How to Group Accounts on the Homepage
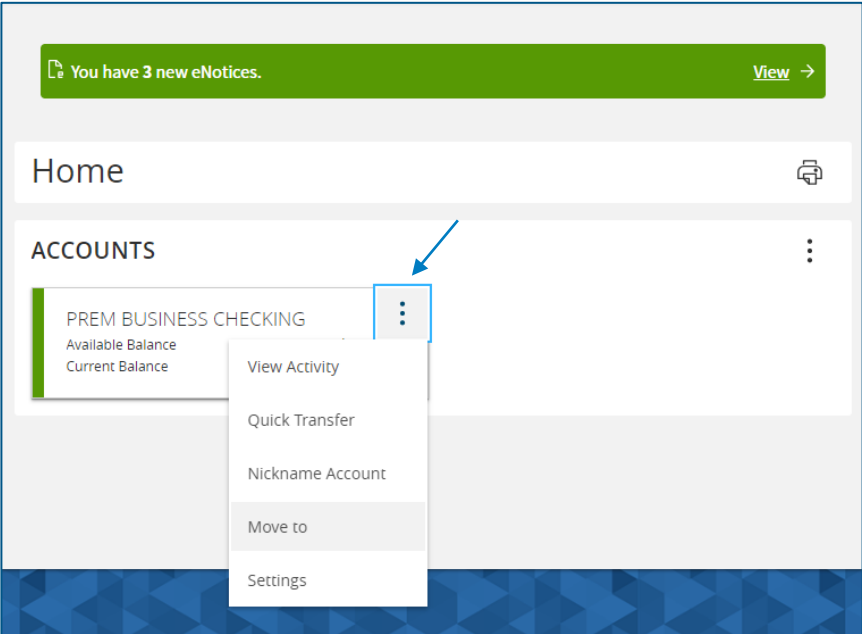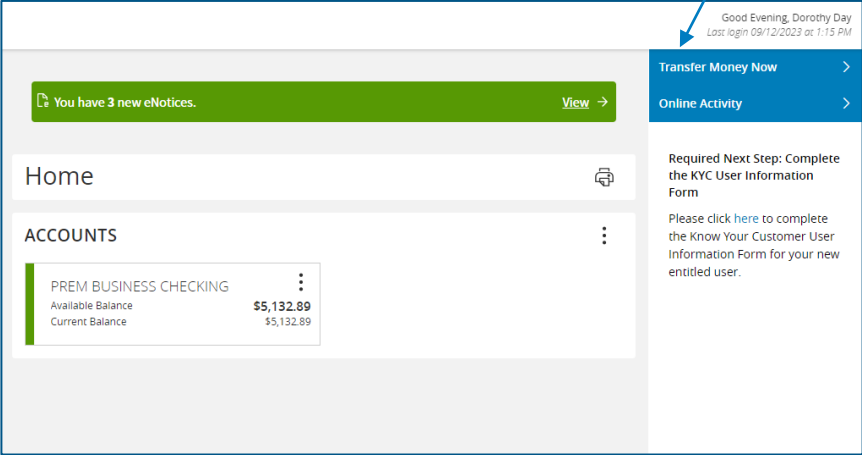
VIRGINIA Credit Union.

1. On the homepage, you'll see a listing of your accounts accessible within Business Online Banking.

2. Shortcuts to frequently visited areas like 'Transfer Money Now' and 'Online Activity' are located on the right side of the screen.

Good Evening, Dorothy Day
Last login 09/12/2023 at 1:15 PM

You have **3 new** eNotices.   View →

Transfer Money Now
Online Activity

Home

ACCOUNTS

PREM BUSINESS CHECKING
Available Balance $5,132.89
Current Balance $5,132.89

Required Next Step: Complete the KYC User Information Form

Please click here to complete the Know Your Customer User Information Form for your new entitled user.

3. Select the '3 dots' icon next to each account to reveal multiple available quick actions.

4. To create a grouping of accounts, click the 3 dots icon next to an account, then select 'Move to'.

You have **3 new** eNotices.   View →

Home

ACCOUNTS

PREM BUSINESS CHECKING
Available Balance
Current Balance

View Activity

Quick Transfer

Nickname Account

Move to

Settings

5. Select 'Create New Group' in the 'Select Group' dropdown menu.   Then enter the 'Group Name'.

6. Select 'Save'.

Move to

Move "Operating" to another group.

Select Group

Create New Group

Group Name

Group 1

Cancel   Save

Alternatively, you can also create a new group by selecting an account and dragging it down the page to an envelope that will appear in the lower right corner of the screen. NOTE: Additional account(s) may be moved into the newly created group or additional group(s) may be created if needed by repeating step 5.

You have 3 new eNotices.   View →

Home

ACCOUNTS

PREM BUSINESS CHECKING
Available Balance $5,13
Current Balance