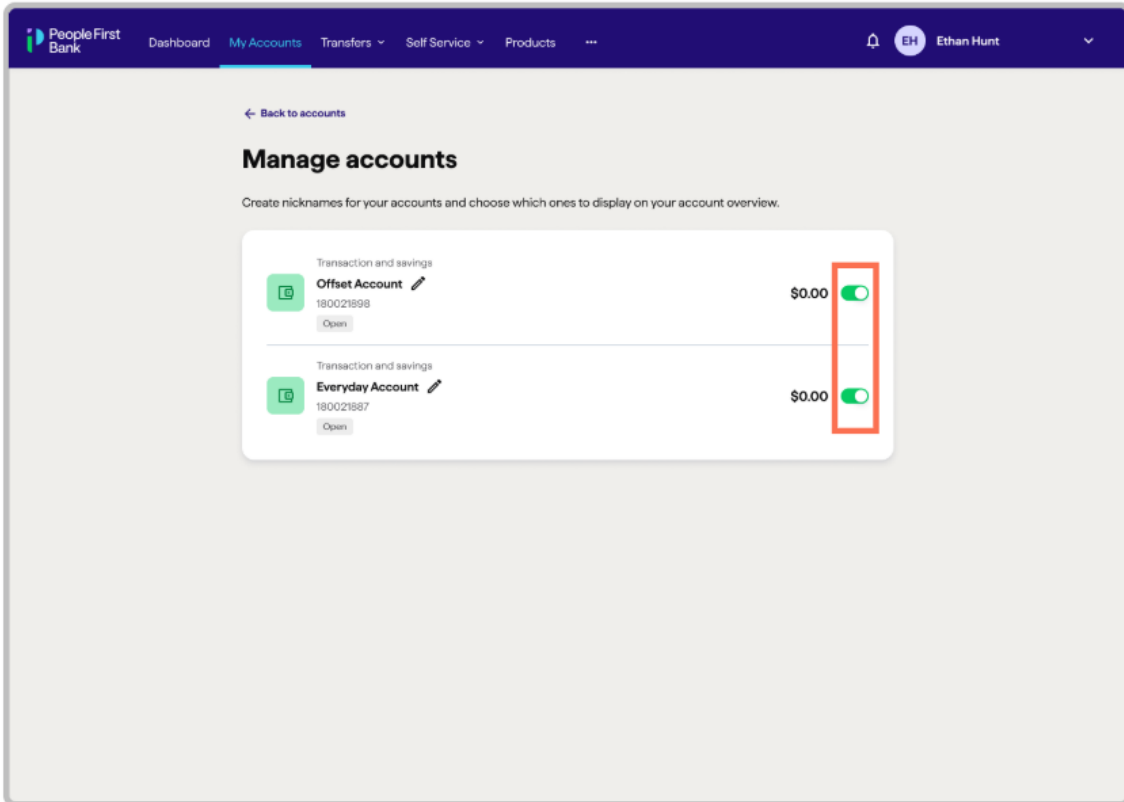
Total balance: \$0.00

### Transaction and savings

Total: \$0.00

- Everyday Account**  
180021987 | Open | \$0.00
- Offset Account**  
180021998 | Open | \$0.00

[Toggle favourite](#)



