

Access Digital: Manage Account Grouping

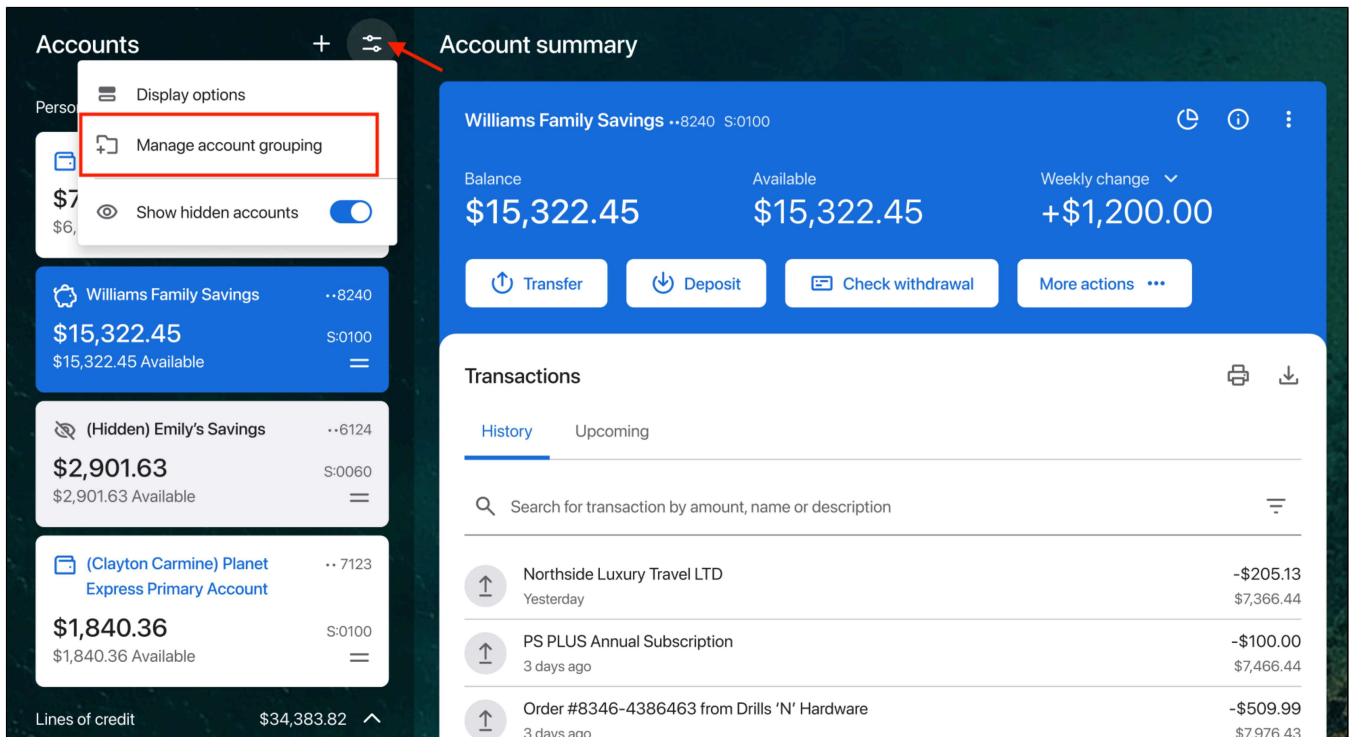
Overview

Your members can take advantage of Account Grouping to aggregate their accounts into customizable groups. Members can reorder and regroup their accounts however they like with our intuitive drag-and-drop interface, giving them faster access to their most-used accounts. If a member hasn't created any custom groups, all accounts will be displayed in the default group. To learn more about adding accounts to a group, see [Access Digital: Accounts](#).

