

Account Sort Names in Liberty



Account Name Display in Liberty

Liberty gives you the ability to control how you search for an account using the “Sort account name as” field (sort name). Recently, we identified inconsistencies in the way Liberty displays the account searches. In some instances, the search result displayed based off the legal name associated with an account, while other results displayed off the user defined sort name.

On October 19, 2023 we will sync the views so that all screens will display the user defined sort name on each account, thereby making it easier for you to quickly and accurately sort and identify client accounts.

Please contact your Client Service Advocate if you have any questions.

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