



# Barclays Virtual Accounts

## Dashboard Management User Guide



## Contents

<b>1.</b>	<b>Introduction</b>	<b>3</b>
<b>2.</b>	<b>Personalise Dashboard</b>	<b>3</b>
2.1.	Navigate	3
2.2.	Create the Dashboard	3
<b>3.</b>	<b>Revert to Default Dashboard or Delete Personalised Dashboard</b>	<b>4</b>
3.1.	Switch to Default Dashboard	4
3.2.	Delete Personalised Dashboard.	4

## 1. Introduction

This guide details how you can customise your dashboard. It also details how to switch between your role defined dashboard and your personal, customised dashboard.

There are 3 dashboards which are available depending on your role: Personalised dashboard, Maker dashboard and Approver dashboard. Users can choose from a list of widgets to customise their personal dashboard; the maker and approver dashboards are set by default.

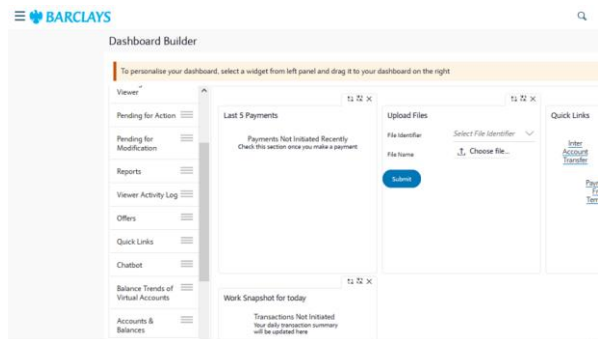
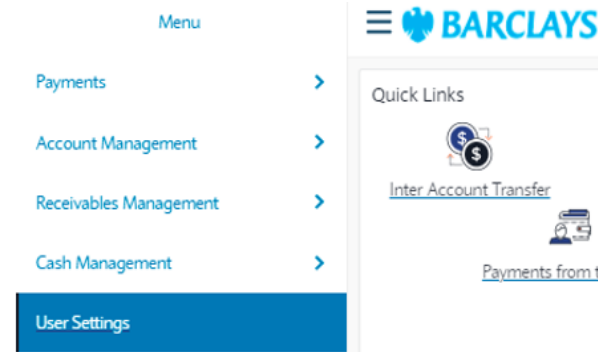
## 2. Personalise Dashboard

The following section demonstrates how to create a customised dashboard. This allows you to choose which widgets you have available on your dashboard.

**Note:** Widgets available for your selection are on the based on the roles assigned to yourself.

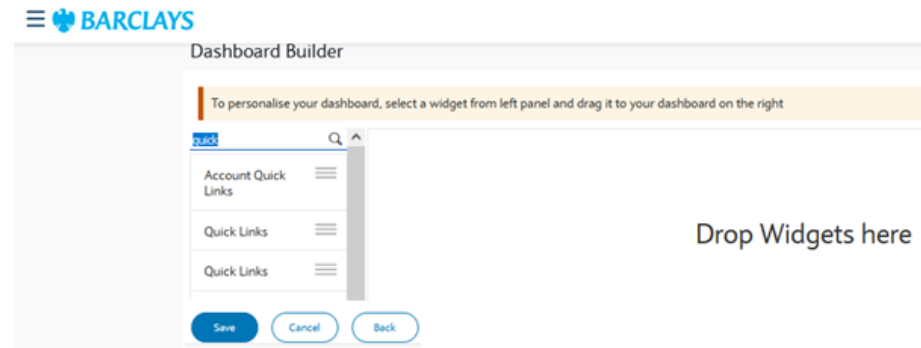
### 2.1. Navigate

1. Select the menu icon and navigate to **User Settings > Personalise Dashboard**. This loads the **Default Dashboard** screen.

