Open Banking Filter



Use this Open Banking filter to see which aggregation accounts have been switched over to an open banking connection and which users have not converted their eligible accounts. This feature is available by going to Personal Trading > Accounts > Select More Filters > elect the appropriate check box.

	RANSACTIONS	HOL	DINGS	ACCOUNTS	SECURITY MAST	ER				
N	More Filters	User Sea	rch SHOW F	ULL ACCOUNT # 🚫	SEE MY ACCOUNTS (ው ት	C Q Search		
	USER Î	BROKER	ACCOUNT NAME	ACCOUNT #	LAST SUCCESSFUL REFRESH	ACCOUNT = STATUS	CONNECTIONS = STATUS	ACCOUNT = TYPE		
	Q,	Q	Q	Q	Q -					
	Aaron Selkridge	Dag Site	DEALING	xxx078r	May 21 2020 2:43 pm	Closed	Inactive Feed	Aggregation	Ø	`
	Alexander James	Dag Site	IRA	xxx8212	Jul 19 2022 11:09 am	Open	Connection Active	Aggregation	0	
	Austin LaBar	Dag Site	DEALING	xxx078r	Jul 18 2022 9:56 pm	Open	Connection Active	Aggregation	0	
	Austin	D 01-	DAG		Jul 18 2022 9:32	0	Consultant Antion	A	0	(†
\cme	Capital Mana	gement						D 🔹 🙆 Ō	1 🌣	θ
	Capital Mana		DINGS	ACCOUNTS	SECURITY MAST	ER		D 🔠 🧿 Õ	1 🌣	θ
TR		HOL	DINGS	ACCOUNTS	SECURITY MAST	Open	Connection Active	P 🗘 🖉 🧿 🤉	•	θ
TR Shov Shov	ANSACTIONS	HOL Accounts r Accounts yees	DINGS	ACCOUNTS	SECURITY MAST					
TR Show Show Show OPEN	ANSACTIONS w Open Broker w Closed Broke w Active Employ w Inactive Employ	HOL Accounts r Accounts yees loyees			SECURITY MAST	Open	Connection Active	Aggregation	Ø	
TR Show Show Show Show Show	ANSACTIONS w Open Broker w Closed Broke w Active Employ w Inactive Employ I BANKING CONNEC w Aggregation	HOL Accounts r Accounts yees loyees TION Accounts Migrat	DINGS	9	SECURITY MAST	Open Closed	Connection Active	Aggregation Aggregation	0	
TR Show Show Show Show Show	ANSACTIONS w Open Broker w Closed Broke w Active Employ w Inactive Employ I BANKING CONNEC w Aggregation	HOL Accounts r Accounts yees loyees TION Accounts Migrat	led to Open Bankin	9	SECURITY MAST	Open Closed Closed	Connection Active	Aggregation Aggregation Aggregation	8	

The first check box will display any account that has been migrated to open banking.

The second check box will display any aggregation accounts that are eligible for migration, but have not migrated yet.

For more information, contact us here.