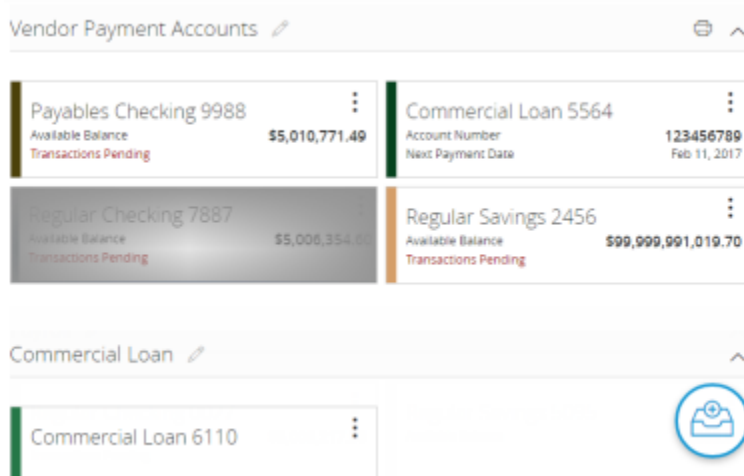


Grouping accounts

You can use the Account Grouping feature to categorize accounts on the Home page. If using a mouse, click an account card, hold the mouse button, drag the card to a new location, and release the mouse button. On a mobile device, tap a card, drag it to a new location, and lift your finger to drop it in that location.

Account grouping – Home page



To create a new account group, click or tap an account card and drag it to the New Group icon (📁) that appears in the lower-right corner of the screen while a card is being moved.

When the card is "dropped" on the New Group icon, the following field appears. Enter a name for the new group and click the check mark button to save the changes.

You can easily rename a group by clicking the pencil icon (✎) to the right of the title, editing the name, and clicking the check mark button to save the changes.