Custom Account Groups - Quick Guide

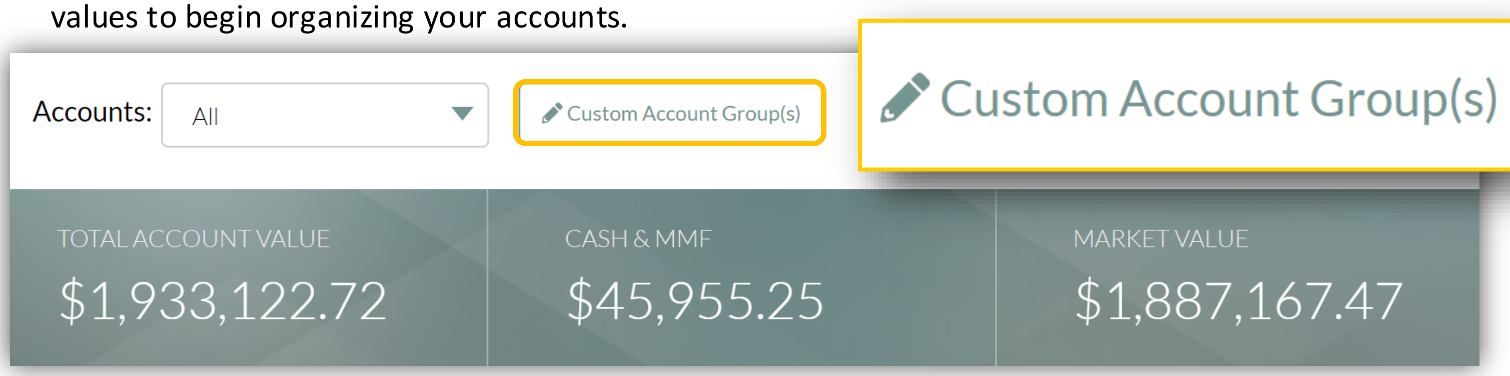
D|A|DAVIDSON

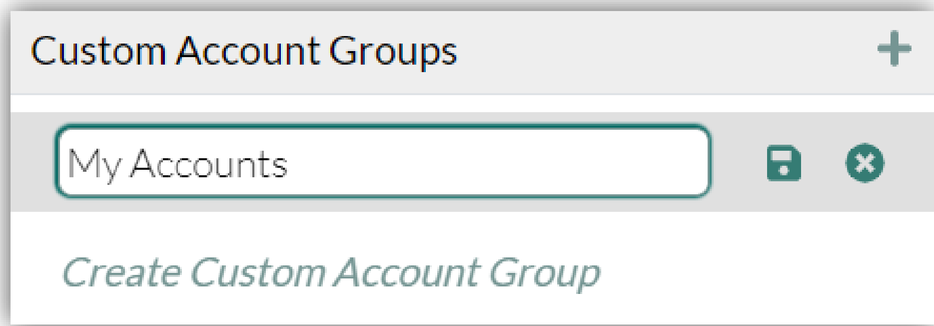
Client Access Support Team
1-800-575-9503
clientaccesshelp@dadco.com

Custom Account Groups

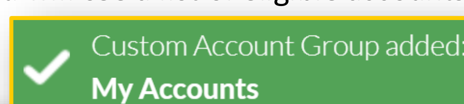
Custom Account Grouping can be used to organize and control your view of the accounts you have access to. For example, you can separate your business accounts from your personal accounts using this feature.

For your convenience, this can be found on the first page of the Dashboard or in the Settings menu. While you are on the Dashboard, click on “Custom Account Group(s)” located above your account values to begin organizing your accounts.

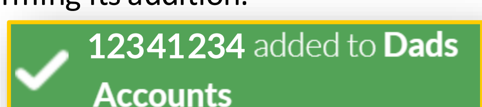


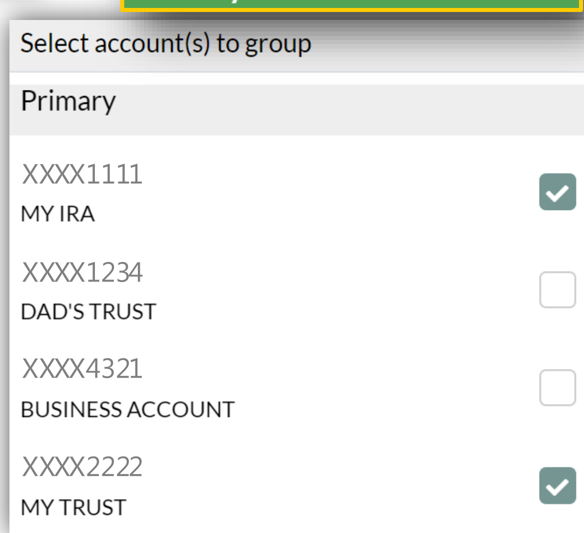


Start by clicking the add symbol. Once you have entered a new group name, you can save it with the floppy disk. After saving the group name, you will see a list of eligible accounts.



By adding a checkmark to the right of the account(s), you are indicating which accounts you are wanting to see with the group name selected on the left. Accounts that you checkmark will be saved as you select them, and a notice will appear confirming its addition.





You are able to edit or delete your Custom Account Groups at any time by using the pencil to edit and delete using the trash bin.

Custom Account Groups - Quick Guide

D|A|DAVIDSON

Client Access Support Team
1-800-575-9503
clientaccesshelp@dadco.com

ACCOUNT MANAGEMENT

Account Nicknames
create account nicknames

Custom Account Groups
create custom account groups

Default View
update default settings

Custom Account Groups - Settings

In your Settings, you are able create custom account groups and define your accounts in more detail. You will find complimentary features for your groups such as Account Nickname and Default View.

Settings
Logout

Custom Account Groups

Similar to the Dashboard, you are able to click on the plus to create a new group, or edit your current groups with the pencil .

Account Nicknames

Account No.	Account Registration	Account Nickname
Primary		
XXXX1111	JANE DOE ROTH IRA	My IRA

Accounts can be nicknamed for you to easily identify your eight digit account numbers. Just type in a nickname for your accounts and be sure to click save Save at the bottom of the page.

Custom Account Groups

Dads Accounts
- XXXX1234
- XXXX4321

My Accounts
- XXXX1111
- XXXX2222

Default View

You can select a default account or account group to automatically display on the Dashboard, Portfolio, Activity and Documents pages. Custom Account Group will show at the bottom after your account list. Select the group you want to see as default by clicking the circle to the right of the group name.