Ability to Create, Import, Modify and Delete Account Lists Now Available in Liberty

As TCA continues to migrate functionality to Liberty, managing account lists is now available.

The Account List functionality allows you to select a group of accounts and assign a name to the group. Account Lists may be shared with others or private to the creator.

Account List Management is accessed from the Accounts section of the Client Management tab. Click on the "Manage Lists" button in the action dock where you have the ability to Create, Import, Modify and Delete an existing Account List.

Please see the Liberty Account List Management User Guide to learn more about this feature.

Let your relationship manager know if you have questions and/or would like a demonstration of this feature.