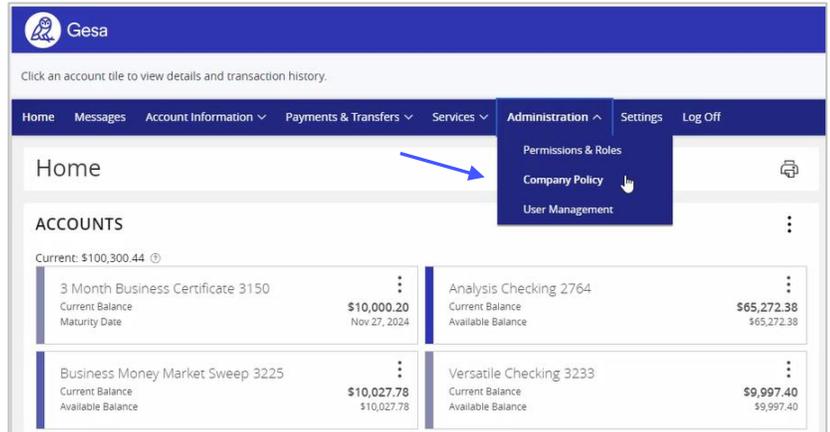


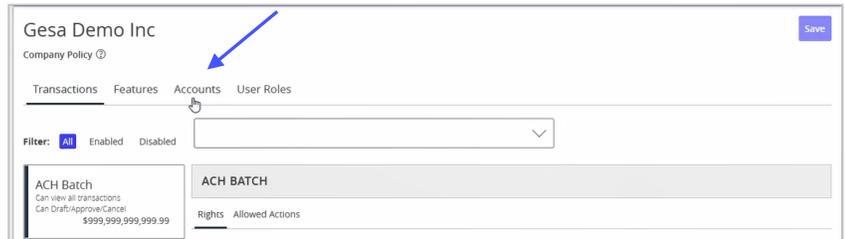


NOTE: Account Labeling allows you to group accounts for easy identification. Only Administrators will have access to this function.

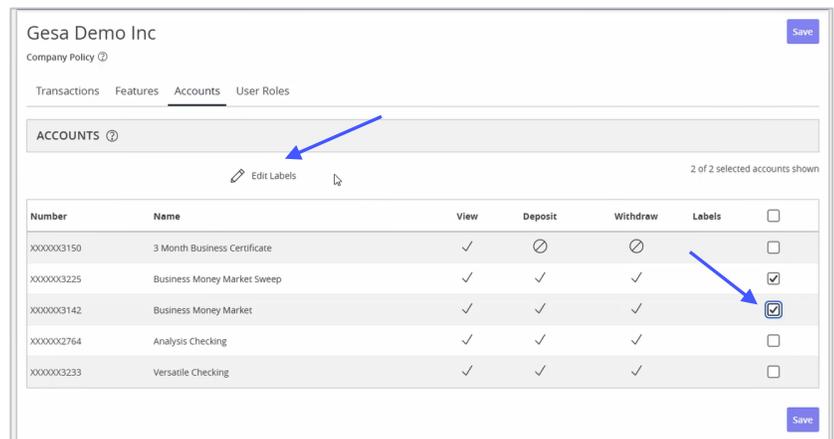
1. Select the "Administration" menu, then select "Company Policy".



2. Select "Accounts" tab.



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





4. Enter a label name.
5. Select the "Create" button.
6. Select "Add" to label the chosen accounts.
7. Select "Save".

Add/Remove Labels
2 accounts selected

Select all

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

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

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

Gesa Demo Inc. Good Afternoon, Penny Corp

Home Messages Account Information Payments & Transfers Services Administration Settings Log Off

Gesa Demo Inc.

Company Policy ⓘ

Transactions Features **Accounts** User Roles

ACCOUNTS ⓘ

Number	Name	View	Deposit	Withdraw	Labels	<input type="checkbox"/>
XXXXXX3150	3 Month Business Certificate	✓	⊘	⊘		<input type="checkbox"/>
XXXXXX3225	Business Money Market Sweep	✓	✓	✓	Business Accounts X	<input type="checkbox"/>
XXXXXX3142	Business Money Market	✓	✓	✓	Business Accounts X	<input type="checkbox"/>
XXXXXX2764	Analysis Checking	✓	✓	✓		<input type="checkbox"/>
XXXXXX3233	Versatile Checking	✓	✓	✓		<input type="checkbox"/>

Questions? We're here to help.
Contact us at (833) 322-1893 or at CBCC@gesa.com