

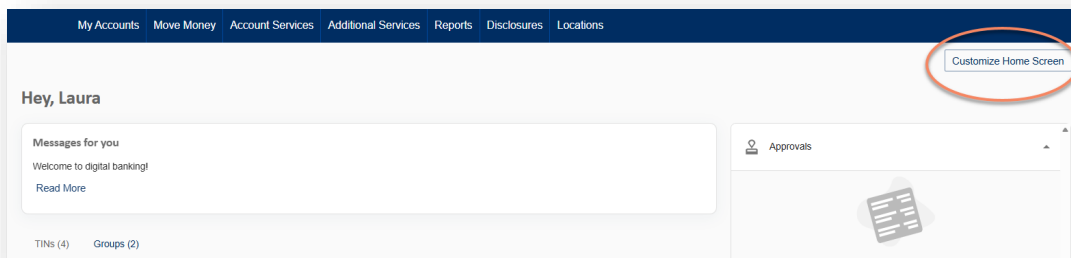
Account Grouping Instructions

Account Groups

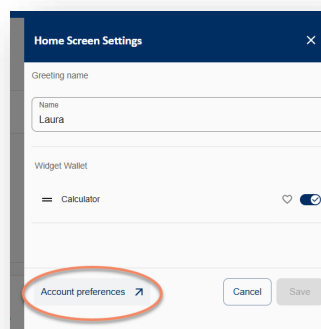
- Account Groups are available for businesses, which introduces a user-controlled, cross-TIN organization layer on top of the existing TIN structure.
- It improves personalization, navigation efficiency, and usability without altering entitlements or core account behavior.
- Account Groups is available for all user roles.
- Initially, the **Groups** tab displays an empty state message "**No groups yet**". This message remains visible until the user creates at least one group.
- Once a group has been created, a **Groups** dropdown selector is displayed. The dropdown lists all groups created by the signed-in user.
- The user's designated default group is automatically selected when the **Groups** tab loads.
- If only one group exists, that group is selected by default and displayed as the current value in the dropdown.
- If no groups exist, the dropdown does not display.
- Selecting a different group updates the page to display the accounts associated with the selected group.

Access and Setup for Account Groups

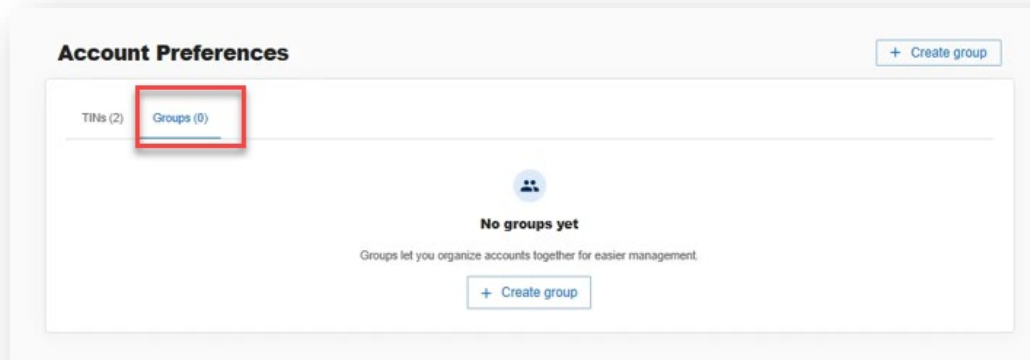
1. Log in to business banking.
2. Select the **Customize Home Screen** button under menu Account Services.



