

## Linking External Accounts From Your Dashboard

This will enable you to view account balances and transactions of your accounts (Savings, Checking, Loans, credit cards etc.) at other financial institutions. This is view only and does not allow for money movement to and from the accounts. *For the ability to move money to and from external accounts please refer to the "Adding an External Account Within the Transfer Widget".*

### LinkExternalAccounts

1. Click on **Get Started**



2. Enter the name of the institution where you have external accounts. Click on your institution.

Link Accounts

1. SELECT 2. VERIFY 3. VIEW

Q Institution name

MOST POPULAR SITES

- Bank of America <https://www.bankofamerica.com/>
- Chase <https://www.chase.com/>
- Wells Fargo <https://www.wellsfargo.com/>

3. Enter your credentials  
(Username and password)  
Click **Submit**

Link Accounts

1. SELECT 2. VERIFY 3. VIEW

ABC Bank  
[www.ABCbank.org](http://www.ABCbank.org)

Please enter your **ABC Bank** online account credentials.

User ID  
User ID

Password  
Password [SHOW](#)

Re-enter Password  
Re-enter Password

4. Once account has been verified, click on **Close**.  
This will allow the accounts to export to the External Accounts section of your Dashboard.

Link Accounts

1. SELECT 2. VERIFY 3. VIEW

ABC Bank ✓

Cash

Regular Checking  
Checking | x-0006 \$1.96

Regular Share  
Other | x-0000 \$15.54



5. Refresh your screen and scroll to the bottom of your Dashboard and/or Account widget.  
The Linked accounts will show in the External Accounts section.

External Accounts	
<b>ABC Bank Savings</b> 05-319	\$503.61 As of 02 Apr 2021 >
<b>ABC Bank Checking</b> xxxx0000	\$15.54 As of 02 Apr 2021 >