Create Custom Account Groups

1. Sign into your account using your email and password.

2. Navigate to the Manage Account Groups page, using the sidebar on the main page.

3. Select Create Custom Group to create a new custom account group.
4. Enter your desired custom account group name. You can fill in the group code field with whatever you would like to, but it needs something filled in to create the custom group.

In order to add accounts to the custom group, you can either select the automatic group you would like to add accounts from, or you can select “View all Accounts” to view all accounts that have been registered to your user. When adding accounts, you can search by partial account number.

Manage Custom Account Groups

1. Navigate to the Manage Account Groups page and click on the three vertical dots to the right of the account group you wish to edit, then select Edit.
To add accounts, follow the same process in step 5 in Create Custom Account Groups.

To delete accounts, click edit on the account you would like to modify, select the accounts you would like to delete, and select “Remove Accounts.”