



Parkside Financial

BANK & TRUST



Treasury Management
Online Platform

Grouping Accounts

DASHBOARD | GROUPING ACCOUNTS

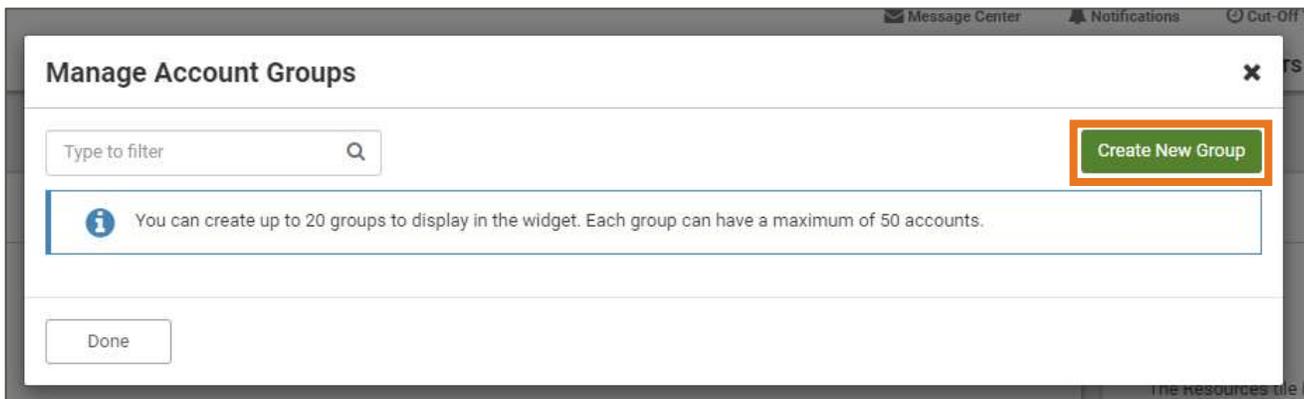
SELECT THE DASHBOARD TAB.



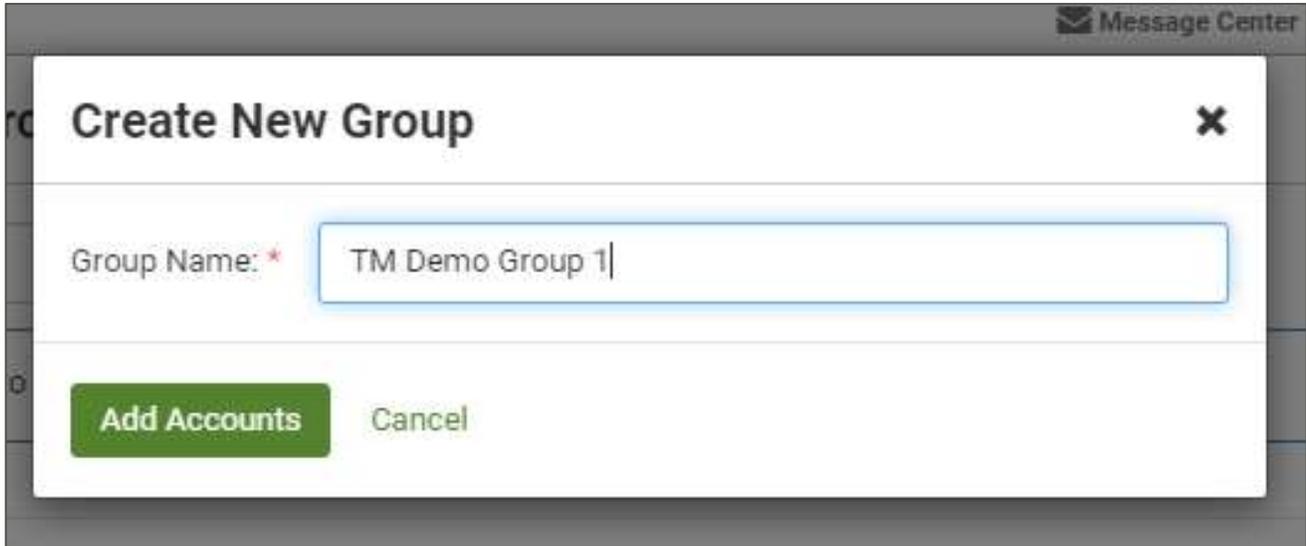
CLICK "MANAGE GROUPS".



