

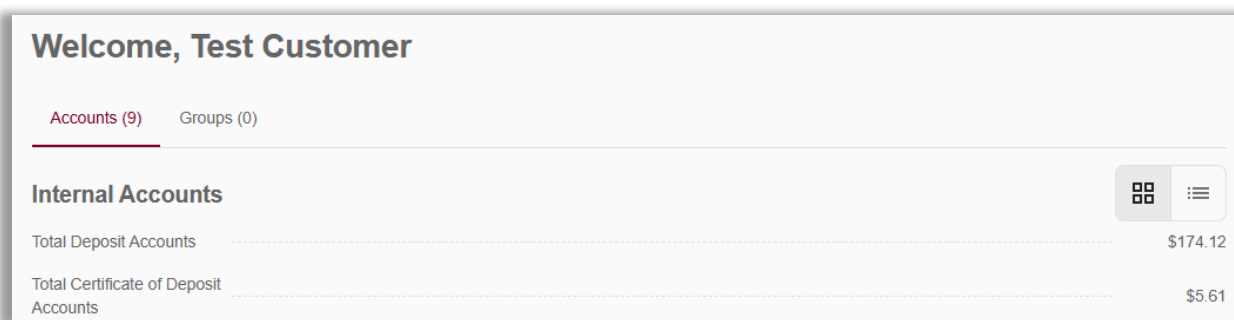
Account Groups

Overview

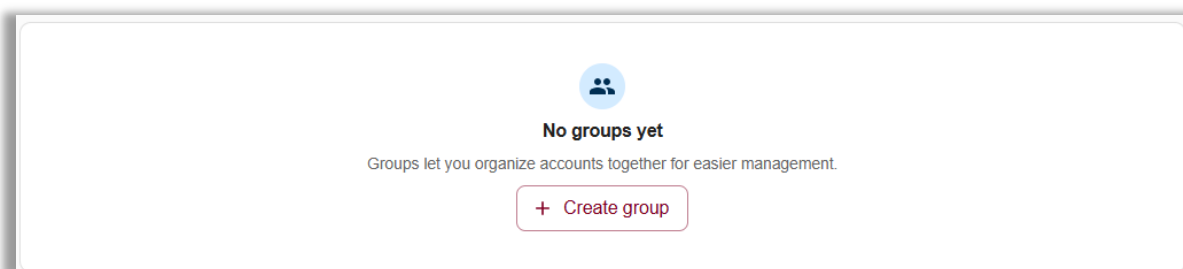
Account Groups allows you to group together selected accounts for a personalized and improved efficiency in reviewing your accounts.

Creating a Group

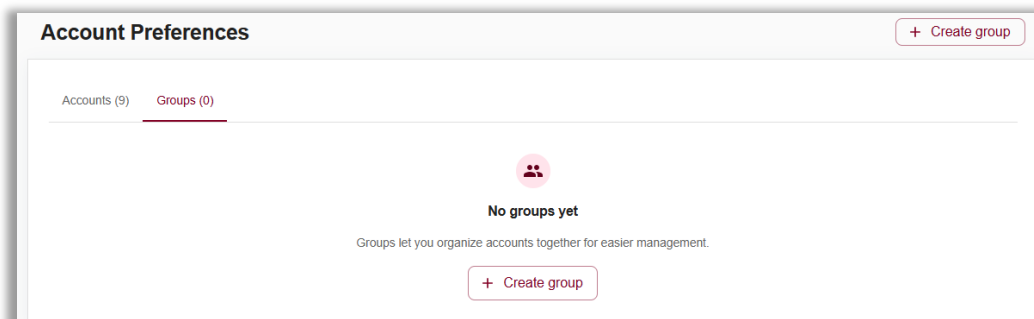
1. On your Accounts screen, you will now display two tabs at the top of your internal accounts – Accounts and Groups. The number next to these correlates to the number of accounts or groups you have. Select the **Groups** tab.



2. Click the “+ Create group” button.



3. This brings you to the Account Preferences screen. Select the “Groups” tab, then the “+ Create group” button.



4. Enter the Group name, then select the accounts you would like to be part of the group. Click **Next**.

Create Group ✕

Group details

Group name *
e.g. Main Payroll

☐ Set as default

Search accounts

0 Accounts selected [Select all](#)

1 Year CD *****1998	☐
Flex Checking *****1401	☐
Flex Checking *****1956	☐
Money Market *****3055	☐
Statement Savings *****1948	☐

1-5 of 5 < >

5. Set the accounts in your preferred order. You can either drag and drop the accounts using the  icon on the left, or by selecting the three vertical dots on the right and selecting the appropriate option to move the account up or down. Click **Review group**.

