

ACCOUNT LABELING

Account Labels allow you to label accounts for easy identification and information reporting purposes.

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NOTE: Account Labeling allows you to group accounts for easy identification.

1. Under the 'User Management' tab, select 'Company Policy'.

The screenshot shows the 'Accounts' page in the American Momentum Bank system. On the left, a navigation menu is visible with 'Company Policy' highlighted by a red arrow. The main content area displays a grid of account tiles for 'Momentum @ Work', 'Basic Business', 'Basic Checking', and 'Preferred RLOC-1.5%'. A 'WELCOME!' banner is also present on the right side of the page.

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

The screenshot shows the 'AMB Corporate Demonstration' page. The 'Accounts' tab is selected and highlighted with a red arrow. Below the navigation tabs, a table lists the accounts with columns for Number, Name, View, Deposit, Withdraw, and Labels.

Number	Name	View	Deposit	Withdraw	Labels	
xxx0106	Association Int Ckg	✓	✓	✓		<input type="checkbox"/>
xxx0652	Basic Business	✓	✓	✓	Business Checking	<input type="checkbox"/>
xxx1281	Momentum @ Work	✓	✓	✓		<input type="checkbox"/>



Have questions?

Contact our Support Team at:

(866) 530-BANK (2265)

Or send us a secure email
by visiting:

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

AMB Corporate Demonstration
Company Policy

Overview Features **Accounts** User Roles

ACCOUNTS

[Edit labels](#)

Number	Name	View	Deposit	Withdraw	Labels
xxx0106	Association Int Ckg	✓	✓		<input checked="" type="checkbox"/>
xxx0652	Basic Business	✓	✓	✓	<input type="checkbox"/>
xxx1281	Momentum @ Work	✓	✓	✓	<input type="checkbox"/>

4. Enter a label name.
5. Select the 'Create' button.
6. Select 'Update' to label the chosen accounts.
7. Click 'X' to close out the box in the upper right hand corner after label is updated

Add/Remove Labels

Association Checking XXXXXX0092

Create

Select All

Update



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



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

Association Banking CIF Demo  Save 

Company Policy

Overview Features **Accounts** User Roles

ACCOUNTS 

Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
xxx0092	AB4 Assoc Check	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sample Label 	<input checked="" type="checkbox"/>
xxx0106	AB3 Assoc Int Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
xxx0114	Property Mgmt Chkg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>



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