CLICK "CREATE NEW GROUP".

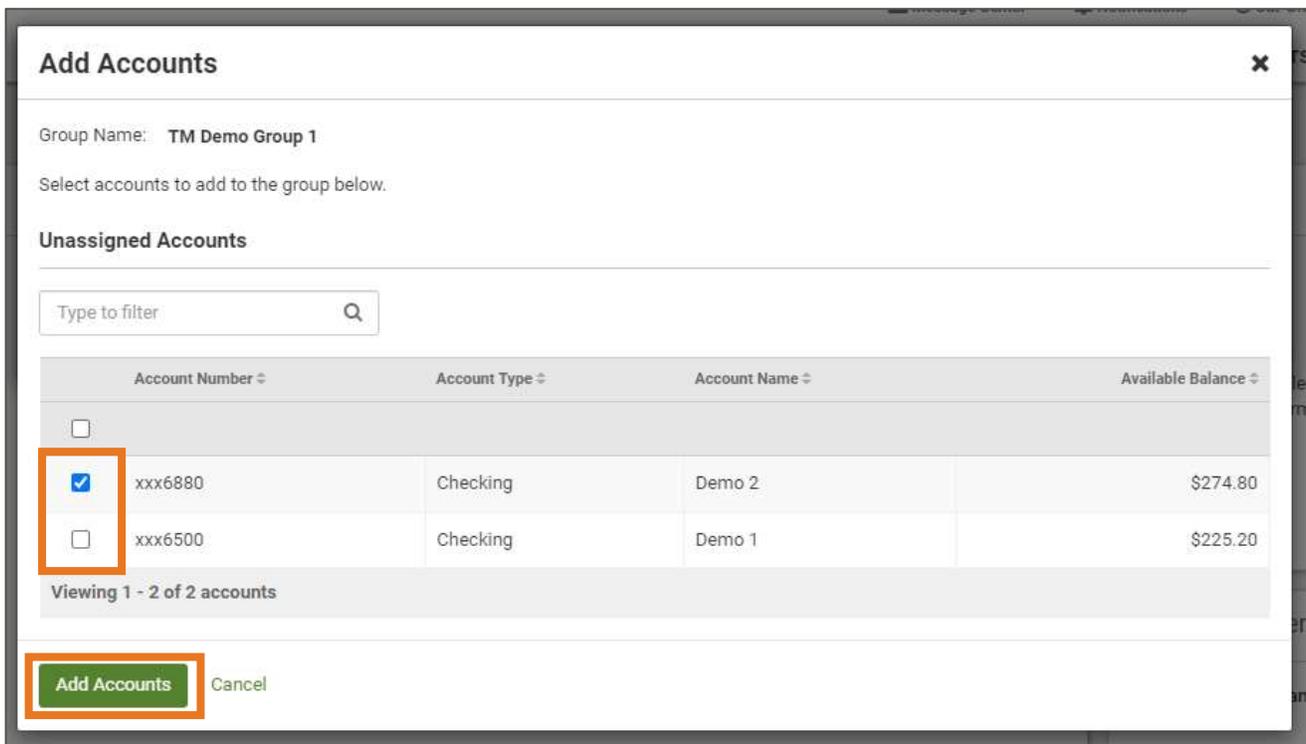


TYPE IN GROUP NAME AND CLICK “ADD ACCOUNTS”.



The screenshot shows a 'Create New Group' dialog box with a 'Message Center' icon in the top right. The title bar reads 'Create New Group' with a close button (X). Below the title bar is a text input field labeled 'Group Name: *' containing the text 'TM Demo Group 1'. At the bottom of the dialog are two buttons: a green 'Add Accounts' button and a grey 'Cancel' button.

