

Gulf Capital Bank

Account Labeling

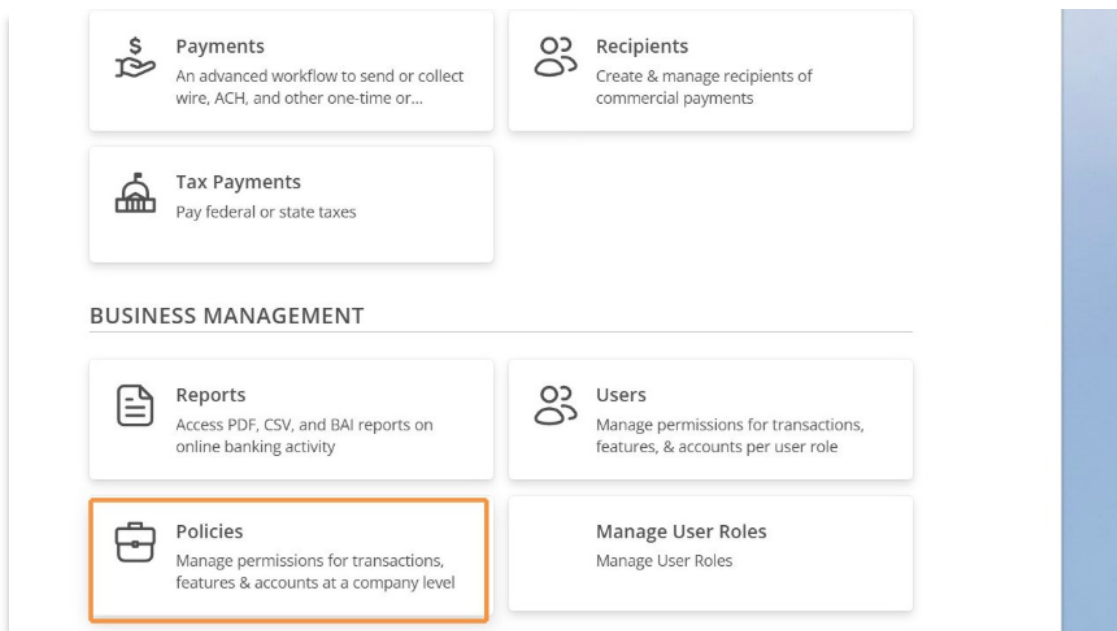
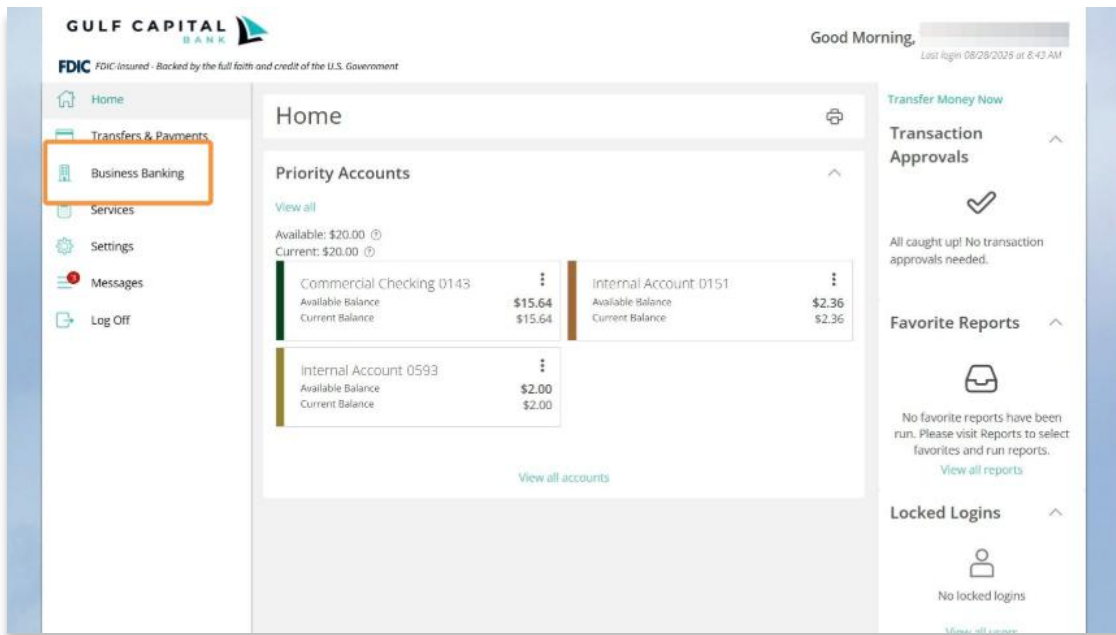
Digital banking designed
for your success.

