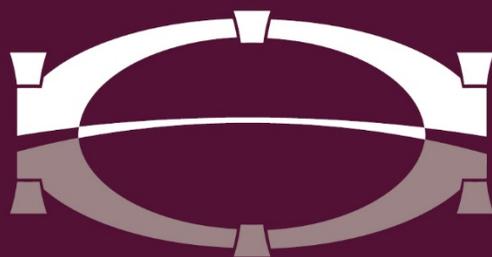


Quick View Search & Sort Guide

March 2021



BRIDGEWATER BANK

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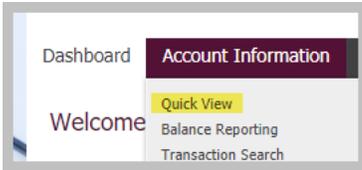
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Introduction

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.

A screenshot of the 'Quick View' interface. The 'Account Type' dropdown is set to 'Checking'. The search bar contains the letter 'b', and a dropdown menu shows two results: '- Checking (MAY B DUNN)' and '- Checking (WILL B ALLWRIGHT)'. Below the search results is a table with columns: Account Number, Current Available, Current Ledger, and Memo Available Balance. The table lists three accounts: CC Release Test Acct, MAY B DUNN, and WILL B ALLWRIGHT. A footer note states '* indicates required fields' and 'Page generated on 02/10/2021 at 2:26 PM CST'.

Account Number	Current Available	Current Ledger	Memo Available Balance
Number of Accounts: 3	\$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

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

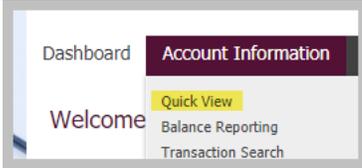
A screenshot of the 'Quick View' interface. The 'Account Type' dropdown menu is open, showing options: DEMANDEPOSIT, LOAN, CD, SAVINGS, and MONEYMARKET. The search bar contains the word 'Checking'. Below the search results is a table with columns: Account Number, Current Available, Current Ledger, and Memo Available Balance. The table lists three accounts: CC Release Test Acct, MAY B DUNN, and WILL B ALLWRIGHT. A footer note states '* indicates required fields' and 'Page generated on 02/10/2021 at 2:26 PM CST'.

Account Number	Current Available	Current Ledger	Memo Available Balance
Number of Accounts: 3	\$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

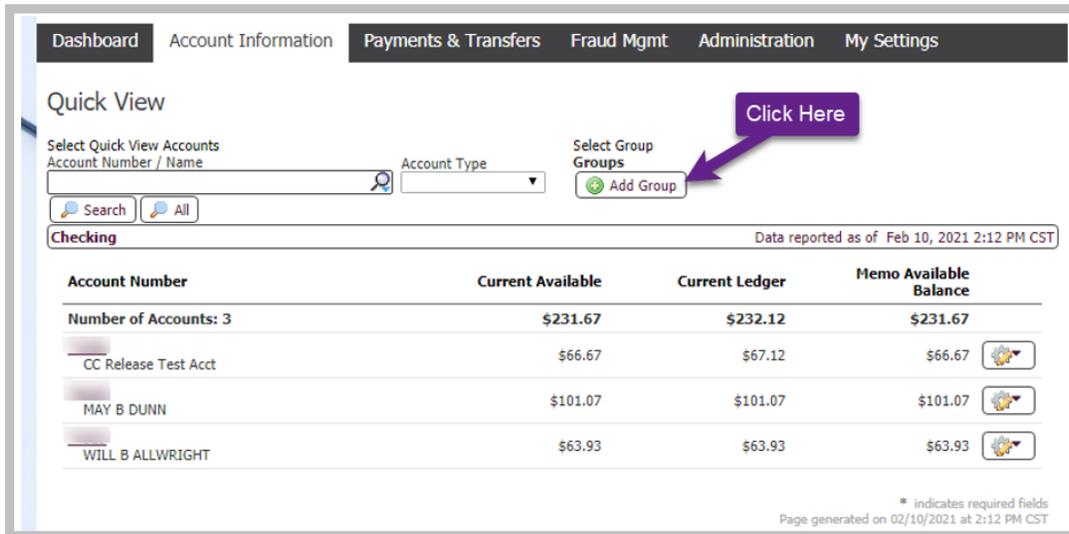
Account Groups

Create a Group

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



- Click on “Add Group” to create an Account Group.