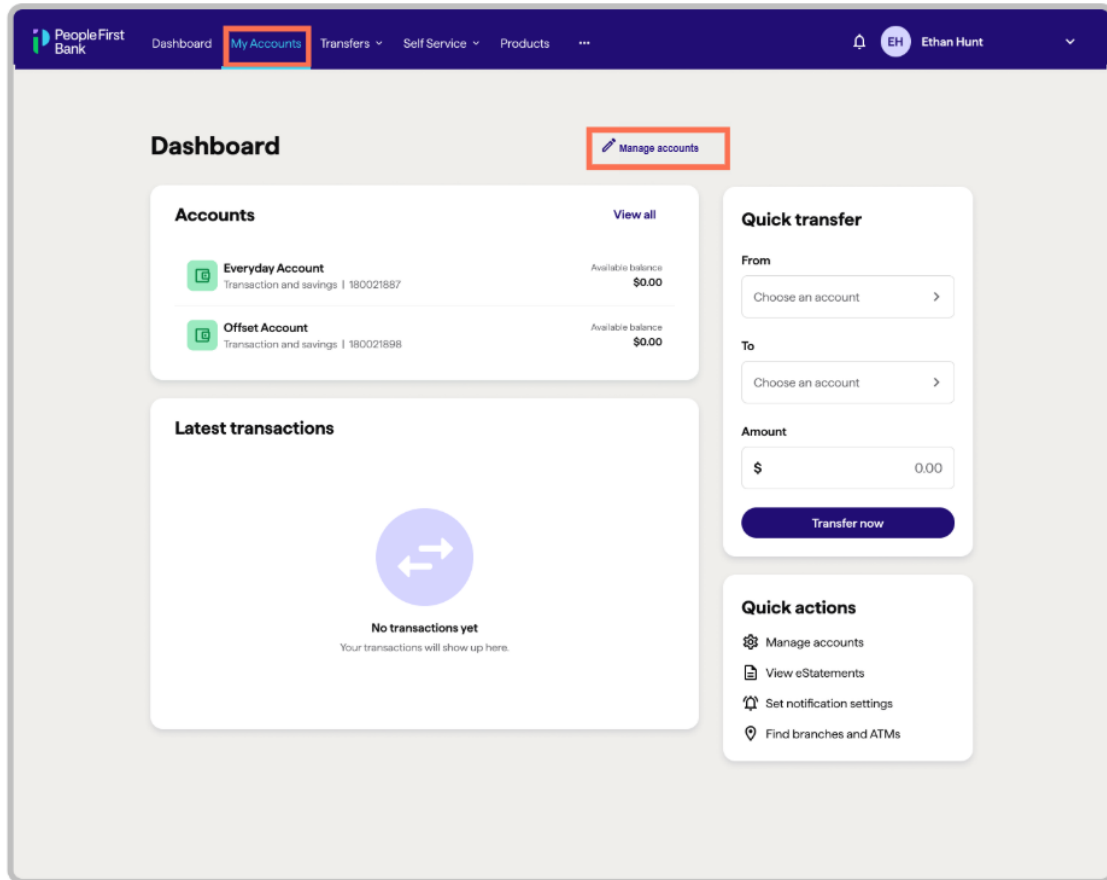
## Set a nickname for an account

### Online Banking

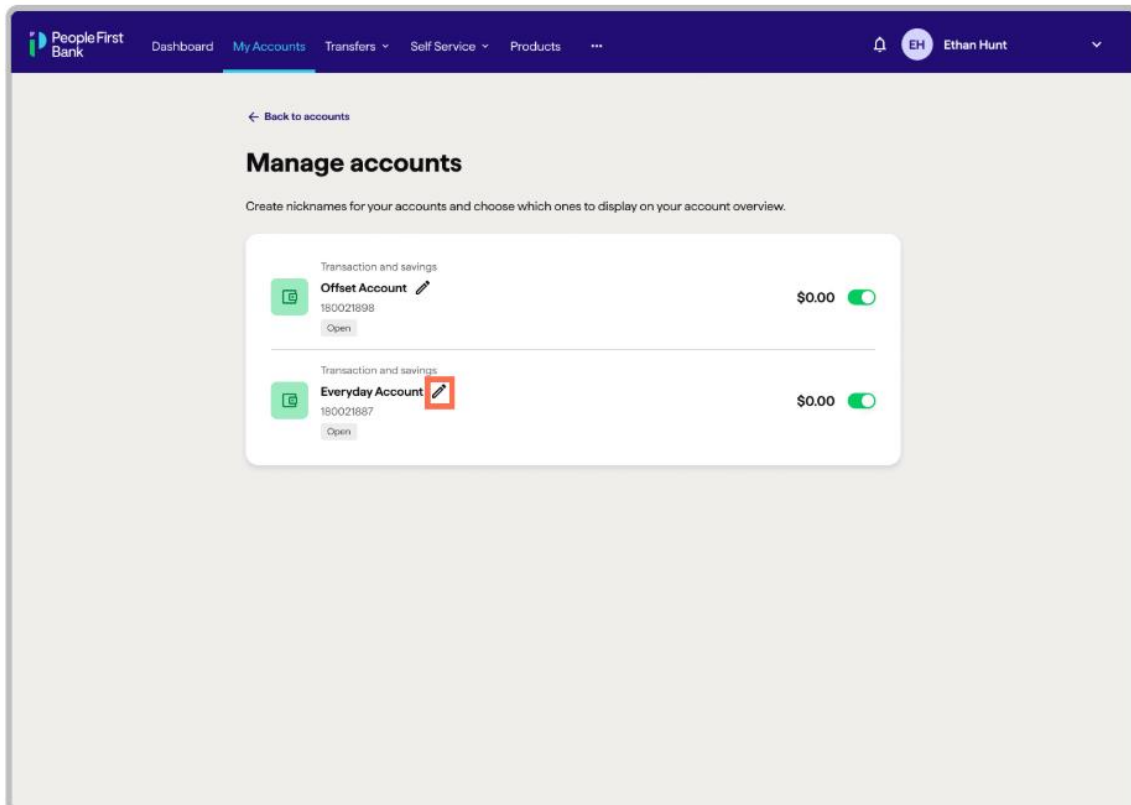
Once logged in to Online Banking, select 'My Accounts' from the top bottom menu, and then 'Manage accounts'.

Select the pencil icon next to the account you want to rename.

Select the text and press backspace to remove it, type in your desired account name, and press 'Confirm' to save the change. the green tick to save the change.



The dashboard features a dark blue header with the bank logo, navigation links (Dashboard, My Accounts, Transfers, Self Service, Products), and user information (EH, Ethan Hunt). The main content area is titled 'Dashboard' and includes a 'Manage accounts' button. Below this are three sections: 'Accounts' showing 'Everyday Account' and 'Offset Account' with their available balances; 'Latest transactions' showing 'No transactions yet'; and 'Quick transfer' with fields for 'From', 'To', and 'Amount', and a 'Transfer now' button. A 'Quick actions' list includes 'Manage accounts', 'View eStatements', 'Set notification settings', and 'Find branches and ATMs'.



The 'Manage accounts' page has a dark blue header with navigation links and user information. A 'Back to accounts' link is at the top left. The main heading is 'Manage accounts' with a sub-heading: 'Create nicknames for your accounts and choose which ones to display on your account overview.' Below this is a list of two accounts: 'Offset Account' (180021898) and 'Everyday Account' (180021887). Each account entry shows its type, account number, a balance of '\$0.00', and a toggle switch. The 'Everyday Account' entry has a red box around its edit icon.



## **Need some help? No worries.**

Don't forget to take a look at our other App and Online Banking How-To Guides on Pulse and Hive.

If you still need a bit of help with your App or Online Banking, give us a call on 13 11 82.