

Account Summary Report Redesign GUIDE



Balance **History** is a new submenu item.

Favorites is a new submenu item.

Refresh Balances using a new icon. (Previously accessed through a button in each pane.)

Column Adjustments are accessed through a new icon.

Gridlines are gone; shading of alternate rows guides your eye.

The first section reflects its new name – “Checking and Savings.”

Select “Expanded” from the dropdown menu to view the Expanded Account Summary report. (Previously accessed through a report button.)

Account Details are available through the Account Name, which is now a link. (This replaces the details link.)

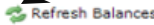
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5 New Messages

Home **Accounts** Payment & Transfers Checks & Deposits Reporting

Account Summary Account Detail | Controlled | Disbursement | Account Targets | Account Statement | Balances History | Favorites

Go To

 Refresh Balances

Bank Name - Account Summary

Checking and Savings

Account Name	Account Number	Date	Ledger Balance	Collected Balance	Available Balance
Total			\$247,060.62	\$180,887.04	\$205,887.04

Expanded ▼ Print Export ASCII (csv) ▼

Standard
Expanded

Loans

Account Name	Account Number	Date	Balance Amount
Operating Account			
Total			\$233,399.00

Print Export

Time Deposit

Account Name	Account Number	Date	Principal Amount	Current Amount
Total			\$233,399.00	\$245,399.00

Print Export

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