Quick View Search & Sort Guide

March 2021



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Introduction

Quick View allows you to search for a specific account by typing in characters or scrolling through the drop-down list. Accounts can be grouped and sorted on the Quick View screen. For increased efficiency, accounts in an Account Group can be sorted within their account type either alphabetically by account name/description, numerically by account number or dragged and dropped into a specific order. Accounts can be placed in multiple groups and a group can be selected as a default to appear on the Dashboard. The Dashboard and QuickView have quick access to creating a PDF of the account Transaction report.

Search Account

• Launch Quick View from the Dashboard or from the menu option under Account Information.



• An account can be selected from the drop-down option for Select Quick View Accounts by clicking in the search bar. Or begin typing the account number or name in the search bar to select the specific account.

Dashboard Account Information	Payments & Transfers	Fraud Mgn	nt Administratior	n My Settings	
Quick View Select Quick View Accounts Account Number / Name b Checking (MAY B DUNN) - Checking (WILL B ALLWRIGHT)	Account Type	Select Group Groups	oup Data reo	orted as of Feb 10, 2021 2:2	6 PM CST
Account Number	Current Ava	ilable	Current Ledger	Memo Available Balance	
Number of Accounts: 3	\$2	31.67	\$232.12	\$231.67	
CC Release Test Acct	:	\$66.67	\$67.12	\$66.67	*
MAY B DUNN	\$	101.07	\$101.07	\$101.07	**
WILL B ALLWRIGHT	:	\$63.93	\$63.93	\$63.93	() •
			Page	 indicates requi generated on 02/10/2021 at 2:2 	ired fields 6 PM CST

• Accounts can be viewed by account types by selected the type of account from the drop-down under Account Type.

Dashboard Account Information Payn	nents & Transfers	Fraud Mgmt	Administration	My Settings
Quick View				
Select Quick View Accounts Account Number / Name	Account Type	Select Group Groups)	
Checking	DEMANDDEPOSIT		Data reporte	d as of Feb 10, 2021 2:26 PM CST
Account Number	CD SAVINGS MONEYMARKET	ailable (urrent Ledger	Memo Available Balance
Number of Accounts: 3	\$2	231.67	\$232.12	\$231.67
CC Release Test Acct		\$66.67	\$67.12	\$66.67
MAY B DUNN	\$	101.07	\$101.07	\$101.07
WILL B ALLWRIGHT		\$63.93	\$63.93	\$63.93
			Page gen	 indicates required fields erated on 02/10/2021 at 2:26 PM CST

Account Groups

Create a Group

• Launch Quick View from the Dashboard or from the menu option under Account Information.

Dashboard	Account Information
Welcome	Quick View Balance Reporting Transaction Search

• Click on "Add Group" to create an Account Group.

Dashboard Account Information	Payments & Transfers	Fraud Mgmt	Administration	My Settings
Quick View Select Quick View Accounts Account Number / Name	Account Type	Select Group Groups	Click Her	e
Checking			Data reporte	ed as of Feb 10, 2021 2:12 PM CST
Account Number	Current Avai	lable (Current Ledger	Memo Available Balance
Number of Accounts: 3	\$2 3	31.67	\$232.12	\$231.67
CC Release Test Acct	\$	66.67	\$67.12	\$66.67
MAY B DUNN	\$1	01.07	\$101.07	\$101.07
WILL B ALLWRIGHT	\$	63.93	\$63.93	\$63.93
			Page gen	 indicates required fields ierated on 02/10/2021 at 2:12 PM CST

• Input the desired name for the Account Group. The Default box does not have to be checked unless you wish to have this Account Group set as your default. Click on the account type to expand the options. Click on Select Accounts to select which accounts should be a part of this group which will need to be completed for each account type.

NOTE: Any new accounts added to your access will need to be added to the Account Group to view it in your default list. This will apply for all Account Groups. If no Account Group is set as a Default, all new accounts will automatically be viewable on the Dashboard and QuickView but will still require you to add the account to the appropriate Account Group.

I	Dashboard	Account Information	Payments & Transfers	Fraud Mgmt	Administration	My Settings
	Create Acco 1 What name 2 Should this 3 What accounts Accounts No Items See Return	would you like to use for Group Name Test group be the default grou Is Default nts should be in this grou Reorder A Number dected.	this group? p for this service? p? <u>2</u> Name		Select Accounts	Click Here
					Page gen	 indicates required fields erated on 02/10/2021 at 2:17 PM CST

• A "Select Accounts" pop-up window will appear for you to check the box of which accounts. There is an option towards the bottom of the window to Select All Accounts. Click OK once your desired accounts have been selected.

Filter Accounts			
Display all accounts			
Display accounts entitled			
Display accounts not entitled			
Account Number			
Account Description			
Search Accounts			
- / - Account Number -	Type	Account Description	Bank
Prev 1 Next Go to page 1	Showing 1 - 3 of 3	1	Items to display: 5
	DEMANDDEPOSIT	CC Release Test Acct	Bridgewater Bank CERT (091017523)
0	DEMANDDEPOSIT	MAY B DUNN	Bridgewater Bank CERT (091017523)
8	DEMANDDEPOSIT	WILL B ALLWRIGHT	Bridgewater Bank CERT (091017523)
Prev 1 Next Go to page 1	Showing 1 - 3 of 3		Items to display: 5

• The accounts selected will appear under #3 and can be sorted. The Reorder button will allow you to drag and drop the account in the order you prefer to view them. The other options are for alphabetizing the accounts either by account Number or by account Name.