- Overview
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 - Create a New Group
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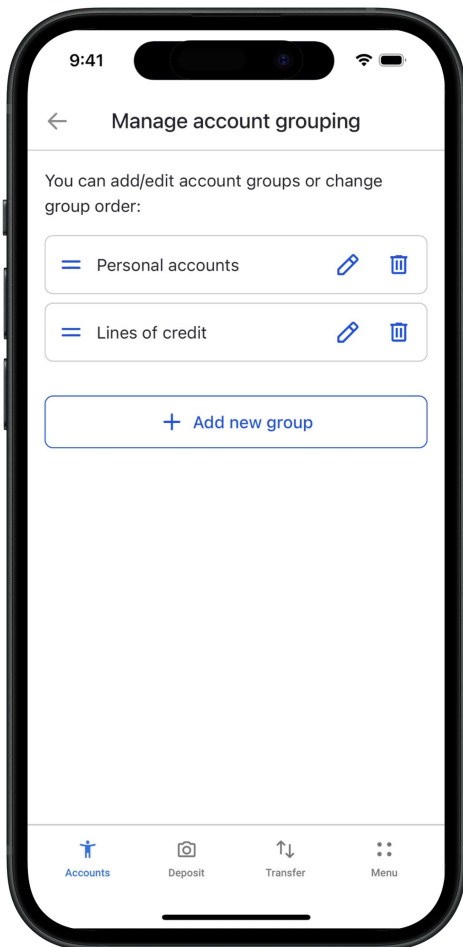
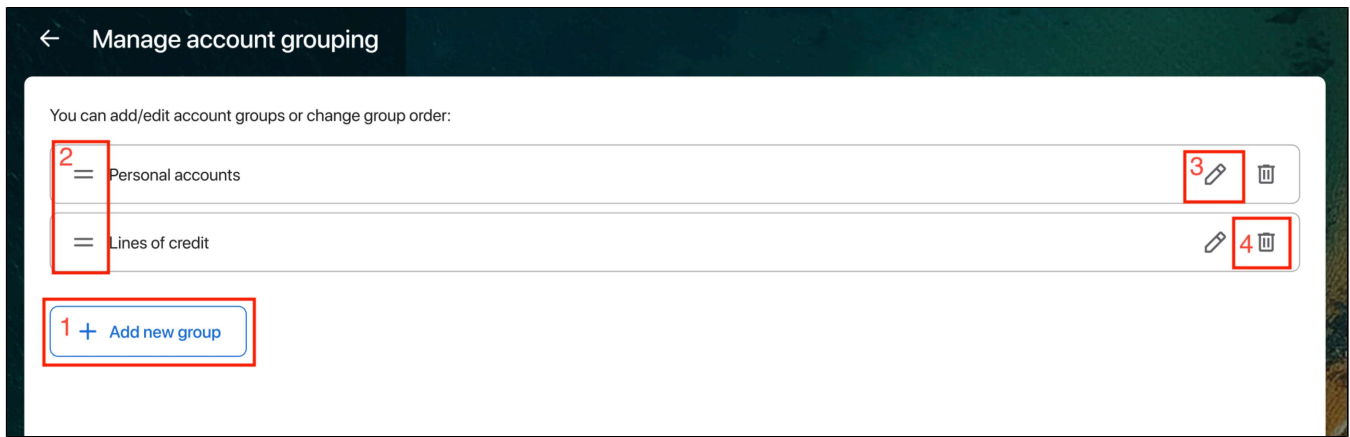
Manage Account Grouping

Your members can manage their account grouping on the Accounts Overview page by clicking the preferences icon and selecting **Manage account grouping**.



On the Manage account grouping page, your members can perform the following tasks:

- Create a new group
- Reorder groups
- Edit a group name
- Delete a group



Create a New Group

Your members can create custom groups to organize their accounts for easier access. If they don't create any groups, Access Digital automatically places all accounts in the default group, "Ungrouped Accounts."

1 In the Manage account grouping screen, click **Add new group**.

2 Enter a unique group name.

Each group must have a unique name. If you attempt to use the same name twice, you'll see an error message.

3

Click **Add group**.

The new group will appear in the groups list on the Accounts page. To learn more about adding accounts into the group, see [Access Digital: Accounts](#).

Reorder Groups

Your members can reorder their account groups by dragging and dropping them using the reorder icons.

The default group, Ungrouped Accounts, can't be moved. Access Digital doesn't display this group on the Manage account grouping screen.

Edit a Group Name

Your members can change a group name by clicking the edit icon next to the group name. A pop-up dialog will allow the member to choose a new group name.

The maximum length for a group name is 35 characters.

Delete a Group

Your members can delete any group, including empty groups and groups with accounts in them.

If a member deletes a group that contains accounts, those accounts are moved to the default group, Ungrouped Accounts.