Quick View Search & Sort Guide

March 2021

BRIDGEWATER BANK

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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.

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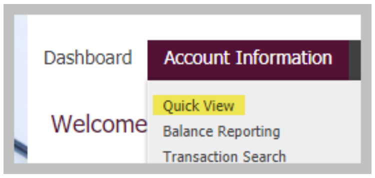
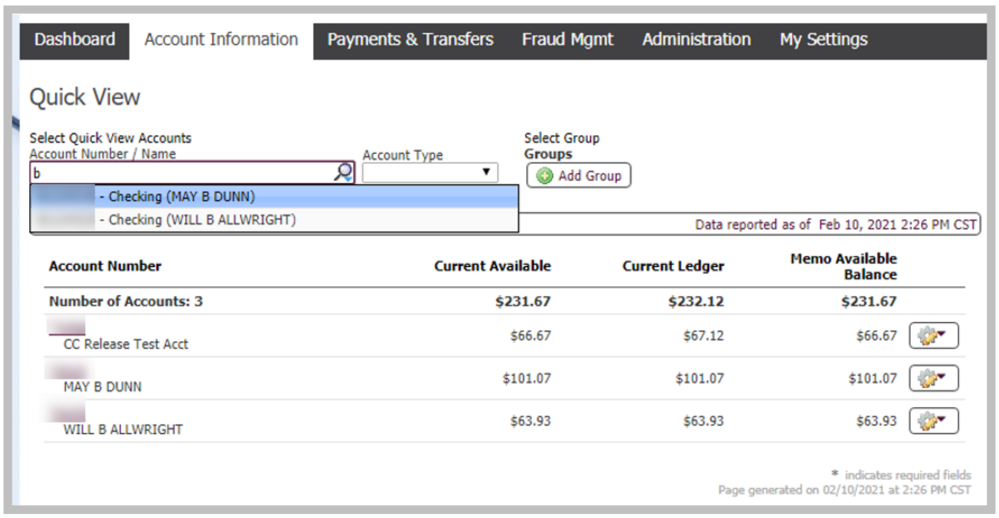
Search Account

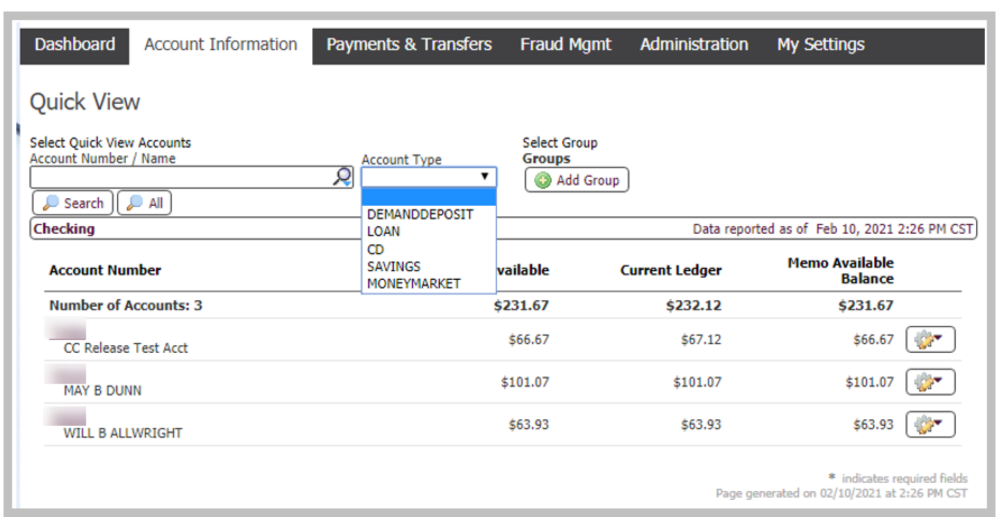
- Launch Quick View from the Dashboard or from the menu option under Account Information.



- 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.



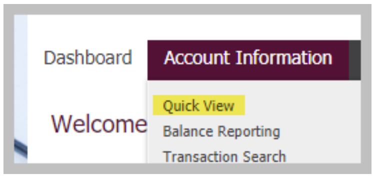
- Accounts can be viewed by account types by selected the type of account from the drop-down under Account Type.



