

Digital Business Dashboard Frequently Asked Questions

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If you have registered and been using the Digital Business Dashboard before 14 September 2020, you will notice some differences.

1. What has changed?

The Digital Business Dashboard has been upgraded. The User Interface has been redesigned and the Tiles have a different look and feel as well.

2. What is new?

Along with the **redesign of the Tiles** in this update, some new Tiles for a few apps that were not available previously has been introduced. For example:

- Expensify
- GSuite
- Instagram
- Talenox

You can find out more about the Tiles available by reviewing the App Information pages.

In addition, new **Notification** feature is now available in the Digital Business Dashboard. You can now set targets/thresholds for certain metrics related to the App data that you want to be informed about.

When the target/thresholds criteria are met, a Notification is reflected in the Notification Panel – which in turn is displayed when you click the ‘bell icon’ to the top right of the business dashboard.

To learn more about Notifications, please see [section](#) below.

3. Is there any impact to my Digital Business Dashboard data?

Yes, with the redesign of the Tiles, Tiles that were previously connected to Apps that are no longer available will be removed. However, for Apps that are available, your business dashboard will continue to present Tiles with data that has been refreshed from your App.

4. Is there any impact to my App connections?

All the App that were connected to your business dashboard previously should be available except for Facebook, Shopify and Apps that are no longer available. If you are currently

connected to these two Apps – Shopify and Facebook, you will need to initiate a Reconnection with the following steps:

1. Remove the App
2. Connect the same App again.

See below for apps that are no longer available.

5. What are the Apps that are no longer available?

With this update, we regret that the following Apps will no longer be available on the Digital Business Dashboard:

- Capsule
- Deputy
- Office365
- Freeagent
- Paypal
- Sage
- Tradegecko
- Twitter
- Wave
- When I Work
- Wrike
- Zendesk

However, please be assured that we are constantly reviewing the list to ensure that the most popular Apps are featured on the Digital Business Dashboard.

GENERAL

6. What is the Digital Business Dashboard?

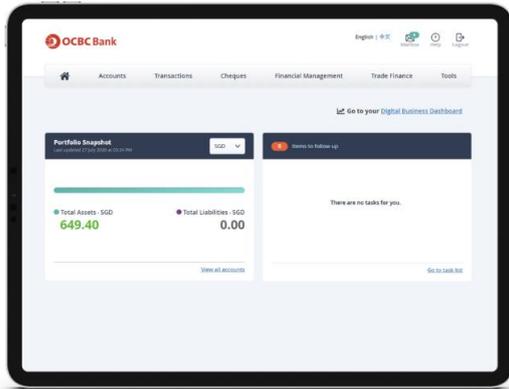
This is a smart dashboard for businesses, powered by 9 Spokes. The dashboard draws data from the online business applications that you already use and displays these metrics all in one place.

If you are not already using online business applications to help run your business, there is also an application store (“Connect”) containing applications that may be relevant for your business.

9 Spokes is a New Zealand based company listed on the Australian Stock Exchange.

7. How do I access the Digital Business Dashboard?

You can access the Digital Business Dashboard from Velocity@ocbc. Simply click on the icon on the top right hand.



8. Do I have to pay for the Digital Business Dashboard?

No, signing up for the business dashboard and connecting your apps is completely free of charge. We do not ask you for any credit card details and there are no hidden costs.

The Connect page contains apps that you may have to pay for, but this relationship is managed between you and the App company.

MY ACCOUNT

9. Why did I receive an account subscription notification when I did not subscribe to this service?

Another Velocity@ocbc Authoriser in your company may have subscribed the accounts for the service. If you would like to set up your own dashboard, please login to [Velocity@ocbc](#) and set up your own dashboard as well.

10. Can each user customise their own dashboard?

Yes, the dashboard is completely customisable at an individual user level. Each user can add and remove specific Tiles and tailor their dashboard to suit them.

11. Why am I having trouble logging into my Digital Business Dashboard?

If you are having an issue logging into your dashboard you can try the following:

- Check your Velocity@ocbc Login credentials are active [here](#)

If you are still having issues logging in with your Velocity@ocbc credentials, please contact us at +65 6922 3199.

12. Why is the dashboard unavailable?

There might be scheduled maintenance, please give us some time and try again later.

COMPANY AND USERS

13. Why can't my Velocity@ocbc user under Basic Service Package log into the dashboard?

This service is provided to Velocity@ocbc users under Standard and Classic Service Packages.

14. I have a Premium Velocity@ocbc account, why can't I log in?

This service is only provided to Velocity@ocbc users under the Standard and Classic package.

