My Accounts

1. A listing of accounts the user has access to is shown in the middle of the screen.

2. The 'Transfer Money Now' option on the top right corner of the screen is a direct shortcut to the 'Transfer Funds' option within the 'Transactions' menu.

3. The 'Commercial Transactions' option on the top right corner of the screen is a direct shortcut to the 'Payments' option within the 'Commercial' menu.

4. The 'Treasury Agreement' option on the top right corner of the screen is a direct link to access the Veritex Bank treasury agreement.

5. Click the printer icon above the account listing towards the right side of the screen to print a listing of accounts.

6. The 'Asset Summary' at the bottom of the screen is a pictorial representation of the distribution of the accounts' assets.

7. Click on any account to go to the 'Account Details' page to view account details and transaction history associated with the account.

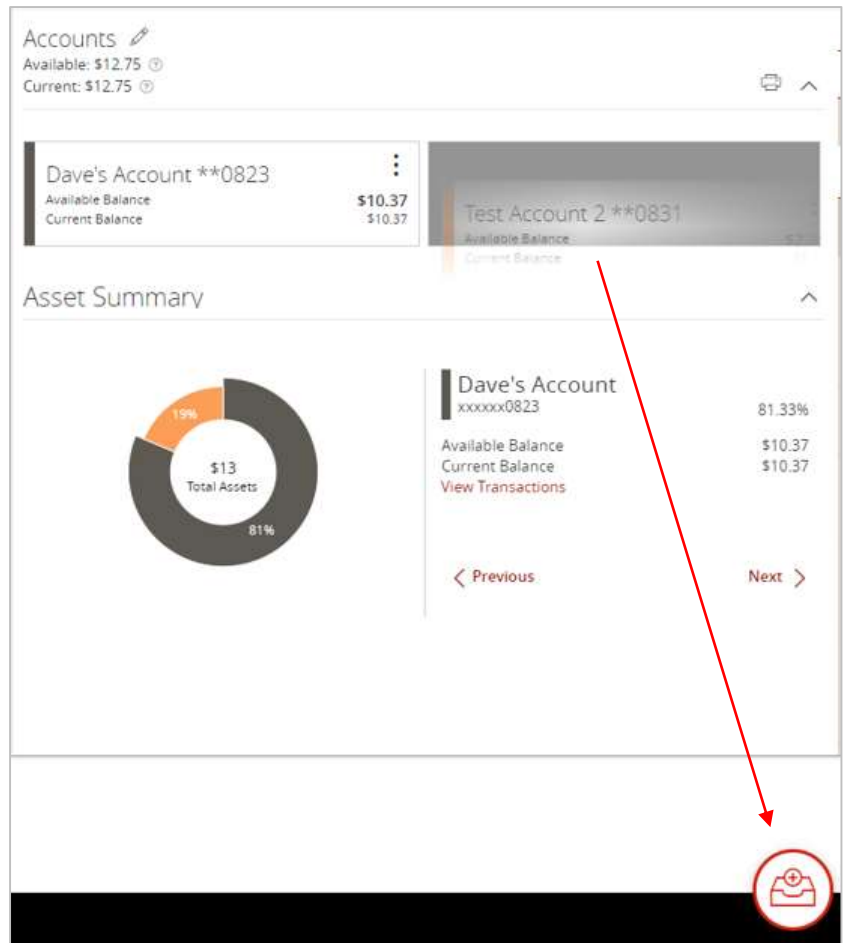8. Click the vertical dots on an account to view available actions.
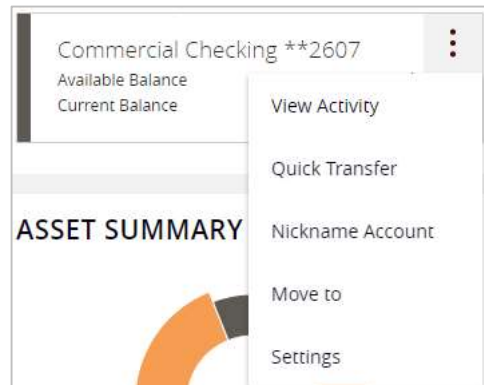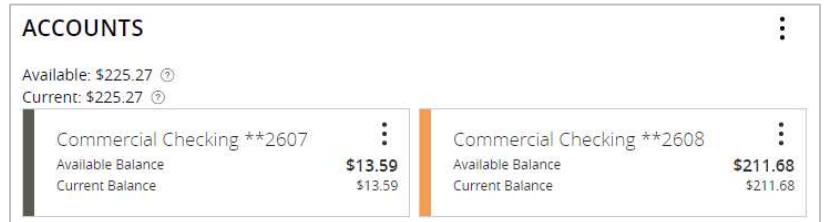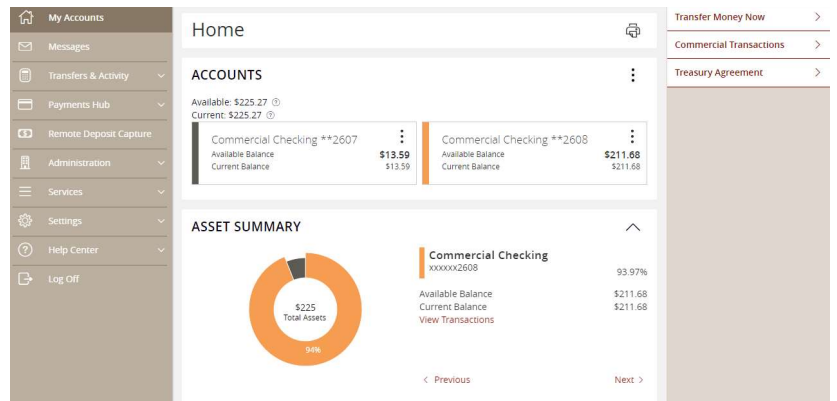
9. Select and drag an account to the envelope icon which appears at the bottom right side of the screen to create a new account group.

NOTE: Select the 'Move to' option displayed in step #8 as an alternate method for account group creation.

10. The new group created can be renamed according to need. Additional accounts may be dragged into the new group or additional groups created.