GULF CAPITAL
BANK 
Banking Built For Houston



This guide walks you through navigating the business settings to configure specific account labels.

1. To create account labels, select the "Business Banking" menu and then select "Policies".



If you need additional assistance, please contact our Client Services Team at (713)999-8875.



2. Select the "Accounts" tab.

GULF CAPITAL BANK FDIC-Insured - Backed by the full faith and credit of the U.S. Government

Good Morning

Home
Transfers & Payments
Business Banking
Services
Settings
Messages
Log Off

Business 1
Company Policy ⓘ

Transactions Features **Accounts** User Roles

Filter: **All** Enabled Disabled

ACH Batch
Can view all transactions
Can Draft/Approve/Cancel
\$5.00

ACH BATCH
Rights Allowed Actions

ACH Collection
Can view all transactions
Can Draft/Approve/Cancel
\$10,000,000.00

Approval Limits

	Maximum Amount	Max
Per Transaction	\$ 5.00	

3. Check the box next to each account that you would like to label.

Company Policy ⓘ

Transactions Features **Accounts** User Roles

ACCOUNTS ⓘ

Edit Labels 1 of 1 selected accounts shown

Number	Name	View	Deposit	Withdraw	Labels	
0143	Commercial Checking	✓	✓	✓	Sample Label ✕	☐
0593	Internal Account	✓	✓	✓		☒
0151	Internal Account	✓	✓	✓	Sample Label ✕	☐
XXXXXX4649	External Checking	⊘	✓	✓		☐

Save

If you need additional assistance, please contact our Client Services Team at (713)999-8875.

4. Select "Edit Labels" to start labeling your account.

Business 1 Save

Company Policy ⓘ

Transactions Features Accounts User Roles

ACCOUNTS ⓘ

 Edit Labels 2 of 2 selected accounts shown

Number	Name	View	Deposit	Withdraw	Labels	
0143	Commercial Checking	✓	✓	✓	Sample Label ✕	☐
0593	Internal Account	✓	✓	✓		☒
0151	Internal Account	✓	✓	✓	Sample Label ✕	☐
XXXXXX4649	External Checking	⊘	✓	✓		☒

5. Enter the desired label name and then select 'Create'.

Add/Remove Labels

2 accounts selected

Create

☐ Select all

☐ Sample Label (2)

Add

Remove

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6. Select the "Add" button to label the chosen accounts.

Add/Remove Labels

2 accounts selected

Create

☐ Select all

☐ Sample Label (2)

☒ Test Label (New)

Add

Remove

7. Click the "Save" button.

✓ Labels added

☐ Select all

☐ Sample Label (2)

☒ Test Label (New)

Add

Remove

Close

Save

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8. The label name will be indicated next to each account that was selected. Accounts may be assigned to more than one label if desired. Select "Save" to save the changes to the Company Policy.

Good Morning, [User Name]

and credit of the U.S. Government

Business 1

Company Policy ⓘ

Transactions Features Accounts User Roles

ACCOUNTS ⓘ

Number	Name	View	Deposit	Withdraw	Labels	
0143	Commercial Checking	✓	✓	✓	Sample Label ✕	☐
0593	Internal Account	✓	✓	✓	Test Label ✕	☐
0151	Internal Account	✓	✓	✓	Sample Label ✕	☐
XXXXXX4649	External Checking	⊘	✓	✓	Test Label ✕	☐

Save

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