- 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.

Dashboard Account Information **Payments & Transfers** Fraud Mgmt Administration My Settings

Create Account Group

- 1 What name would you like to use for this group?
Group Name
- 2 Should this group be the default group for this service?
Is Default
- 3 What accounts should be in this group?
 - ▼ Checking
 - Accounts
 - No Items Selected.

[Select Accounts](#) 

* indicates required fields
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- 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.

Select Accounts

Filter Accounts

Display all accounts

Display accounts entitled

Display accounts not entitled

Account Number

Account Description

+ / -	Account Number	Type	Account Description	Bank	
Prev	1	Next	Go to page 1	Showing 1 - 3 of 3	Items to display: 50
<input type="checkbox"/>		DEMANDDEPOSIT	CC Release Test Acct	Bridgewater Bank CERT (091017523)	
<input checked="" type="checkbox"/>		DEMANDDEPOSIT	MAY B DUNN	Bridgewater Bank CERT (091017523)	
<input checked="" type="checkbox"/>		DEMANDDEPOSIT	WILL B ALLWRIGHT	Bridgewater Bank CERT (091017523)	
Prev	1	Next	Go to page 1	Showing 1 - 3 of 3	Items to display: 50

Results returned in 0.024 seconds

- 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.

- 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.

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.

Quick View

Select Quick View Accounts
Account Number / Name

Account Type

Select Group
Groups

Savings Test
Test

Checking

Account Number	Current Available	Current Ledger	Memo Available Balance
Number of Accounts: 3	\$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

* Indicates required fields
Page generated on 02/10/2021 at 2:20 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.

The screenshot shows the 'Quick View' interface. At the top, there are navigation tabs: Dashboard, Account Information, Payments & Transfers, Fraud Mgmt, Administration, and My Settings. Below the tabs, there are search and filter options for 'Select Quick View Accounts' and 'Select Group Groups'. The 'My Groups' button is highlighted with a purple callout box containing the text 'Click here'. Below this, the 'Group: Test' is selected, and a table of account balances is displayed.

Account Number	Current Available	Current Ledger	Memo Available Balance
Number of Accounts: 2	\$165.00	\$165.00	\$165.00
MAY B DUNN	\$101.07	\$101.07	\$101.07
WILL B ALLWRIGHT	\$63.93	\$63.93	\$63.93

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

The screenshot shows the 'Account Groups' page. It includes a search bar for 'Search Account Groups' and a table listing the groups. The table has columns for 'Service', 'Group Name', and 'Is Default'. Each row has a set of action buttons: 'View', 'Download', 'Edit', and 'Clone'. The 'Test' group is marked as the default group.

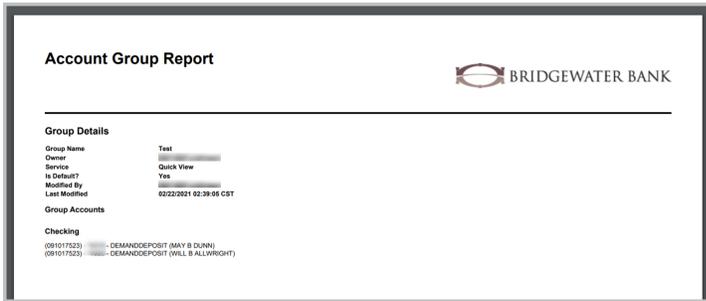
Service	Group Name	Is Default
Quick View	All	
Quick View	CC Release	
Quick View	Test	✓

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

The screenshot shows the 'View Account Group' dialog box. It contains two questions: 'What name would you like to use for this group?' and 'Should this group be the default group for this service?'. Below the questions, a list of accounts is shown under the 'Checking' category.