15. How do I change the company name I signed up with?

You can easily change the company name you signed up with by completing a few simple steps below:

1. At the top right corner of your Dashboard click on the person icon to open up a menu.
2. Click on Settings and select Company Profile
3. This will open up your company Info page to make changes to your company name
4. Click Save

Do note that this does not update your bank account details with OCBC bank.

16. If my account with OCBC is closed, can I still log in via the digital business dashboard? What will happen to the other apps that I have purchased online?

As the dashboard is a service for OCBC customers, once your account is closed, you will no longer be able to use the service. The subscriptions for the other apps you may have connected or purchases through Connect will still be active and you may login to it directly to continue using it.

TECHNICAL**17. Do I need to download any applications or software?**

No, you don't. The dashboard is a web-based application which runs inside your internet browser, so there's no need to download anything.

This means you can use the dashboard on any device, anytime as long as you have an internet connection.

18. Do I need Java installed?

No, Java doesn't need to be installed prior to using the dashboard. We've made accessing the dashboard easy - all you need is an internet connection.

19. Do I need Flash installed?

No, Flash doesn't need to be installed prior to using the dashboard. We've made accessing the dashboard easy - all you need is an internet connection.

20. Which browsers are compatible?

The business dashboard supports the latest versions of the following browsers:

- Google Chrome
- Safari
- Mozilla Firefox
- Internet Explorer Edge

You can update your browser by visiting their website.

21. Do I need cookies enabled?



Yes, the dashboard does require cookies so that it can remember features like the layout of your dashboard and your sign-on credentials (otherwise you'd have to log in every time you changed page!)

To enable cookies, simply visit your internet browser's settings.

22. What internet speed do I need?

We recommend an internet connection with a minimum upload and download speed of 1 mbps. You can check your internet speed by going to Speed Test.

23. How is my data stored?

On how your data is used by 9Spokes, please refer to 9Spokes's [Privacy Policy](#) and also the relevant terms and conditions you have agreed to during your sign up process. This can be found on the footer of your Digital Business Dashboard.

APPS

24. What is an App?

The terms App is used a lot and can be confusing.

The App we refer to are online business tools and software. They can be used to support a range of online business functions such as accounting, marketing, point of sale, inventory and so on.

25. How do I sign up for a free trial of an App?

You can sign up to a specific App trial by completing the following steps:

1. Login and go to the Connect tab
2. This will open up a page showing the Apps available to connect to.
3. Click the App you wish to trial
4. This will open up the App's info page with the option to click on "Find Out More"
5. Clicking on "Find Out More" will take you to the apps website to complete a sign-up

26. How do I cancel my subscription with an App?

Unfortunately, we cannot cancel your subscription with any of the apps you use, this is managed directly with the App provider.

27. Why do you show pricing on the App info pages?

The dashboard shows App pricing information to help you with your decision making if you are looking at using new apps for your business.

We do not manage any billing that is done directly between yourselves and the App provider you choose to subscribe to.

28. Do I have to pay to connect an App?

No, connecting an App to your dashboard is completely free of charge. The apps all have their own pricing plans and you will continue to pay for the App subscription with the App provider directly.

You can find out how much each individual App costs via the 'Connect tab' and by selecting a particular App.

29. I have accidentally purchased the wrong apps or I would like to terminate the apps that I have purchased via the digital business dashboard. How do I get a refund or can OCBC assist me in the refunds?

As the billing is not managed by us and is done directly between yourselves and the App provider you have chosen to subscribe to, we will not be able to facilitate in any refund process and you will have to reach out directly with the App provider.

30. Why am I seeing a 'Reconnect' button on my Tiles?

Sometimes, an App may need to be reconnected to your dashboard if something has changed behind the scenes. If this is the case, you will see a button that says 'Reconnect' on a Tile being powered by that App and it needs to be reconnected.

It is easy to reconnect your App, just click on the "Reconnect" button on any of the Tile which displays this and follow the instructions

1. Clicking on the "Reconnect" will bring up the App info page with a message "Application has lost connection" Click on Reconnect to begin your connection journey once again
2. Re-enter the login details for the App
3. Your App connection should then be re-established

The App should now be reconnected. To check, go to the dashboard and the 'Reconnect' button on the Tiles should be no longer be there.

31. Why am I having trouble connecting an App?

If you have trouble connecting one of the listed App to your dashboard, please try the following:

1. Clear your browser cache and cookies
2. Double check you are using the right login details for the App you are trying to connect. (Check this by attempting to login to the App directly using the same login details)

If the issues persist, please contact us at +65 6922 3199 and we will be able to assist you to log a request for technical support.