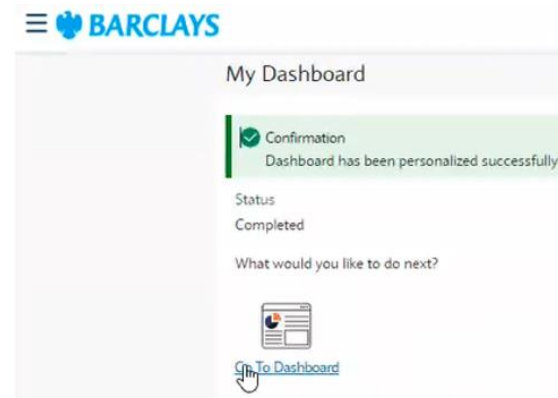


### 2.2. Create the Dashboard

1. In the upper right corner of a widget, click on the **Outward pointing arrows** icon to expand the widget. Click on the **Inward pointing arrows** icon to compress the widget or click on the Cross icon to remove the widget from the dashboard.
2. From the widget list, click and hold on the three horizontal lines to drag and drop your desired widget(s). A recommend area for the widget is highlighted.



3. Once complete, click **Save**.
4. After selecting **Save** the **Review** screen appears. Select **Confirm** to proceed. A success message will be displayed confirming your dashboard has been created.
5. You can scroll the slider up and down located inside the computer icon to check how the dashboard will display.



- Your personal dashboard will be available in the Role selection drop-down under **My Dashboard**

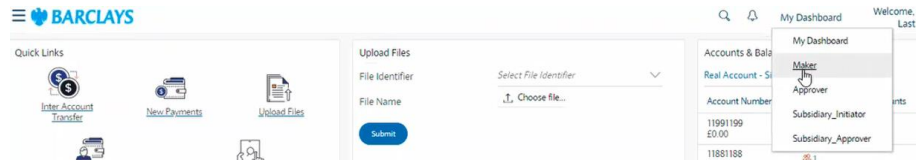


### 3. Revert to Default Dashboard or Delete Personalised Dashboard

The following section demonstrates how to revert to the default role dashboard or delete your personal dashboard.

#### 3.1. Switch to Default Dashboard

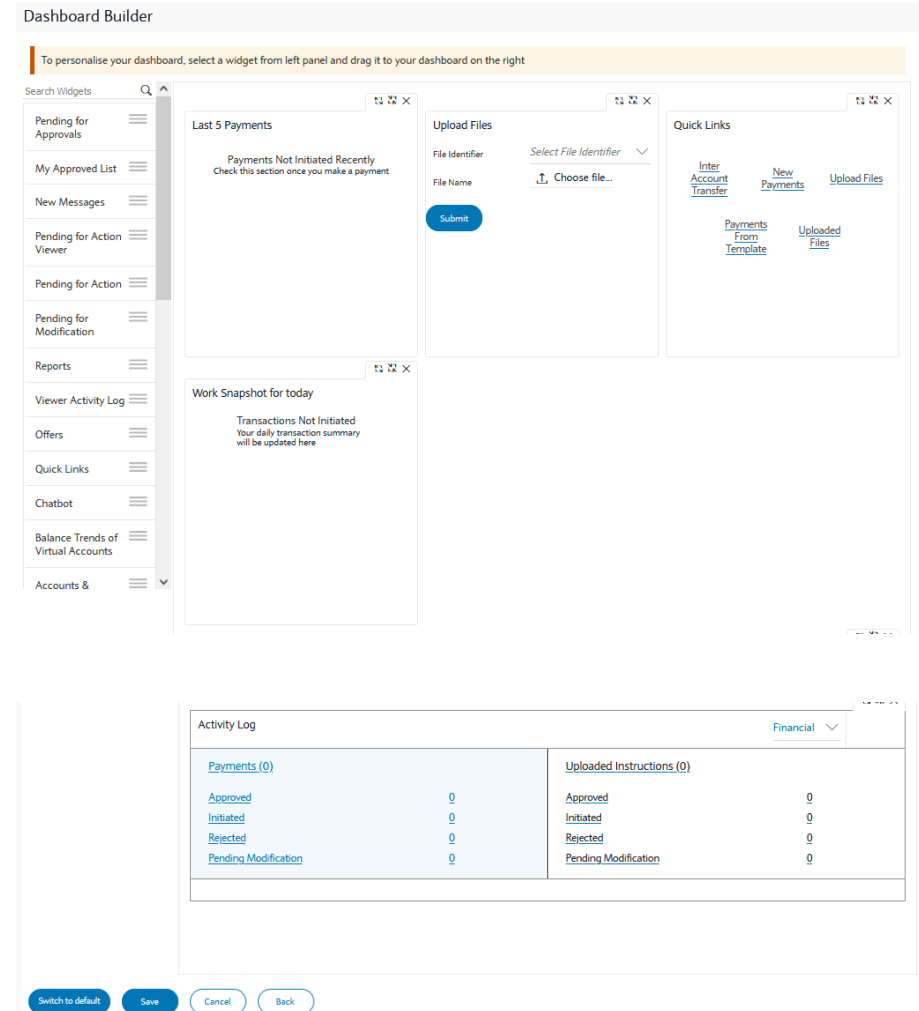
- To revert to default dashboard for your Role, select the Role name in the upper right hand side drop-down list.



