Custom Account Group – Quick Guide

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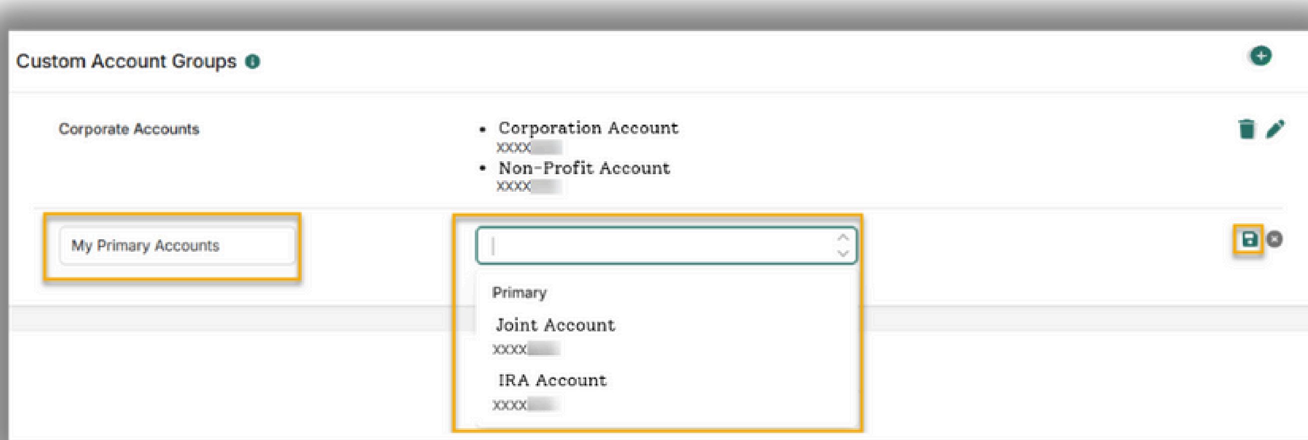
Custom Account Groups

Custom Account Grouping can be used to organize and control your view of the accounts you have access to. For example, you can separate your business accounts from your personal accounts using this feature.



To create a group, click on the plus sign symbol on the top right which will have a box to enter a new group name. Once you entered the new group name, you may select the eligible accounts from the next box then save it with the floppy disk. You are able to edit or delete your Custom Account Groups at any time by using the pencil to edit and delete using the trash bin .

Default View

You can select a default account or account group to automatically display on the Dashboard, Portfolio, Activity and Documents pages. Custom Account Group will show at the top before your account list. Select the group you want to see as default by clicking the circle to the right of the group name. Once selected, you will get a Success message on the top right of the screen.