32. How do I connect an App?

Connecting an App you already use to your dashboard is easy. Just follow these simple steps:

1. Login and select the 'Connect' tab from the top of your dashboard
2. This will open up a page showing available Apps
3. Select the App you wish to connect
4. Click on the 'Connect' button to begin
5. Confirm you wish to connect the App to your dashboard and click on Yes
6. You will be asked to enter the login details for the App you wish to connect to
7. Finally, you'll be given a list of Tiles that are powered by the App you have just connected. You have the option of removing the Tiles you don't want displayed on your dashboard. When you are happy with your selection, click on Next to complete your journey.

Your App should now be connected and you'll automatically be navigated back to your dashboard with all the relevant Tiles on display.

33. How do I disconnect an App?

If you no longer want your App connected to your dashboard, you can disconnect it easily. Just follow these simple steps:

1. Login and go to 'Connect' in the top navigation
2. This will bring up the Apps page and you will see a green tick on the Apps you have connected to
3. Select the App you wish to remove to bring up the App Info page.
4. Then select 'Remove'
5. Confirm that you would like to remove this App from your dashboard.

Once that is done, the App will now be disconnected from your dashboard and all Tiles powered by the App will be removed from your dashboard.

Tiles

34. What is a Tile?

A Tile is just the name we give to the insights on your dashboard — such as how much cash you have owing, the value of your inventory or your weekly sales.

Tiles will display key patterns and trends on your business dashboard using the data from your connected apps.

35. Can you help me to understand a Tile?

You can find out what each Tile means by going to the “Connect” tab and click on any App which will display Available Tiles at the bottom of the page.

36. How can I tell what App powers which Tile?

To find out which App powers a specific Tile, follow the below steps:

1. From your dashboard Click on the Connect tab where you would be given a list of Apps to select from
2. Click on an App to open up its info page. Scroll down to see a list of Tiles powered by this App.
3. You can also click on the “More Info” for each Tile and it will tell you which App will power this particular Tile.

37. How do I add a Tile to my dashboard?

1. Upon connection of each successful App, there would be a list of tiles for you to select, follow the below steps: Login and go to your dashboard
2. Start an App connection journey in the Connect tab
3. Once you have successfully completed the journey you will be given the option of selecting the list of Tiles you do not want on your Dashboard.
4. If you are happy to have all of the listed Tiles to be connected, click on Next to complete the journey.

To add a Tile that was removed from your dashboard (when the App is still connected), simply navigate to the App Info Page again and Scroll down to see and find the specific Tile and click on 'Connect Tile'.

38. Why is my Tile showing incorrect data?

We are sorry to hear this is happening. Firstly, here are a few things you can try to solve the issue.

1. Clear your browser cache and cookies
2. Try removing the Tile by going to the “Connect” tab and find the App that is powering the Tile. Click on the App and scroll down until you see a list of Tiles that are being powered. Scroll left or right to find the Tile you are looking for and then click on “More Info”.
3. This Tile info page will help you understand a bit more about the Tile.

39. Why are my OCBC Bank Tiles showing incorrect data?

We are sorry to hear this is happening. Firstly, here are a few things you can try to solve the issue.

1. Clear your cache and cookies
2. Try removing the Tile by going to the “Connect” tab and find the App that is powering these Tiles. Click on the App and scroll down until you see a list of Tiles that are being powered. Scroll left or right to find the Tile you are looking for and then click on “More Info”

If this still doesn't work, contact us at +65 6922 3199, from Mondays to Fridays (excluding Public Holidays) from 8.30am to 6pm.

40. How do I add new accounts to be viewed in the Tiles?

If you are Velocity@ocbc authoriser of the account, you can add new accounts by completing a few simple steps below:

1. Select the 'Connect' tab in the navigation at the top of the page.
2. Click OCBC Bank App from the list of connected Apps indicated by the green tick
3. Click the 'Remove' button and follow the steps on screen until you get the option to click 'Connect' again
4. Follow the steps provided on screen to login with your Velocity@ocbc credentials and subscribe for more accounts

41. How do I remove accounts to be viewed in the Tiles?

If you are Velocity@ocbc authoriser of the account, you can remove accounts by completing a few simple steps within Velocity@ocbc:

1. Login to [Velocity@ocbc](#)
2. Click on 'Tools'
3. Select the 'Apps linked to Velocity@ocbc'
4. On the list of Apps, select the corresponding accounts you would like remove from the apps and click 'Unlink Accounts'
5. Click 'Yes' on the popup message to continue

42. How do I personalise my smart dashboard?

You can move the Tiles around in any order you like. Simply click and hold the mouse button anywhere on the Tile and then drag it into a new position. You can do this as often as you like.

