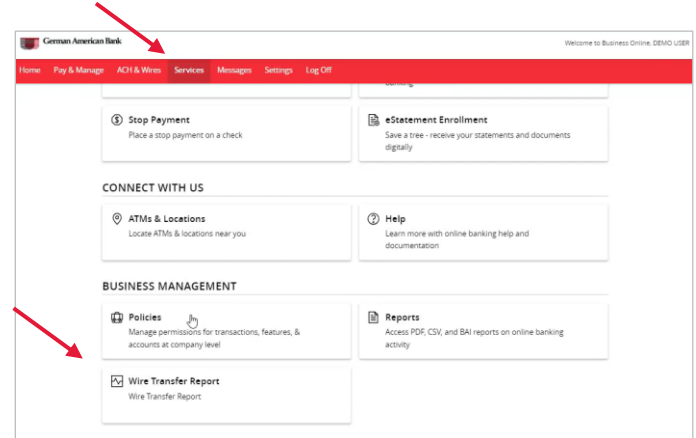


NOTE: Account Labeling allows you to group accounts for easy identification. Only User Administrators will have access to this function.

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



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

GABC Test
Company Policy (?)

Transactions Features **Accounts** User Roles

ACCOUNTS (?)

Number	Name	View	Deposit	Withdraw	Labels	
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).

GABC Test
Company Policy (?)

Transactions Features **Accounts** User Roles

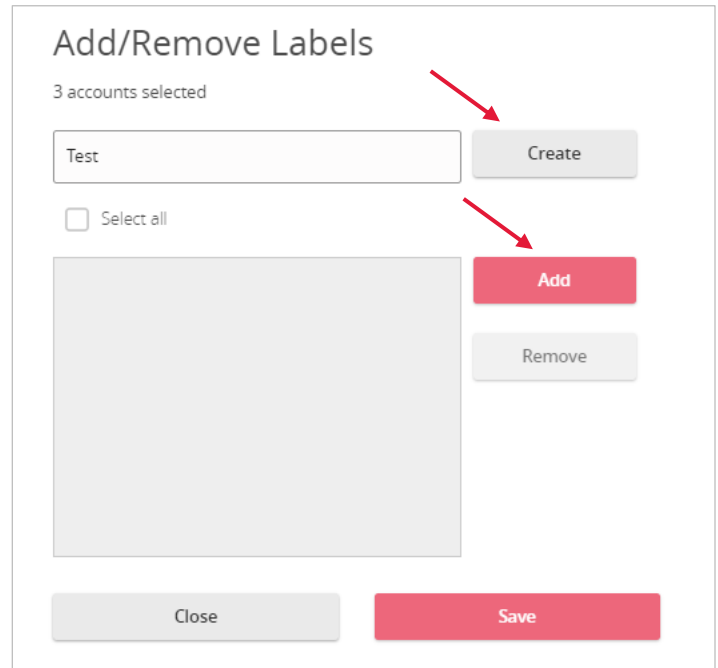
ACCOUNTS (?)

Edit Labels 3 of 3 selected accounts shown

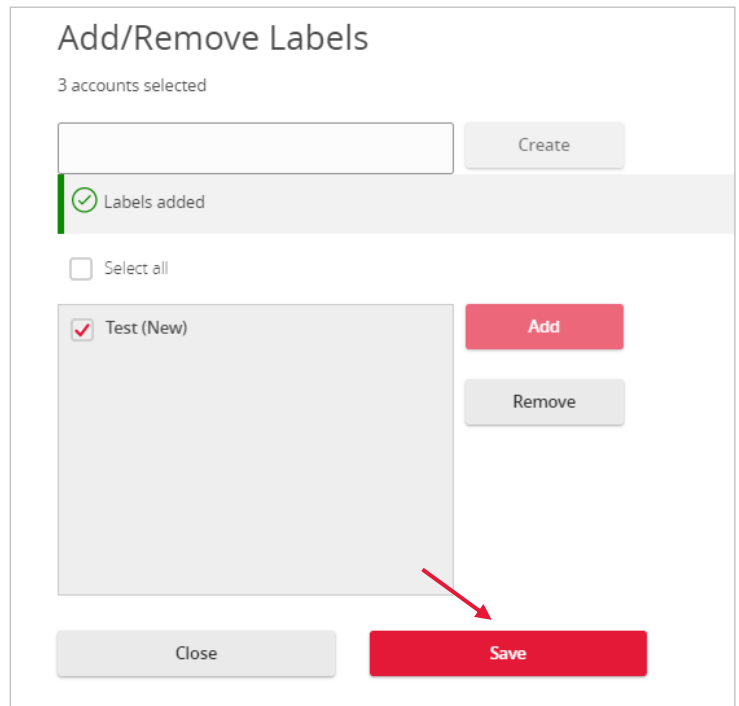
Number	Name	View	Deposit	Withdraw	Labels	
3725	SMALL BUSINESS FREE	✓	✓	✓		<input type="checkbox"/>
3772	CD 3772	✓	⊗	⊗	✓	<input checked="" type="checkbox"/>
3746	CD 3746	✓	⊗	⊗	✓	<input checked="" type="checkbox"/>
8020	GA Test Savings	✓	✓	✓		<input checked="" type="checkbox"/>
2680	LOC 2680	✓	✓	✓		<input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

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



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



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	
3725	SMALL BUSINESS FREE	✓	✓	✓		<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"/>
3980	Term Loan 3980	✓	✓	✓		<input type="checkbox"/>
8001	Test Checking	✓	✓	✓		<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

☒ CD 3746 3746 ☐ CD 3772 3772 ☐ Test Checking 8001

☒ SMALL BUSINESS FREE 3725 ☒ GA Test Savings 8020

3 accounts selected

Cancel Submit