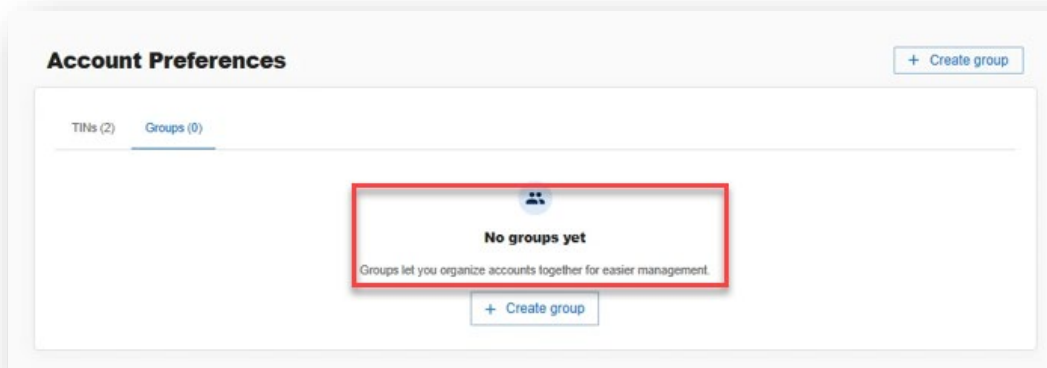
3. Select the **Account Preference** link to open the Account Preferences page.



