

How to Link Accounts to Features in Insights

By linking your accounts to features through Insights, you will be able to track and organize your activity to have a full picture of your overall financial health. You can add any of your personal accounts within Digital Banking, including linked external accounts like your credit cards, mortgage, and brokerage accounts.

01 Navigate to the Accounts dashboard in Insights

- On the main dashboard, you will have two options to access **Insights**
 - From the left navigation menu, click the **Insights** dropdown and select **Overview**
 - From your main dashboard, select the account you want to work with and click the Insights tile.
- From the Insights dashboard top menu, navigate to the Ellipsis (three dots) and select **Accounts**

02 Link Accounts to Features

- In the Accounts dashboard, click the **Edit Pen/Pencil** icon next to the account you want to work with
- Complete the required fields:
 - Name
 - Account Type
 - Preferred Balance Type
- Click **Include this account in all features** if you want to include all the features, or click the specific features that you would like this account to appear under:
 - Include in Dashboard; Expenses; Budget; Cashflow; Goals; or Net worth
- Click **Save**

03 Edit Account(s)

- If you need to update the features linked to each account, or if you open any new accounts that need to be added, simply navigate back to Insights, and repeat step 02.

