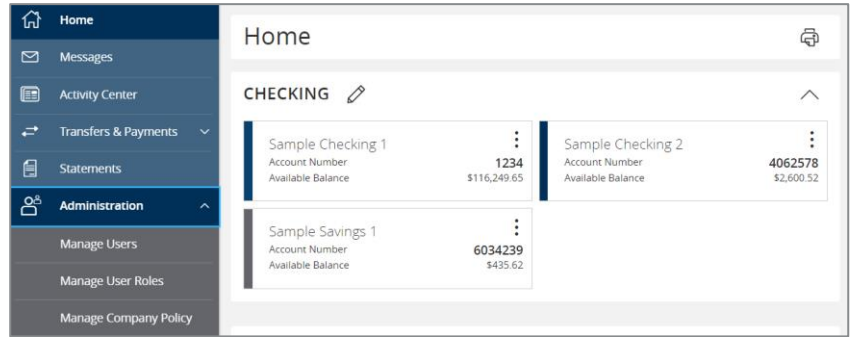
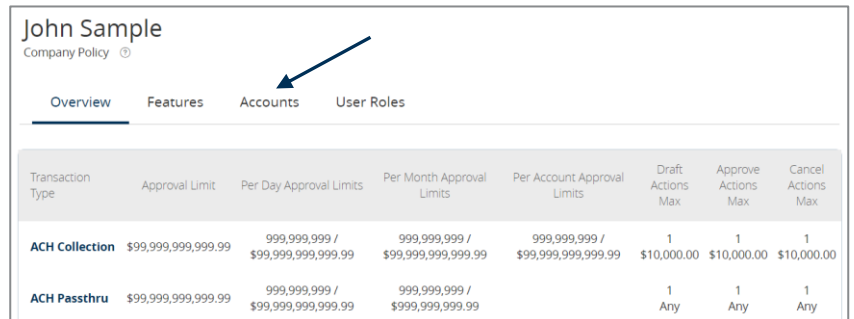


NOTE: Account Labeling allows you to group accounts for easy identification. Only User Administrators will have access to this function.

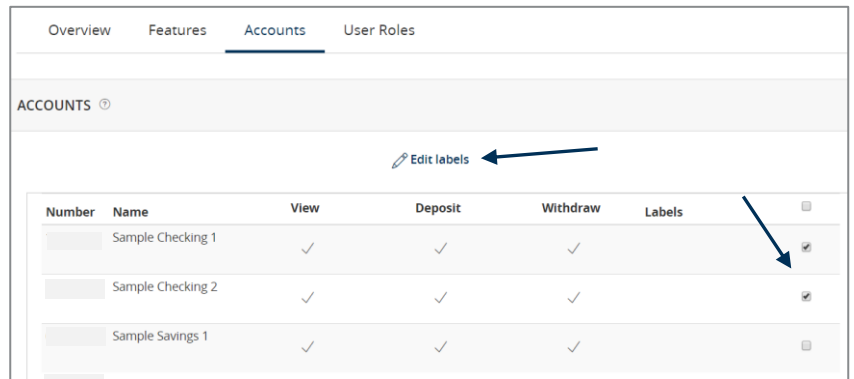
Select the 'Administration' menu then select 'Manage Company Policy'.



1. Select 'Accounts' tab within the top row.



2. Check the box next to each account that you would like to label. Next, select 'Edit Labels' to start labeling your account(s).



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3. Enter a label name.
4. Select the 'Create' button.
5. Select 'Add' to label the chosen accounts.
6. Select 'Close'.

Add/Remove Labels
2 accounts selected

Sample

Create

Select All

Add Remove Close

NOTE: The label will be indicated next to each account that was selected.

7. Select 'Save' to save the changes to the Company Policy.

John Sample
Company Policy

Overview Features Accounts User Roles

ACCOUNTS

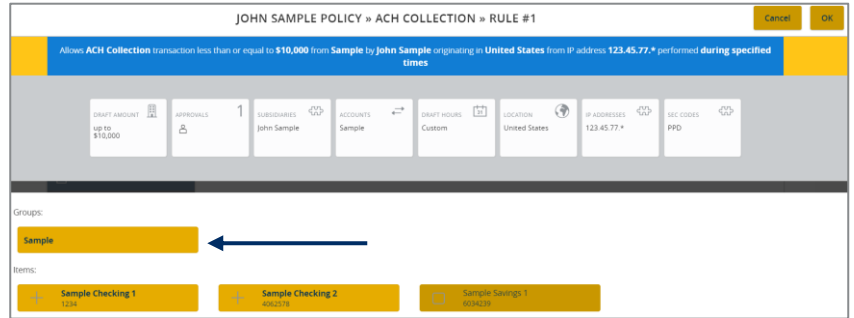
Edit Labels

Number	Name	View	Deposit	Withdraw	Labels	
1234	Sample Checking 1	✓	✓	✓	Sample	☑
4062578	Sample Checking 2	✓	✓	✓	Sample	☑
6034239	Sample Savings 1	✓	✓	✓		☐

Save

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NOTE: Account Labels can be used to quickly select grouped accounts within the Allowed Actions for Company Policy, User Roles and Information Reports.



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