43. Why is there a 'No Data Found' on my Tile?

This is usually caused by the App not having the correct data in order for the Tile to read from. You can refresh the data by reconnecting the App again. Once the App has been reconnected, it should perform a quick refresh on your browser to populate the Tile.

If this still doesn't work, contact us at +65 6922 3199, from Mondays to Fridays (excluding Public Holidays) from 8.30am to 6pm

44. Why is there a 'No Data Present' on my Tile?

When this happens, you will have to remove the App and re-connect it again. Sometimes, data fail to get pulled through to be displayed on your Dashboard and a simple re-connection by removing the App and connecting it again should fix the problem. A quick refresh of the page may also be necessary.

Notifications

45. Which App supports Notification in the Digital Business Dashboard?

The following Apps support the Notification feature:

- Expensify
- Facebook
- Instagram
- Intuit Quickbooks
- Xero
- LinkedIn
- MailChimp
- Unleashed
- Vend
- Shopify

You can view the list of Apps that support the Notification feature in the Digital Business Dashboard as follows:

1. Navigate to the Settings menu
2. Click on Notification Settings on the left-hand panel
3. Turn on Notification Master Setting at the top using the toggle to its right
4. The Advanced Settings section will appear with the list of Apps that support Notification

Note: you can only see Apps that is supported by Notification here if you have connected the App to the Digital Business Dashboard

46. How can I see my Notification Settings?

There are three (3) ways to see the Notification Settings

1. Navigate to the Settings menu and select Notification Settings
2. From the Notification Panel (click bell icon to the top right of dashboard) then the click on the cog-wheel icon
3. From a Tile menu (3 dots on a Tile) you can select Notification Settings – only available for Tiles that supports this feature.

47. How do I turn on or off Notifications for an App?

You can turn on or off a Notification by following these steps.

1. Navigate to Notifications settings
2. Check that the Notification Master Settings to the right is toggled on
3. The Advanced Settings section, find the Setting that corresponds to your App
4. You can then turn on Notification for Apps that support Notification using the toggle to the right of it
5. Similarly, you can also turn off a Notification the Apps using the same toggle

Note: once you have turned off the Notifications for an App, all Tile Notifications for the same App is turned off.

48. How do I turn on Notifications for a Tile?

See how to turn on Notifications for an App.

You can then select to turn on or off Notifications for the available Tiles using the associated toggle.

49. How do I view my Notifications?

You can view your Notifications on the Notifications Panel by clicking on bell icon.

Note: on your mobile device, you can view your Notifications by clicking the Notification tab.

50. How are my notifications ordered in the notifications tray?

Notifications are ordered by time the time they are triggered in sections for today, last 3 days and older, from newest to oldest order.

51. How can I delete a Notification?

You can delete a Notifications in the Notifications Panel by clicking on the cross 'x' symbol.

Note: on your mobile device, you swipe the Notification to the right to delete it

52. How do I turn on or off Notifications for a particular metric within a Tile?

You can do so by following these steps:

1. Navigate to the Notifications Master Settings
2. Find the corresponding App and select the desired Tile.
3. Click on the metric and enter the threshold
4. Untick the metric you don't want to get notifications for

53. How can I clear all my notifications?

You may clear groups of Notifications in the Notifications Panel by using the cross next to that section.

Notifications are broken up by time received - today, last 3 days and older, next to each section title, you will see a cross. Pressing the cross deletes all notifications in that section.

54. Why do some metrics within a Tile have periods and others don't?

Some Tiles are periodic Tiles and base data within certain periods - for example, a revenue over a day, month and year, while other Tiles are non-period based like engagement for a campaign.

Tiles with periods will allow you to set threshold for each period with the notification settings for a Tile - period based tiles and metrics will trigger notifications once you have met your target over a specific period from when you set it.



Tiles without periods will allow you to set the threshold as an absolute value irrespective of any periods.

Non-period based tiles and metrics will trigger notifications once that metric reaches the set value.

55. How do I use period notifications? Daily, Weekly, Monthly

Use period based notifications by simply setting the threshold/target for a metric over a specific time frame (daily, weekly, monthly - as available for the Tile) in the notification settings for each Tile.

You can access these settings by going to Notification Master Settings and clicking into a Tile once an apps notifications has been turned on.

56. How do I use notifications on mobile?

You can setup Notifications in the same way as you do on a desktop - use Settings menu or the Notifications Panel to navigate to the Master Settings page.

As you do on your desktop, you can toggle Apps and Tiles Notifications with relevant metrics and set threshold for it.