4. The **Groups** tab is a new functionality that displays the number of groups created.

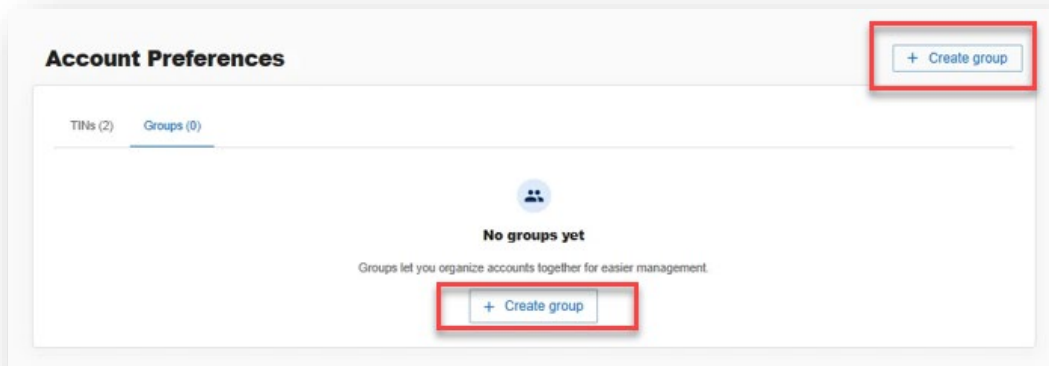


5. The initial display is an empty state displaying the message **No groups yet** until at least one group is created.

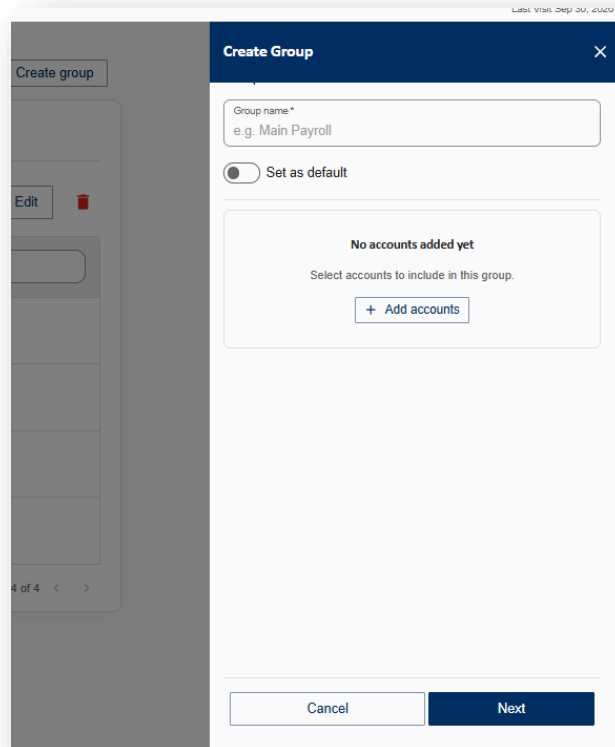


Creating A Group

1. Click on either **Create group** button.

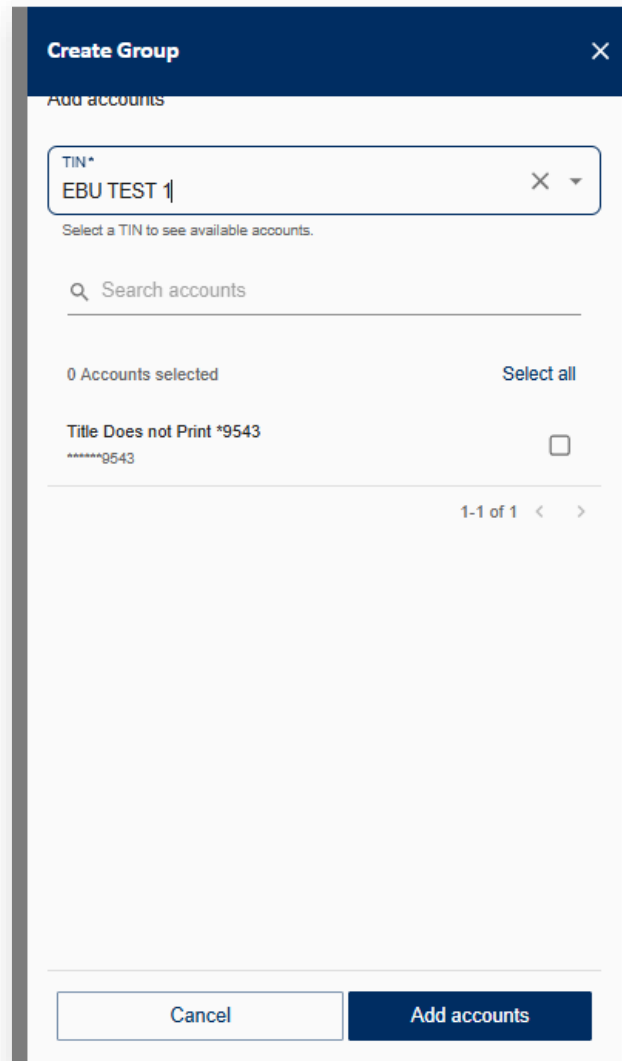


2. Enter a **Group** name, turn the toggle to **On** if this group should be set as default.
 - a. **Note:** The **Set as Default** toggle is not displayed when creating the first group because the initial group is automatically assigned as the default group. The toggle becomes available when additional groups are created and a default selection is required.
 - b. Only one group can be marked as a default.
 - c. When creating additional groups, a **Set as default** option is available.
 - d. Changing the default group displays an inline warning message that the prior default will be replaced.



3. Click the **Add Accounts** button and then add accounts.

4. Select the TINs, choose accounts that are to be included in this group, and then click **Add accounts**.
 - a. A **TIN** field with search and dropdown functionality allows selection from entitled TINs and accounts.
 - The dynamic search function allows the user to search by name or account number.
 - The **Account Count** displays along with **Select All** or **Deselect All** options.
 - Displays 10 accounts per page by default, with pagination capabilities.
 - Selecting at least one account is required to proceed to the **Account Order**.



Create Group [X]

Add accounts

TIN*
EBU TEST 1 [X] [v]

Select a TIN to see available accounts.

