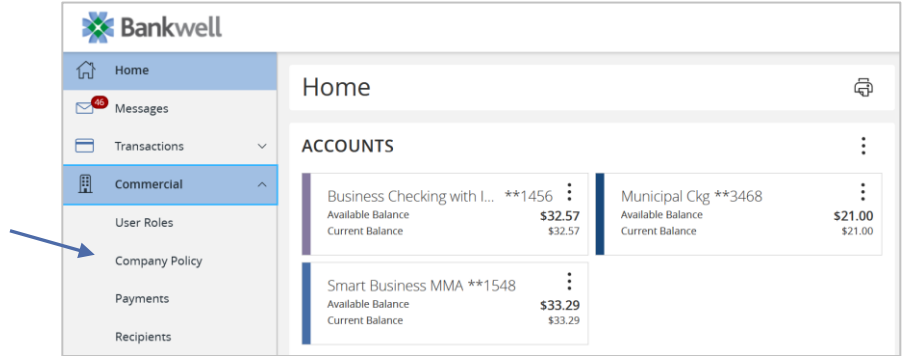
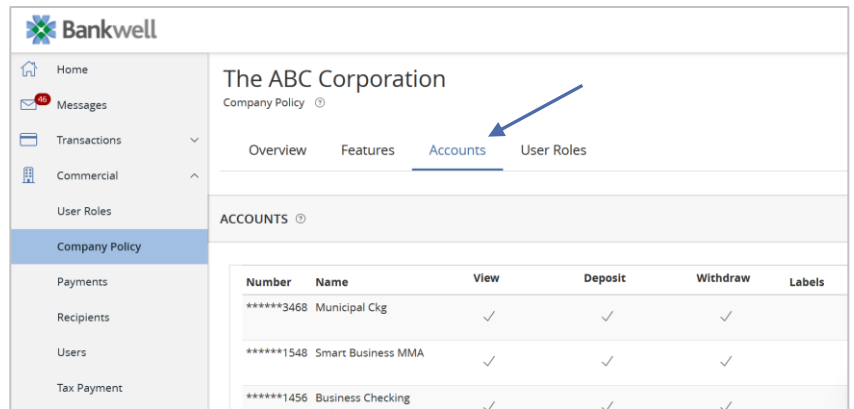


NOTE: Account Labeling allows you to group accounts for easy identification. Only User Administrators will have access to this function.

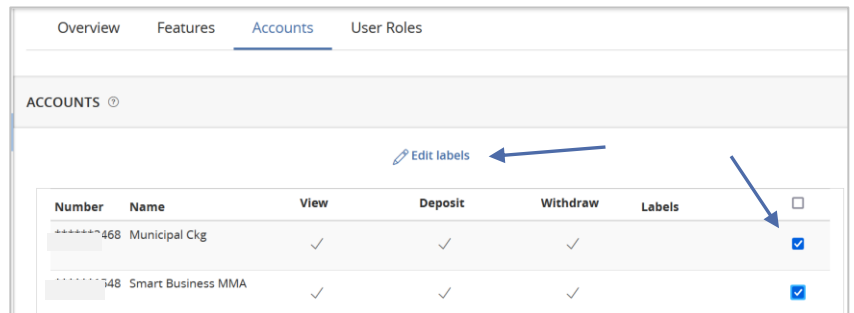
Select the 'Administration' menu, then select 'Company Policy'.



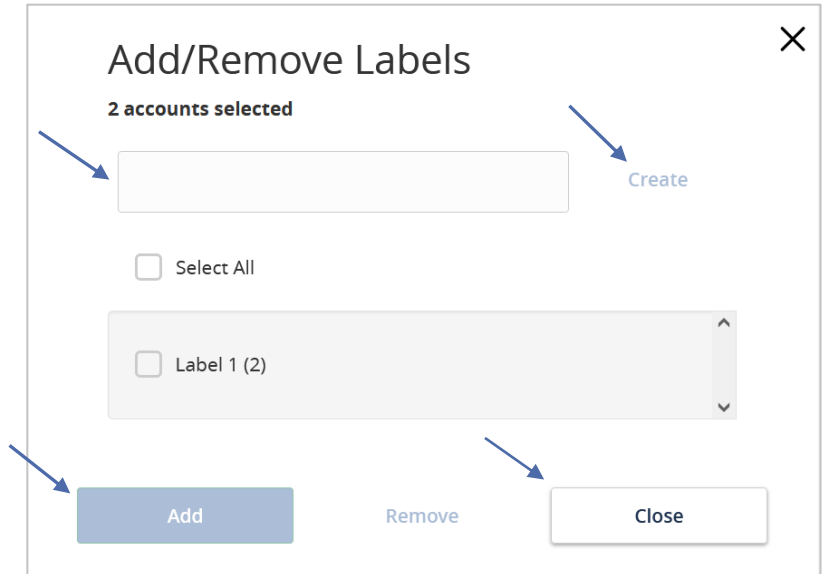
1. Select 'Accounts' tab within the top row.



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



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

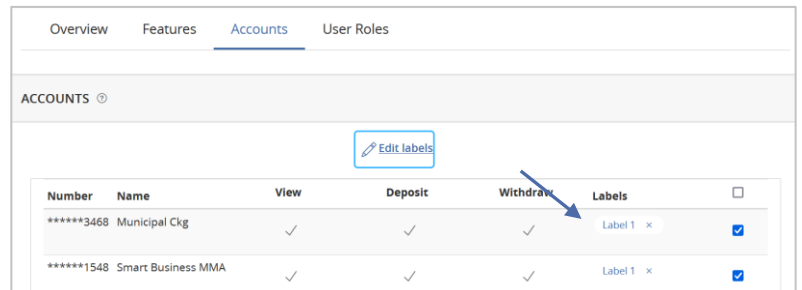
Select All

Label 1 (2)

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

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

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



Overview Features **Accounts** User Roles

ACCOUNTS ⓘ

Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
*****3468	Municipal Ckg	✓	✓	✓	Label 1 ✕	<input checked="" type="checkbox"/>
*****1548	Smart Business MMA	✓	✓	✓	Label 1 ✕	<input checked="" type="checkbox"/>