• Reorder option will have a pop-up window appear for you to begin dragging and dropping the accounts into the order you prefer. Click OK once you have completed your changes.

Reorder Accounts X
Checking (CC Release Test Acct) - Bridgeweter Bank CERT (091017523)
Ohecking (WILL B ALLWRIGHT) - Bridgewater Bank CERT (091017523)
Checking (MAY 8 DUNN) - Bridgewater Bank CERT (091017523)
2
OK Groef

- Click Save to create the Account Group.
- It will return you to the Account Groups page. Feel free to create additional groups if needed by clicking on the Create button. If no other groups are needed, click on Return to return to the QuickView page.

I	Dashboard	Account Information	Payments & Transfers	Fraud Mgmt	Administration	My Settings
•	Account G	iroups - Quick Vie Int Groups Group Name Is Default				
	Show 10 resu	(S per page, sorted by Group	o Name in ascending order			
l		Group Name +	Is Default			
l	(Prev 1 (Next)	Go to page 1 St	iowing 1 - 2 of 2			Items to display: 10 20 50
l	×	All	×	P	View 📔 Download	d) 🥜 Edit) [Clone
l	×	Test		P	View 📔 Download	d 🖉 Edit 🖺 Clone
l	Prev 1 Next	Go to page 1 Sh	owing 1 - 2 of 2			Items to display: 10 20 50
	Return					Results returned in 0.571 seconds
					Page gen	 indicates required fields erated on 02/19/2021 at 1:58 PM CST

A drop-down will appear now under Groups allowing you to toggle between your created group(s) and the blank option. The blank option will list all the accounts you have access to view.

Dashboard Account	t Information Payments	& Transfers	Fraud Mgmt	Administration	My Settings	
Quick View Select Quick View Accounts Account Number / Name	R	nt Type ¥	Select Group Groups Savings Test Test	Selec	ct Group	
Account Number		Current Ava	ilable	Current Ledger	Memo Available Balance	
Number of Accounts: 3	3	\$2	31.67	\$232.12	\$231.67	
CC Release Test Acct			\$66.67	\$67.12	\$66.67	
MAY B DUNN		\$	101.07	\$101.07	\$101.07	
WILL B ALLWRIGHT			\$63.93	\$63.93	\$63.93	
				Page gen	 indicates re erated on 02/10/2021 at 2 	quired fields 20 PM CST

Review, Edit & Delete a Group

• Expand the Account Information menu to select Account Groups or on the Quick View page, click on My Groups button.

Dashboard Account Information	Payments & Transfers Frau	d Mgmt Administratio	n My Settings	
Quick View Select Quick View Accounts Account Number / Name Second Participation Search (P All) Group: Test	Account Type Group	Group ps Odfault) Add Group	Click here	
Checking		Data re	oorted as of Feb 10, 2021	2:18 PM CST
Account Number	Current Available	Current Ledger	Memo Available Balance	
Number of Accounts: 2	¢165.00	+455.00	+455.00	
	\$165.00	\$165.00	\$165.00	
MAY B DUNN	\$101.07	\$101.07	\$101.07	*
MAY B DUNN WILL B ALLWRIGHT	\$105.00 \$101.07 \$63.93	\$165.00 \$101.07 \$63.93	\$105.00 \$101.07 \$63.93	** **

• From the Account Groups page, you will have the options to View, Download, Edit, and Clone a group.

I	Dashboard	Account Info	rmation Paymen	ts & Transfers	Fraud Mgmt	Administration	My Settings
	Account G	roups					
	Search Accou	nt Groups					
		Services All					
	(Is Default]				
	Show 10 result	ts per page, sorted	by Group Name in as	ending order			
	Search	📀 Create F	Print				
	Se	rvice	Group Name +	Is Default			
	Prev 1 Next	Go to page 1	Showing 1 - 3	of 3			Items to display: 10 20 50
	🔀 Qu	ick View	All		P	View 📔 Downloa	id 🖉 Edit 📄 Clone
	🔀 Qu	ick View	CC Release		P	View 📳 Downloa	id) 🖉 Edit) [Clone
	🔀 Qu	ick View	Test	×	P	View [陷 Downloa	id) 🥜 Edit) [Clone
	Prev 1 Next	Go to page 1	Showing 1 - 3	of 3			Items to display: 10 20 50

• *View*. Allows you to see the list of accounts that are included in the specific group.

V	/iew Account Group
I	1 What name would you like to use for this group? Group Name: Test
1	2 Should this group be the default group for this service? Is Default: Yes
4	Checking - MAY B DUNN
Ľ	- WILL B ALLWRIGHT
F	rint Download Close

• *Download*: Provides a PDF document of the accounts listed in the specific group.

