

Ascend How To: ACCOUNT TAGGING & SEARCHING

Account Tags

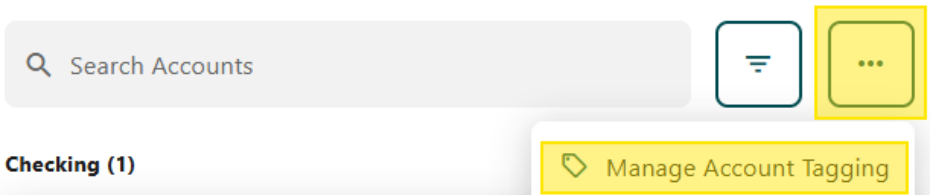
Account Tags is a simple way to allow users to tag accounts with custom labels and search for accounts. Right from the dashboard, you can manage tags by creating, renaming, deleting, and assigning them to accounts, all in one place. *This enhancement is for desktop only.*

Step One: Creating a Tag

From the dashboard, click the (...) menu and select 'Manage Account Tagging.'

Dashboard

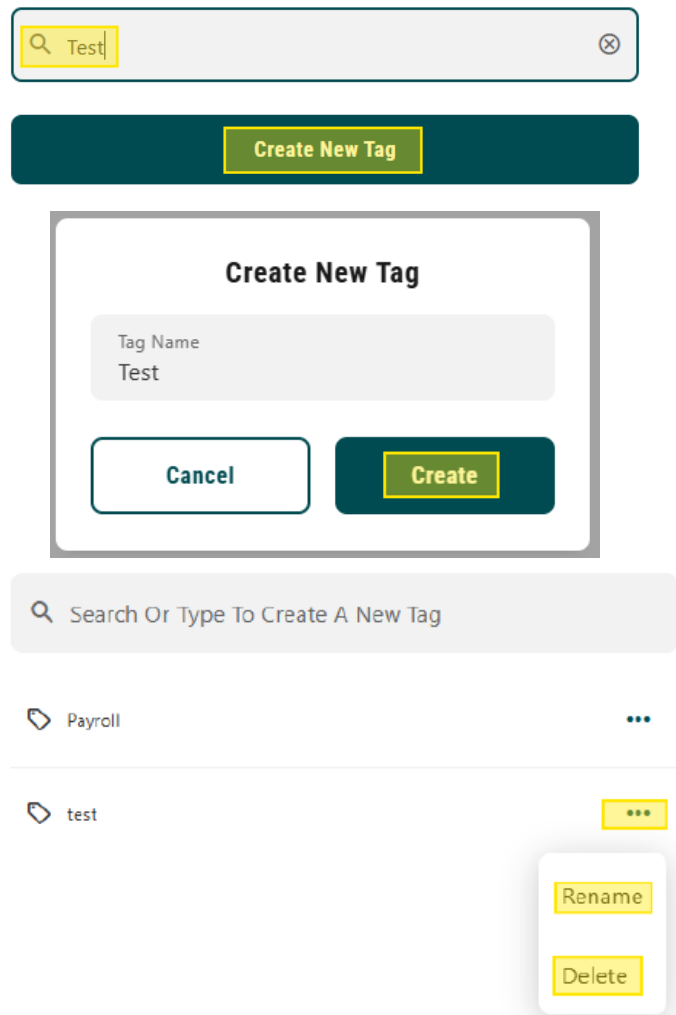
Accounts



Enter your new tag name, then click 'Create New Tag.' When the confirmation box appears, click 'Create.'

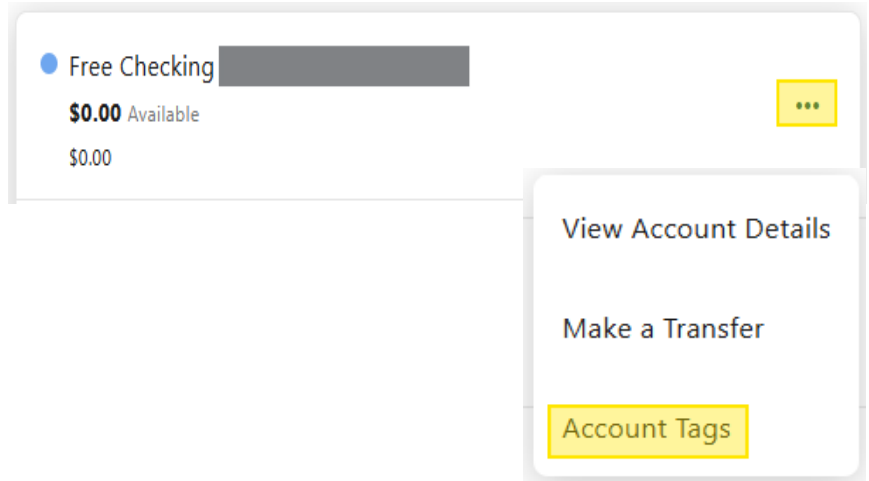
Note: If you click the (...) next to the tag name, you can rename or delete the tag.

My Tags



Step Two: Adding a Tag to Account(s)

Select the (...) next to the desired account to add a tag.

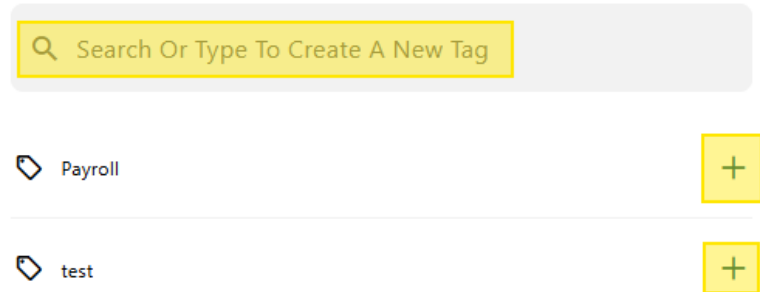


From this screen, use the search bar to find the desired tag, then click the (+) next to the tag to add it to the account. You can add multiple tags per account. Click 'Save' in the bottom right to confirm.

Free Checking [Redacted]

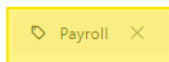
Add or Create Tags

Search existing tags or create a new tag.



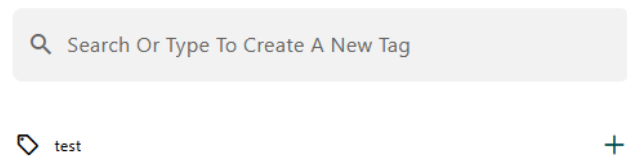
You can also create another new tag from this screen.

Free Checking [Redacted]



Add or Create Tags

Search existing tags or create a new tag.



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Account Search

Account Search makes it so you can now find the account you need fast without scrolling! Right from The Dashboard and Accounts pages just start typing in the search bar to instantly filter your account list. You can also use filters to narrow things down even further, making it faster and easier to find exactly what you need. *This enhancement is for desktop only, the app has its own version of search.*

In the search bar you can search for an account by the nickname, account type or the last four of the account number.

Dashboard

Accounts

Search Accounts



Dashboard

Accounts

Search Accounts



Using the filter icon you can filter and search by balance amounts, account type, or tags.

Advanced Filters

Minimum Balance

Maximum Balance

Find Tags

Checking

Loans

Savings

Clear Filters