Checking
MAY B DUNN
WILL B ALLWRIGHT

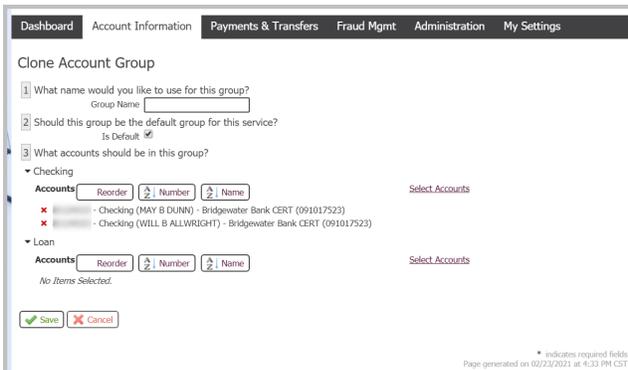
- **Download:** Provides a PDF document of the accounts listed in the specific group.



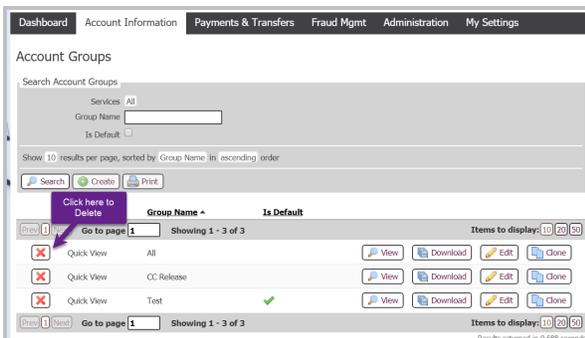
- **Edit:** Allows you to edit the group name, default, account list, and sort options.



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

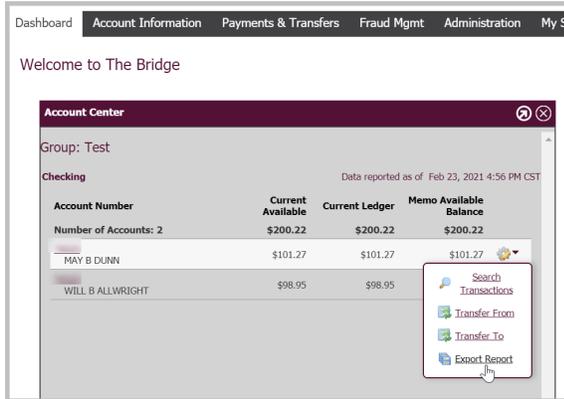
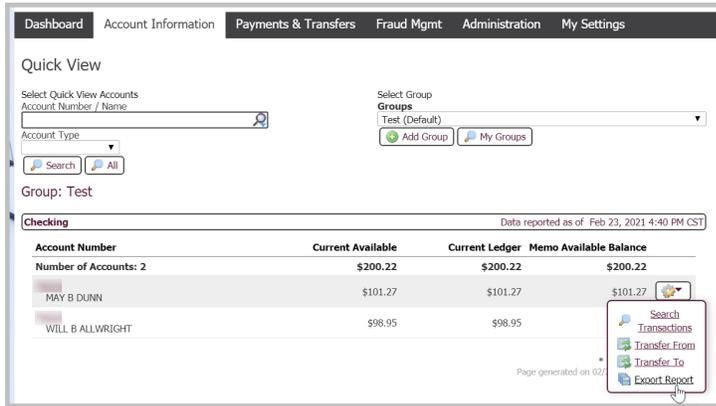


- Delete a group by clicking on the red "X" at the start of the group to be removed.



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. ()



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