Search accounts

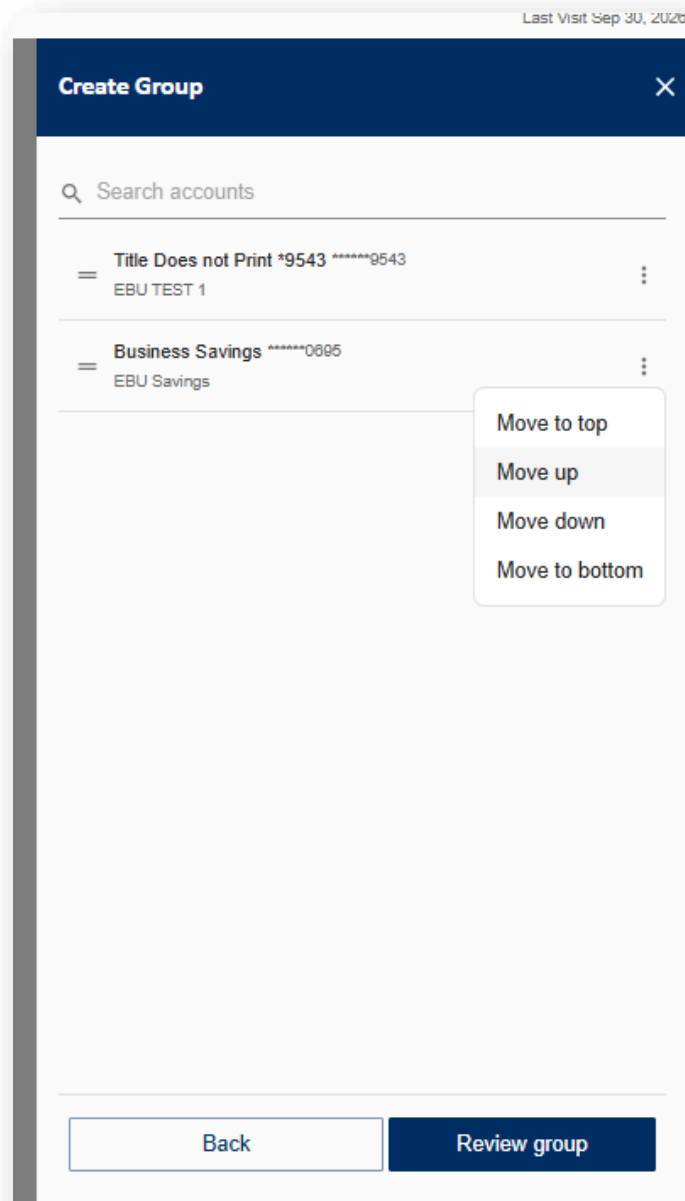
0 Accounts selected Select all

Title Does not Print *9543
*****9543 ☐

1-1 of 1 < >

Cancel Add accounts

5. Set the account order, and then click the **Review** group button.
- Users can reorder accounts (move account to top / up / down / bottom) within a group using:
 - Drag and drop
 - Using the three dots button
 - **Search** accounts feature allows the user to search for an account and provides the ability to move it to the top or bottom only.
 - Each group maintains its own account order independently.



6. Review the group. If everything is correct, click the **Create group** button. If the group is not correct, click the **Back** button to make additional changes.

Review group

Account Group 1

TINs	2
Accounts	2

TIN

View all

Search accounts

2 Accounts selected

Title Does not Print *9543 *****9543
EBU TEST 1

Business Savings *****0895
EBU Savings

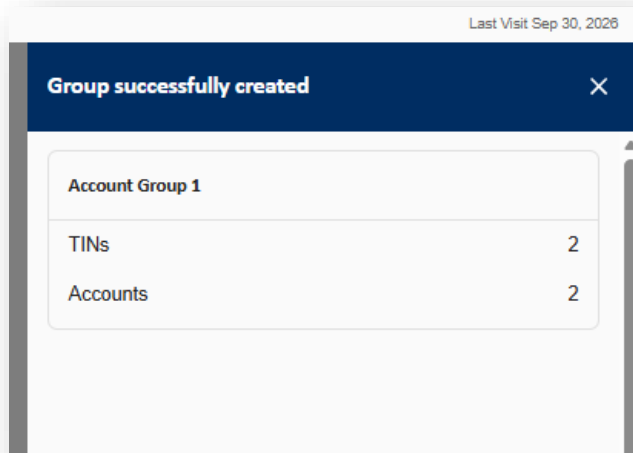
1-2 of 2

Back

Create group

7. Review the confirmation:

- a. A **Success** confirmation displays the summary of the group for all roles, the group name and account total. For Business Roles, the TINs total is also displayed.