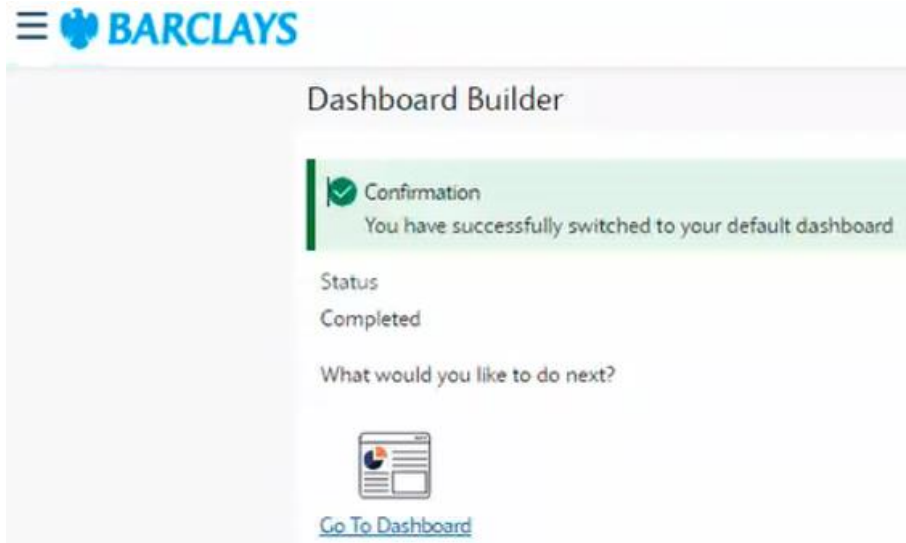
- The system displays the **Default Dashboard** for you.

#### 3.2. Delete Personalised Dashboard.

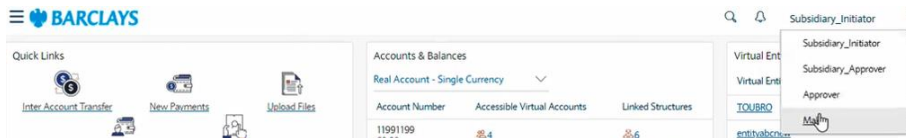
- Select the menu icon and navigate to **User Settings > Personalise Dashboard**. The **Dashboard Builder** screen will be displayed.



2. Click Switch to default to revert to the default Dashboard. The Dashboard Restore pop-up message will be displayed, prompting you to confirm the restoration of default Dashboard. Click Confirm. The success message is displayed along with the status of the operation.  
Note: This deletes your customised dashboard.



3. Only the default dashboards will now be available.



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