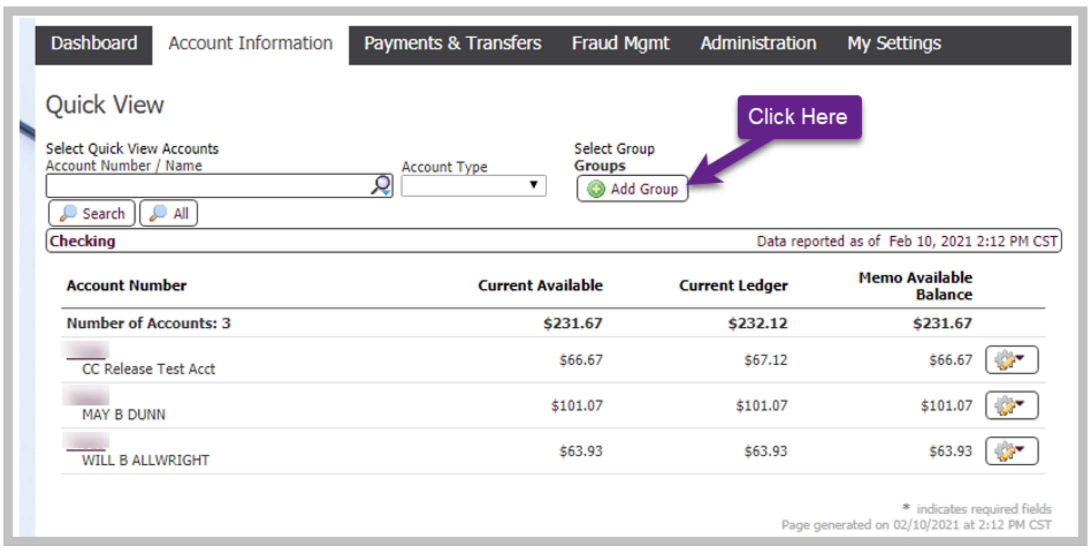
Account Groups

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.

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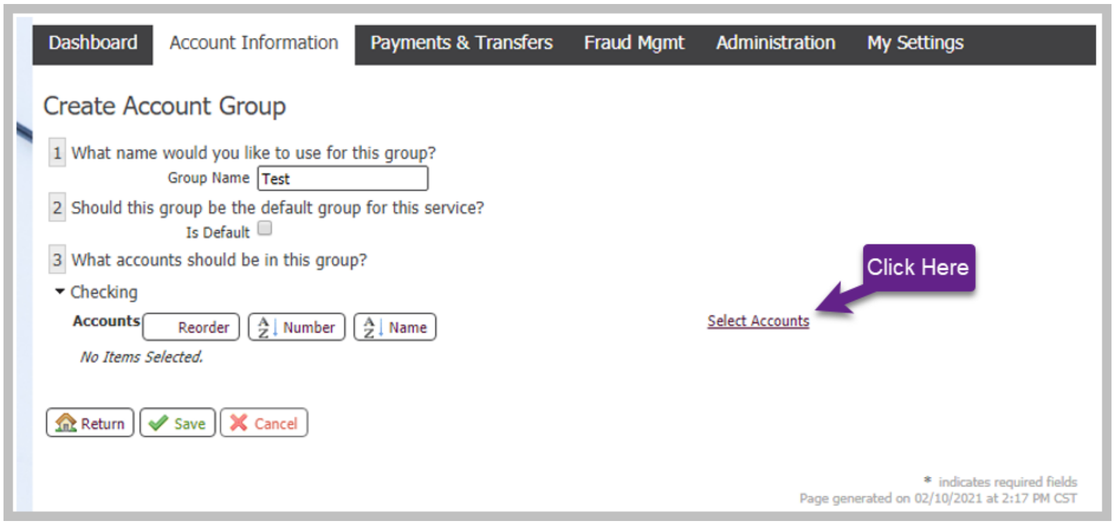
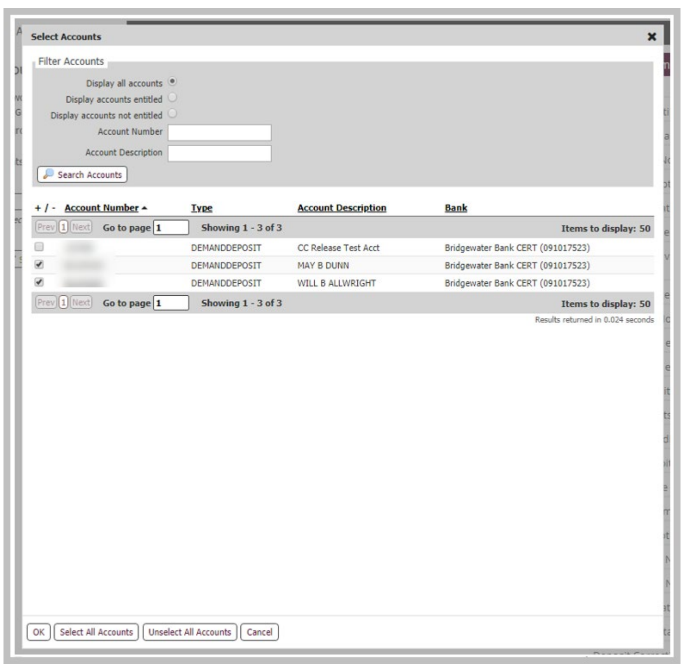