Create Group ✕

Account order

Search accounts

≡ Money Market *****3055	⋮
≡ Statement Savings *****1948	Move to top Move up Move down Move to bottom

6. Review your group set up. Once confirmed, click **“Create Group”**.
7. You will now be able to see these groups on your Accounts and Account Preferences screens.

If you add additional groups, you will be asked if you would like to set the group as the default. This is an optional feature. Any group selected as the default will display first on the Groups screen. If you do not select a default group, the first group you set up will be the one to display first.

Editing a Group

1. To edit a group, select the **“Customize Home Screen”** button on the Accounts screen. Then select **“Account Preferences”**.
2. On the Account Preferences screen, select the **“Groups”** tab. Select the desired group from the dropdown, then click **“Edit”**.

The screenshot shows the 'Account Preferences' interface. At the top right is a '+ Create group' button. Below the title, there are two tabs: 'Accounts (5)' and 'Groups (2)'. The 'Groups (2)' tab is active. A dropdown menu is open, showing 'Savings Accounts' as the selected group. To the right of the dropdown is an 'Edit' button. Below the dropdown, a list of groups is displayed: 'Checking Accounts', 'Savings Accounts', 'Money Market 3055 Internal', and 'Statement Savings 1948 Internal'. At the bottom right, there is a pagination indicator '1 - 2 of 2' with navigation arrows.

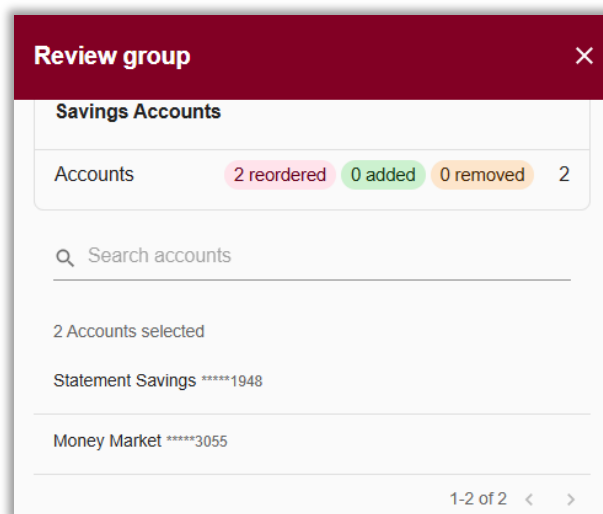
3. Edit the name, default designation, or selected accounts. Then click **“Next”**.
(Screenshot next page.)

The screenshot shows the 'Edit group' dialog box with a dark red header. Below the header, the 'Group details' section contains a text input for 'Group name*' with the value 'Savings Accounts'. A toggle switch for 'Set as default' is currently off. Below this is a search bar labeled 'Search accounts'. A list of accounts follows, with '2 Accounts selected' and a 'Select all' link. The accounts are: '1 Year CD *****1998', 'Flex Checking *****1401', 'Flex Checking *****1956', 'Money Market *****3055' (checked), and 'Statement Savings *****1948' (checked). The last two accounts are highlighted in pink. At the bottom, it says '1-5 of 5' with navigation arrows.

4. Review the group and make any sort order adjustments. Click **“Review Group”**.

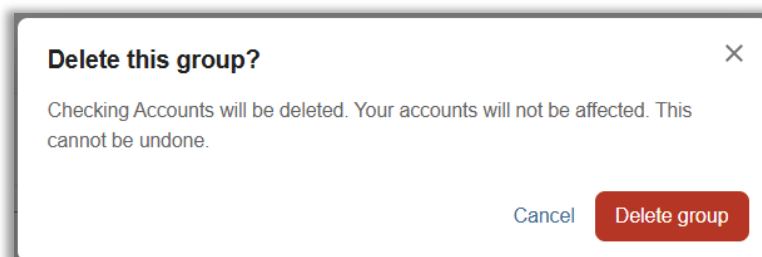
The screenshot shows the 'Edit group' dialog box with a dark red header. Below the header, the 'Account order' section contains a search bar labeled 'Search accounts'. Below the search bar, two accounts are listed: 'Money Market *****3055' and 'Statement Savings *****1948'. Each account has a drag handle (three horizontal lines) on the left and a vertical ellipsis menu on the right. At the bottom, it says '1-2 of 2' with navigation arrows.

5. Confirm the changes you made to the group. There will be a summary of the updates. Click **“Update Group”**.
(Screenshot next page.)



Deleting an Account Group

1. To delete a group, select the **“Customize Home Screen”** button on the Accounts screen. Then select **“Account Preferences”**.
2. On the Account Preferences screen, select the **“Groups”** tab. Select the desired group from the dropdown, then click the trashcan icon .
3. A popup will display asking to confirm you want to delete the group, click **“Delete group”**.



4. An onscreen message will confirm that the group has been successfully deleted.

Please note: Default groups cannot be deleted. Please edit the group to remove the default indicator or select another group as default before deleting.