

Create Custom Account Groups

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

The image shows two side-by-side forms. The left form is titled "Customer Sign In" and contains fields for "Email" and "Password" with a "SHOW" link. Below these are checkboxes for "Remember me" and "Forgot Password", a "Pay as guest" link, and a "Sign in" button. A "Security Information" link is at the bottom. The right form is titled "New User?" and contains the text "Create your online account to pay your bill and sign up for services, alerts, and notifications." with a "Register" button.

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

The image shows a sidebar menu titled "Profile & Settings". The menu items are: "Manage Alerts & Reminders", "Manage Account Groups", "Update Information", "Change Password", "Change PIN", "Change Email", and "Cancel Online Service". A yellow arrow points to the "Manage Account Groups" option.

3. Select Create Custom Group to create a new custom account group.

The image shows the "Manage Account Groups" page. At the top, there is a heading "Manage Account Groups" and a sub-heading "Account groups gather individual accounts into a single list to make it easier for you to take actions for multiple accounts." Below this is a paragraph: "Add Account Group will give you access to all your accounts when you provide information about one of your accounts. Use Create Custom Group to organize accounts based on your need." There are two buttons: "Add Account Group" and "Create Custom Group". A yellow arrow points to the "Create Custom Group" button. Below the buttons is a section titled "Your account groups" with a search bar, "Sort by" dropdown, "Rows per page 5" dropdown, and "Page 1 of 1" navigation. There is a "Select all (3)" checkbox. Below that is a table with one row:

<input type="checkbox"/>	Brown and Breyer LLC	Created: Dec. 12, 2020 Accounts: 3	Automatic <input checked="" type="checkbox"/> Primary	⋮

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.

Manage Account Groups

Create a custom group

You can create a custom group to combine accounts from other account groups according to your need.

Enter a group name

Enter group code A group code...

Select the account group that contains the accounts you want to add to your custom group.

Brownberry Farms 3 Accounts

Search groups Sort by Rows per page 5 < Page 1 of 1 >

Select all (3)

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.

Select the account group that contains the accounts you want to add to your custom group.

Account group:

View all Accounts 8 accounts

Search Accounts Sort By Default

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.

Manage Account Groups


Account groups gather individual accounts into a single list to make it easier for you to take action for multiple accounts.


Add account group will give you access to all your accounts when you provide information about one of your accounts. Use create custom group to organize accounts based on your need.

Your account groups

Search Groups Sort By

Select all

<input type="checkbox"/>	Custom 01	Accounts: 2	Custom	
--------------------------	-----------	-------------	--------	---



Manage Account Groups

Account groups gather individual accounts into a single list to make it easier for you to take action for multiple accounts.

Add account group will give you access to all your accounts when you provide information about one of your accounts. Use create custom group to organize accounts based on your need.

Add account group

Create custom group

Your account groups

Search Groups

Sort By

Select all

<input type="checkbox"/>	Custom 01	Accounts: 2	Custom	
<input type="checkbox"/>			Automa	⋮
<input checked="" type="checkbox"/>			✓ Pri	

Selecting remove accounts removes the account group from your online

View Account

Edit

Remove

Make Primary

- ✓ 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."

Manage Account Groups

Custom Name Custom 01 Change name

Custom Code 0123 Change code

Number of Accounts: 2

Add Account

Accounts for Custom 01

Search Accounts

Q

Sort By

Default

1447320000

⋮

2369850000

⋮

Selecting remove accounts removes the account group from your online access.

Cancel

Remove Accounts