- A “Select Accounts” pop-up window will appear for you to check the box of which accounts. There is an option towards the bottom of the window to Select All Accounts. Click OK once your desired accounts have been selected.



- 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.

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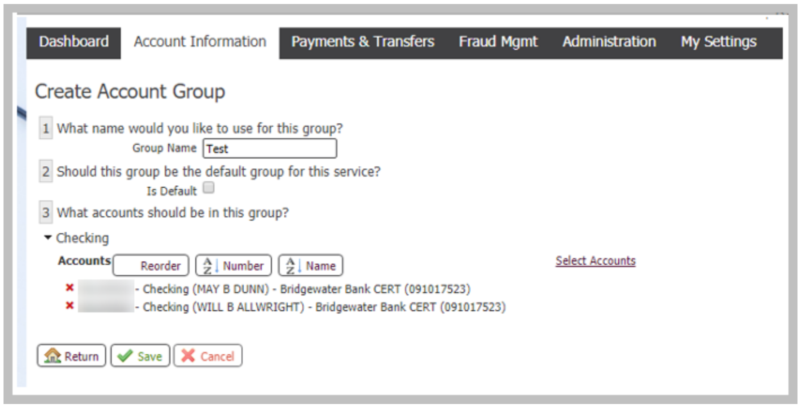
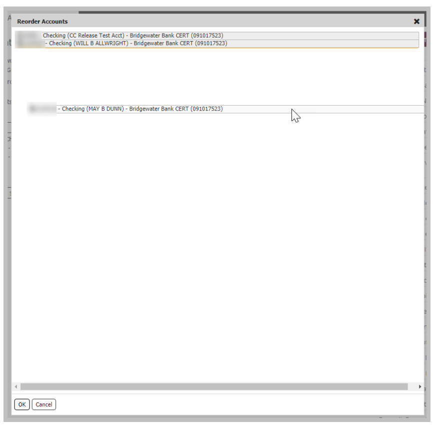
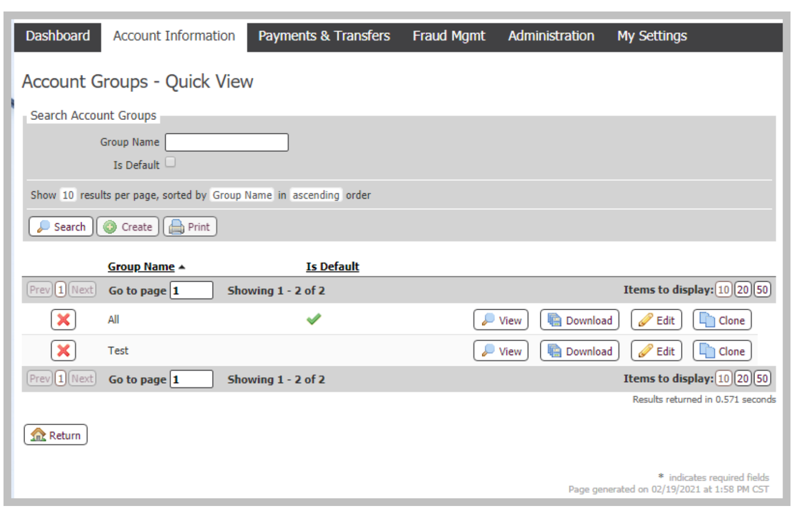


- Reorder option will have a pop-up window appear for you to begin dragging and dropping the accounts into the order you prefer. Click OK once you have completed your changes.



- 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.



