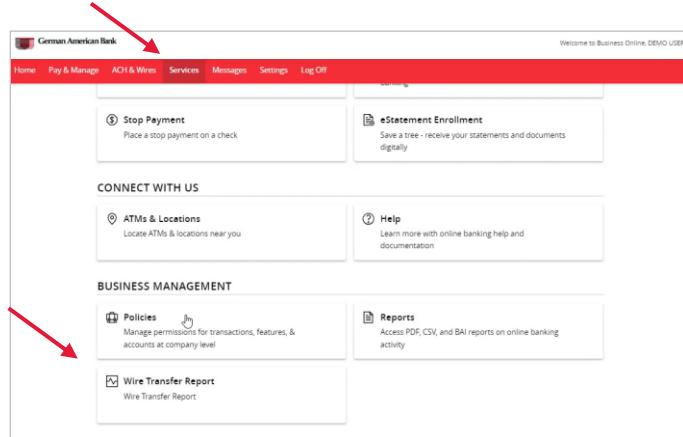
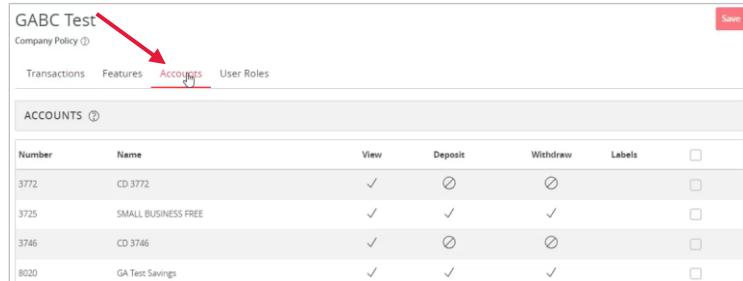


**NOTE:** Account Labeling allows you to group accounts for easy identification. Only User Administrators will have access to this function.

1. Select the 'Services' menu then select the 'Policies' tile.

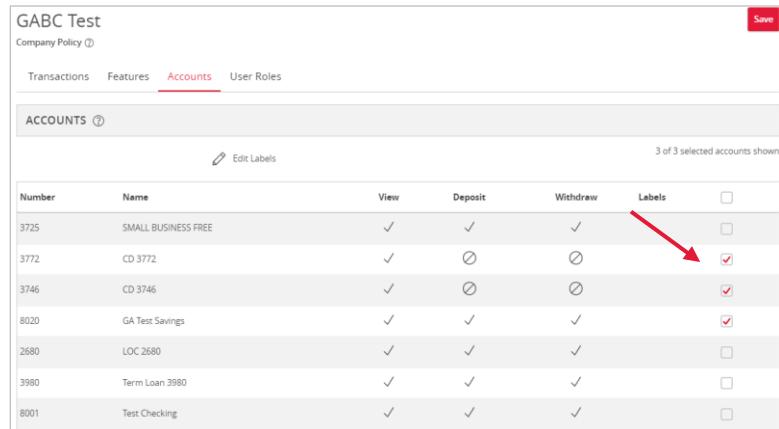


1. Select 'Accounts' tab within the top row.



Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
3772	CD 3772	✓	∅	∅		<input type="checkbox"/>
3725	SMALL BUSINESS FREE	✓	✓	✓		<input type="checkbox"/>
3746	CD 3746	✓	∅	∅		<input type="checkbox"/>
8020	GA Test Savings	✓	✓	✓		<input type="checkbox"/>

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



Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
3725	SMALL BUSINESS FREE	✓	✓	✓		<input type="checkbox"/>
3772	CD 3772	✓	∅	∅	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3746	CD 3746	✓	∅	∅	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8020	GA Test Savings	✓	✓	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2680	LOC 2680	✓	✓	✓		<input type="checkbox"/>
3980	Term Loan 3980	✓	✓	✓		<input type="checkbox"/>
8001	Test Checking	✓	✓	✓		<input type="checkbox"/>

We're here to help. Treasury Support: 800-697-0049  
[treasury.management@heartland.bank](mailto:treasury.management@heartland.bank)

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

**Add/Remove Labels**

3 accounts selected

Select all

6. Select 'Save' to complete the setup process.

**Add/Remove Labels**

3 accounts selected

Labels added

Select all

Test (New)

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

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

GABC Test

Company Policy ⓘ

Transactions Features **Accounts** User Roles

ACCOUNTS ⓘ

Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
3725	SMALL BUSINESS FREE	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>
3772	CD 3772	✓	∅	∅	Test X	<input type="checkbox"/>
3746	CD 3746	✓	∅	∅	Test X	<input type="checkbox"/>
8020	GA Test Savings	✓	✓	✓	Test X	<input type="checkbox"/>
2680	LOC 2680	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>
3980	Term Loan 3980	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>
8001	Test Checking	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>

**Save**

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

SELECT ACCOUNT(S)

Showing:  All  Selected

Select accounts by labels:

Test

Accounts:

Select all | Clear all

<input checked="" type="checkbox"/> CD 3746	3746	<input type="checkbox"/> CD 3772	3772	<input type="checkbox"/> Test Checking	8001
<input checked="" type="checkbox"/> SMALL BUSINESS FREE	3725	<input checked="" type="checkbox"/> GA Test Savings	8020		

3 accounts selected

**Cancel** **Submit**

We're here to help. Treasury Support: 800-697-0049  
[treasury.management@heartland.bank](mailto:treasury.management@heartland.bank)