Customize your Account Grouping on the Dashboard

A Few Notes:

- Ungrouped Accounts: You can leave some accounts unassigned to a custom group. In the group view, unassigned accounts display in the Ungrouped Accounts section.
- Empty Groups: Custom groups must contain at least one account. The system deletes a group if all accounts are removed. When an end user deletes a group, the system moves its accounts to the Ungrouped Accounts section.
- Long Account and Group Lists: When a list contains many accounts or groups, the system displays a limited number at one time. You can click Show More or Show Less to display additional accounts or groups.

Create a Group

Create a group to organize related accounts based on business needs. Groups let you view and manage accounts together, monitor balances, and track activity.

To create a group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Click + New Group. The Create New Group window opens
6. Enter a group name in the Group Name field
7. Click Create Group. The Select Accounts for <group name> window opens
8. Select the checkboxes for the accounts to add
9. Click Add Accounts

Add Accounts to a Group

You can add accounts to a group from other groups or the Unassigned Accounts section.

To add accounts to a group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Click More > Add Accounts for the group where you want to add accounts. The Add Accounts to <group name> window opens
6. Select one or more account checkboxes
7. Click Add Accounts. The system displays a confirmation message after it adds the accounts

Reorder Groups

You can reorder custom groups on the Dashboard when two or more groups exist.

To reorder groups:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Drag a group to a new position

Reorder Accounts in a Group

Arrange your accounts in a group so your most important or frequently used accounts display where you expect them on the Dashboard, making it easier to review balances and manage your finances at a glance.

To reorder accounts in a group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Drag an account to a new position

Move an Account to Another Group

Reassign accounts to different groups to better reflect how you manage your finances, such as separating personal and business accounts or grouping accounts by purpose.

To move an account to another group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Select an account checkbox and click More > Move Account to Another Group. The Move to Group window opens
6. Select the destination group
7. Click Move

Note: If moving the account leaves the original group empty, the system prompts you to confirm deletion of the empty group. The system displays a confirmation message after it moves the account.

Move All Accounts to Another Group

Move all accounts to another group to consolidate accounts and remove unnecessary groups.

To move all accounts to another group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Click More > Move Accounts to Another Group for the group from which you want to move all accounts. The Move Accounts to Group window opens
6. Select the destination group
7. Click Move
8. Click Yes, Delete when prompted to confirm deletion of the original group. The system moves all accounts to the selected group, deletes the original group, and displays a confirmation message

Delete a Group

Delete a group you no longer need to keep your account list organized. Any accounts in the group move to the Ungrouped Accounts section so you can assign them to a different group later.

To delete a group:

1. Go to Tools > Settings in online banking
2. Click the Accounts tab
3. Click Organize Accounts
4. Click the Groups tab
5. Click More > Delete Group for the group you want to delete
6. Click Delete when the confirmation message displays

Note: When you delete a group, the system moves its accounts to the Ungrouped Accounts section.

Switch to Group View

When at least one custom group exists, you can switch between account type view and group view on the Dashboard. Before you begin, at least one custom group must exist.

To switch to group view:

1. Go to the Dashboard in online banking
2. Click More > View by Custom Group next to the Search Accounts field

Account Tagging

Define a custom label to categorize accounts based on needs. Use tags to group accounts by purpose, project, client, or other relevant categories.

To create a tag:

1. Go to the Dashboard in online banking
2. Click More > Account Tags for the account you want to add tags to. The account window opens
3. Type the name of a tag in the Search or Type To Create a New Tag field
4. Click Create New Tag. The Create New Tag window opens
5. Verify the tag name and click Create. A message confirms that the system added the tag

Add Tags to an Account

Label accounts with custom tags to organize them. Tags make it easier to search, filter, and manage large account lists based on specific needs. Tags are associated with your profile and are not shared across users.

To add tags to an account:

1. Go to the Dashboard in online banking
2. Click More > Account Tags for the account you want to tag. The account window opens
3. Optional: In the Search or Type To Create a New Tag field, type the name of a tag to find an existing tag
4. Click + for the tags you want to add
5. Click Save. A message confirms that the system saved the tags

Remove Tags from an Account

Remove tags from an account to update or simplify its categorization. This helps keep the tagging system relevant as account roles change. Tags are associated with your profile and are not shared across users.

To remove tags from an account:

1. Go to the Dashboard in online banking
2. Click More > Account Tags for the account you want to tag. The account window opens
3. Click X next to the tags you want to remove
4. Click Save. A message confirms that the system saved the changes to the tags

Manage Tags

View, edit, or delete existing tags to keep account organization up to date. Use tag management to maintain consistent labeling across accounts and support efficient searching and filtering.

To manage tags:

1. Go to the Dashboard in online banking
2. Go to More > Manage Tags in the Accounts section. The My Tags window opens
3. Click More for the tag that you want to rename or delete, then select one of the following options:
    - Rename: In the Rename Tag window, enter a new name, then click Rename
    - Delete: Click Yes, Delete to confirm that you want to remove the tag from all accounts
4. Click Done

Account Search and Filtering

Use the search bar to quickly find accounts by name, type, nickname, or the masked account number.

To search for an account:

1. Go to the Dashboard in online banking
2. Click in the search bar
3. Begin typing the account name, nickname, type, or number. For example:
    - Type business to display accounts with business in the account type name
    - Type loan to find all loan accounts
    - Enter the last four digits of an account number to locate a specific account
    - Type checking to filter to checking accounts
4. Click Filter to apply additional filters to the account list, such as minimum or maximum balance, tags, or account types
5. To view an account, click its name