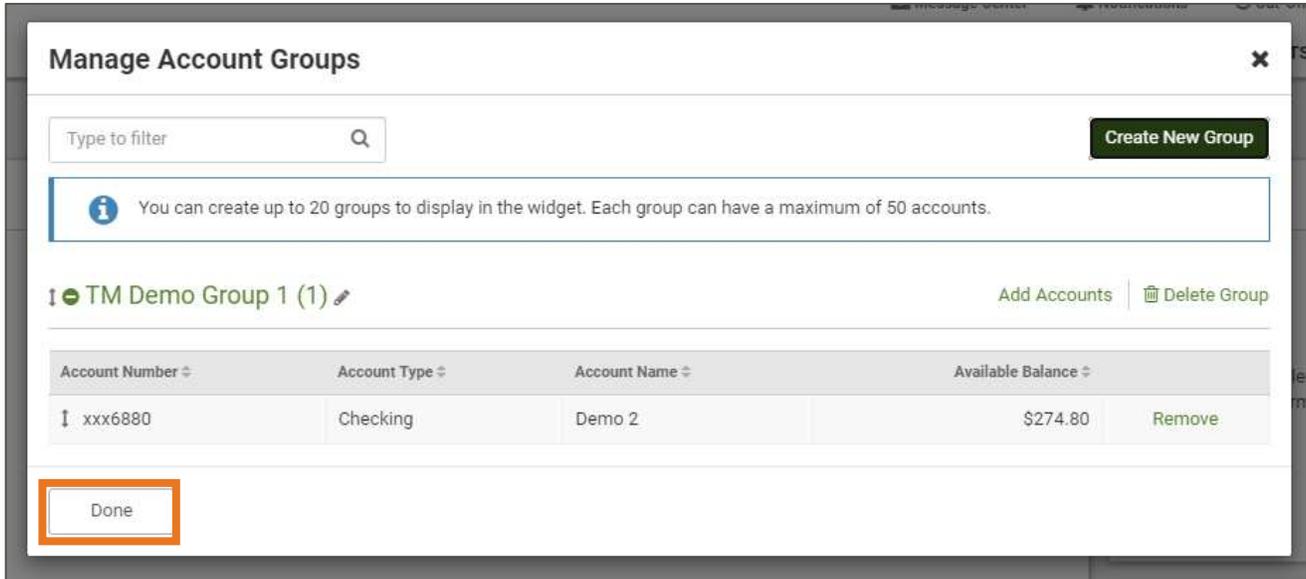
CHOOSE THE ACCOUNTS FOR THE GROUP AND CLICK “ADD ACCOUNTS”.



The screenshot shows an 'Add Accounts' dialog box with a close button (X) in the top right. The title bar reads 'Add Accounts'. Below the title bar, it shows 'Group Name: TM Demo Group 1' and the instruction 'Select accounts to add to the group below.' Under the heading 'Unassigned Accounts', there is a search bar with the placeholder text 'Type to filter' and a magnifying glass icon. Below the search bar is a table with the following columns: 'Account Number', 'Account Type', 'Account Name', and 'Available Balance'. The table contains two rows of data. The first row has a checked checkbox, account number 'xxx6880', type 'Checking', name 'Demo 2', and balance '\$274.80'. The second row has an unchecked checkbox, account number 'xxx6500', type 'Checking', name 'Demo 1', and balance '\$225.20'. Below the table, it says 'Viewing 1 - 2 of 2 accounts'. At the bottom of the dialog are two buttons: a green 'Add Accounts' button and a grey 'Cancel' button.

Account Number	Account Type	Account Name	Available Balance	
<input checked="" type="checkbox"/>	xxx6880	Checking	Demo 2	\$274.80
<input type="checkbox"/>	xxx6500	Checking	Demo 1	\$225.20

CLICK DONE.



Manage Account Groups ✕

Type to filter

i You can create up to 20 groups to display in the widget. Each group can have a maximum of 50 accounts.

TM Demo Group 1 (1)

Account Number	Account Type	Account Name	Available Balance	
xxx6880	Checking	Demo 2	\$274.80	<input type="button" value="Remove"/>

THE GROUP HAS BEEN CREATED.