Account G	roup Report	BRIDGEWATER BANK
Group Details		
Group Name Owner Service Is Default? Modified By Last Modified	Test Quick View Yes 02/22/2021 02:39:06 CST	
Group Accounts		
Checking (091017523) - DEM (091017523) - DEM	ANDDEPOSIT (MAY B DUNN) ANDDEPOSIT (WILL B ALLWRIGHT)	

• *Edit:* Allows you to edit the group name, default, account list, and sort options.



• *Clone*: Creates an exact copy of the group selected as a new group.



• Delete a group by clicking on the red "X" at the start of the group to be removed.

ľ	Dashboard	Account Info	rmation Payments 8	Transfers	Fraud Mgmt	Administration	My Settings
l	Account G	roups					
I	Search Accou	nt Groups					
		Services All Group Name Is Default 🗆					
I	Show 10 resul	ts per page, sorted	by Group Name in ascend	ing order			
	Search	🔕 Create 🔚	Print				
l	Clic	k here to Delete	Group Name *	Is Default			
I	Prev 1 Ner	Go to page 1	Showing 1 - 3 of 3				Items to display: 10 20 50
l	×~~	iick View	IIA		J	View 📔 Downloa	id 🥜 Edit [🛅 Clone
l	× 0.	lick View	CC Release			View 📔 Downloa	id) 🥜 Edit) [Clone
I	× 0.	lick View	Test	×	4	View 📔 Downloa	id) 🥜 Edit) [Clone
I	Prev 1 Next	Go to page 1	Showing 1 - 3 of 3				Items to display: 10 20 50
L							Results returned in 0.688 seconds

Account Transaction Report

 Transaction Reports for an account can be accessed quickly by expanding the gear icon to the right of the balances on QuickView and in the Account Center on the Dashboard. (

Dashboard Account Informatio	on Payments & T	ransfers Frau	d Mgmt Administra	ation My Settings
Quick View				
Select Quick View Accounts Account Number / Name Account Type	Q	Select Grou Test	: Group ps (Default) Add Group	ps]
Search 🔎 All				
Group: Test				
Checking			Dat	a reported as of Feb 23, 2021 4:40 PM C
Account Number		Current Available	Current Ledge	er Memo Available Balance
Number of Accounts: 2		\$200.22	\$200.2	2 \$200.22
MAY B DUNN		\$101.27	\$101.2	7 \$101.27 (***
WILL B ALLWRIGHT		\$98.95	\$98.9	5 <u>Search</u> <u>Transactions</u>
				* Transfer From
				Page generated on 02/1
ashboard Account Information Welcome to The Bridge	Payments & Tran	sfers Fraud M	gmt Administratio	n My S
Account Information Velcome to The Bridge Account Center	Payments & Tran	sfers Fraud M	igmt Administration	Page generated on 022
Account Information Welcome to The Bridge Account Center Group: Test	Payments & Tran	sfers Fraud M	gmt Administration	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking	Payments & Tran	sfers Fraud M	gmt Administration	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number	Payments & Tran Automatic Stranger Current Available	sfers Fraud M Data reported Current Ledger	gmt Administration as of Feb 23, 2021 4:56 PJ Memo Available Balance	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number Number of Accounts: 2	Payments & Tran Aurent Available \$200.22	Sfers Fraud M Data reported Current Ledger \$200.22	gmt Administration as of Feb 23, 2021 4:56 PI Memo Available Balance \$200.22	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number Number of Accounts: 2 MAY B DUNN	Payments & Tran Qurrent Available \$200.22 \$101.27	Sfers Fraud M Data reported Current Ledger \$200.22 \$101.27	gmt Administration as of Feb 23, 2021 4:56 PI Memo Available Balance \$200.22 \$101.27	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number Number of Accounts: 2 May B DUNN WILL B ALLWRIGHT	Payments & Tran Available \$200.22 \$101.27 98.95	Sfers Fraud M Data reported Current Ledger \$200.22 \$101.27 S98.95	gmt Administration as of Feb 23, 2021 4:56 Pf Memo Available Balance \$200.22 \$101.27 Sature Fanascloss	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number Number of Accounts: 2 May B DUNN WILL B ALLWRIGHT	Payments & Tran Available \$200.22 \$101.27 \$98.95	Sfers Fraud M Data reported Current Ledger \$200.22 \$101.27 \$98.95	gmt Administration as of Feb 23, 2021 4:56 PM Memo Available Balance \$200.22 \$101.27 @ Search Transactions Transactions Transactions	Page generated on 027
Account Information Welcome to The Bridge Account Center Group: Test Checking Account Number Number of Accounts: 2 May B DUIN WILL B ALLWRIGHT	Payments & Tran Available \$200.22 \$101.27 998.95	Sfers Fraud M Data reported Current Ledger \$200.22 \$101.27 \$98.95	gmt Administration as of Feb 23, 2021 4:56 Pf Memo Available Balance \$200.22 \$101.27 Saturation Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fanaschers Fa	

• It will open a PDF report in a pop-up window. It can be downloaded and printed from here.