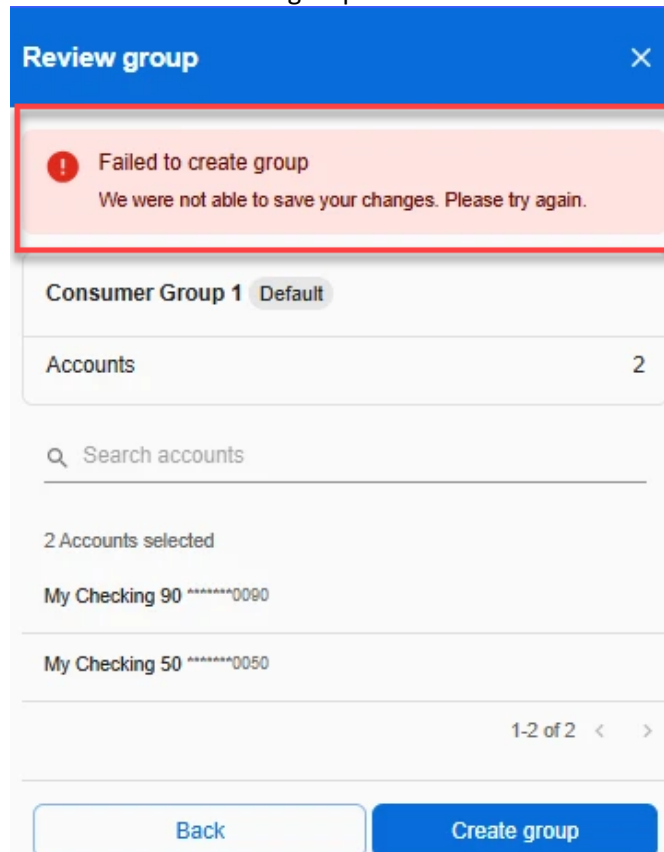


Group successfully created

Account Group 1

TINs	2
Accounts	2

- b. A **Failed** confirmation indicates the group was unable to be created.



Review group

Failed to create group
We were not able to save your changes. Please try again.

Consumer Group 1 Default

Accounts	2
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Search accounts

2 Accounts selected

My Checking 90 *****0090

My Checking 50 *****0050

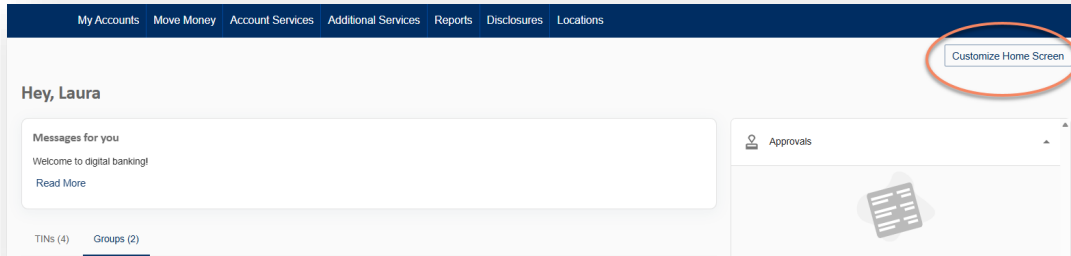
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Back Create group

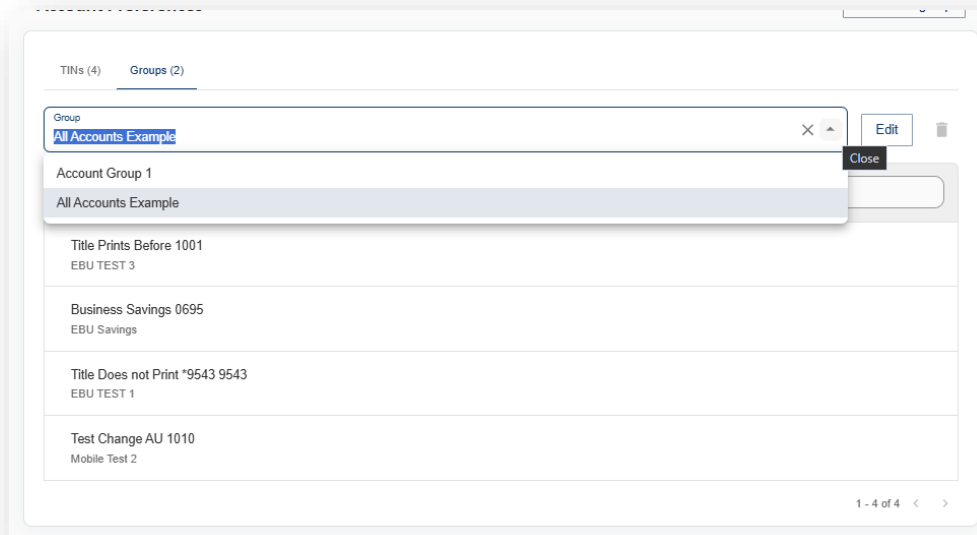
Editing a Group

Users can edit a group they have created.

1. Select the **Customize Home Screen** button under menu Account Services.



2. Select the **Account Preference** link to open the Account Preferences page.
3. Got to the **Groups** Tab and select the group, and select the **Edit** button.



4. From the Edit Group Screen, you can add additional accounts, remove accounts and then reorder if needed. Once you complete the steps, you'll receive a review screen prior to update the group. Select Update Group to complete the change.

Review group

All Accounts Example Default

TINs

3

Accounts

0 reordered 0 added 1 removed

3

TIN

View all

Q Search accounts

3 Accounts selected

Title Prints Before 1001

EBU TEST 3

Business Savings 0695

EBU Savings

Title Does not Print *9543 9543

EBU TEST 1

1-3 of 3 < >

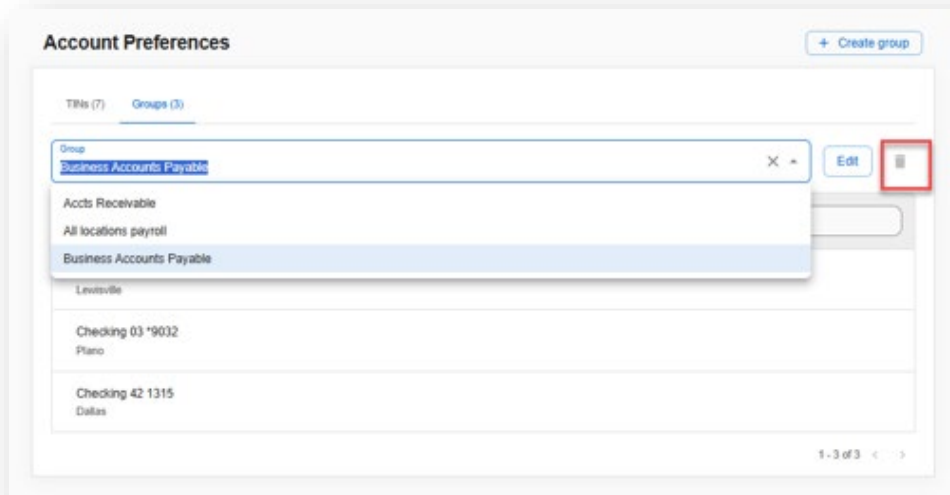
Back

Update group

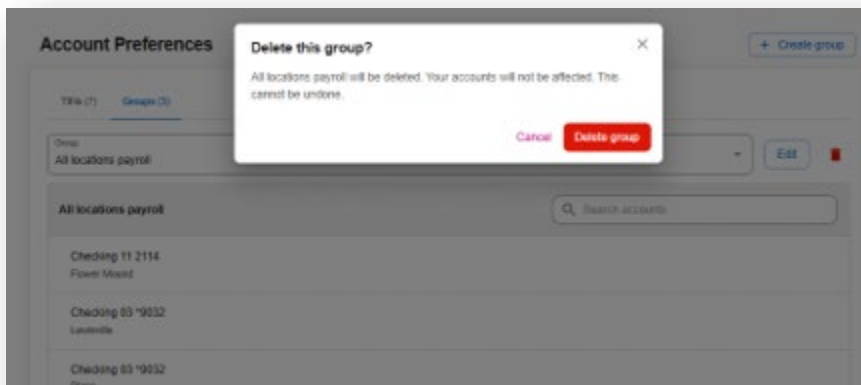
Deleting a Group

Users can delete a group they have created, provided the group is not designated as the default group.

1. Select the group to be deleted, and then click on the **Trash Can** icon. A **Default** group cannot be deleted while it is designated as a default. A message will display indicating the user needs to set up another group as a default to delete.
 - a. Deleting a group does **not** affect underlying accounts or entitlements.
 - b. The action is irreversible.



2. Users are prompted to confirm the deletion before the group is deleted.
 - Click the **Delete group** button to proceed with deleting the group.
 - Click the **Cancel** button if this group should not be deleted.



3. Review the confirmation message.
 - A **Success** confirmation displays indicating the account was deleted.