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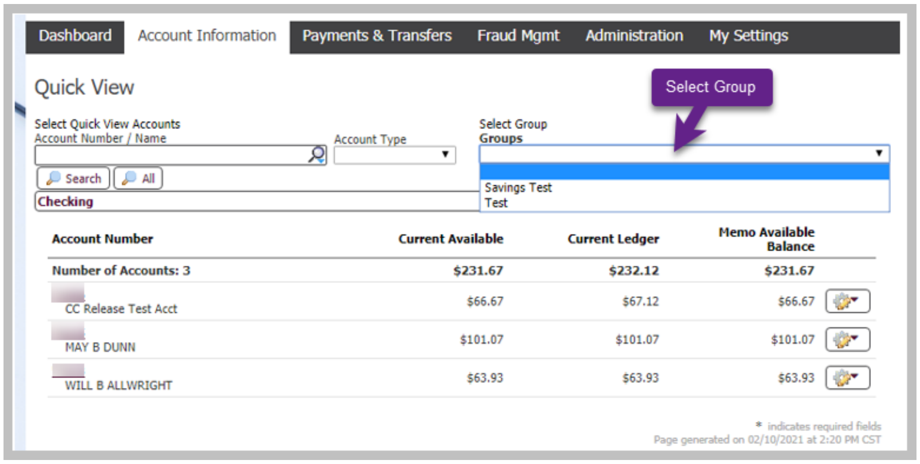
A drop-down will appear now under Groups allowing you to toggle between your created group(s) and the blank option. The blank option will list all the accounts you have access to view.



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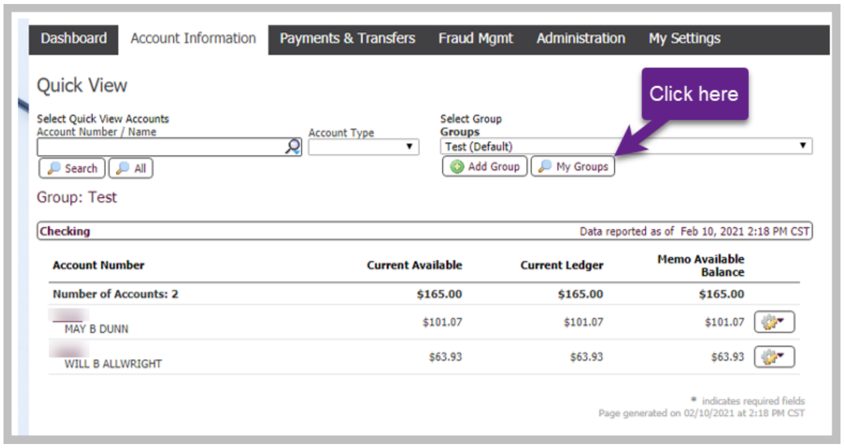
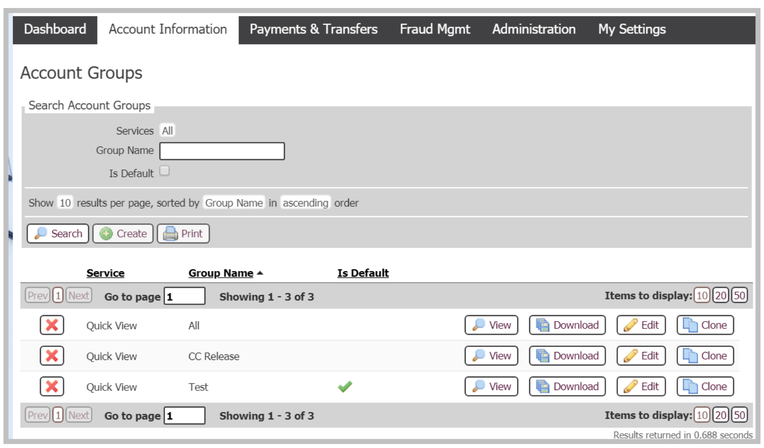
Review, Edit & Delete a Group

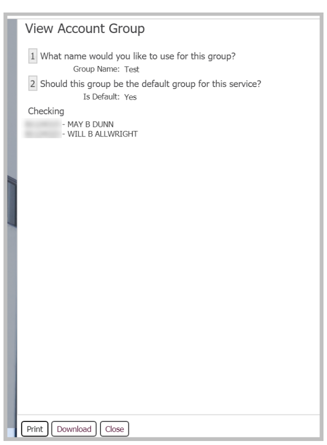
- Expand the Account Information menu to select Account Groups or on the Quick View page, click on My Groups button.



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



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



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


Account Group Report

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Group Details

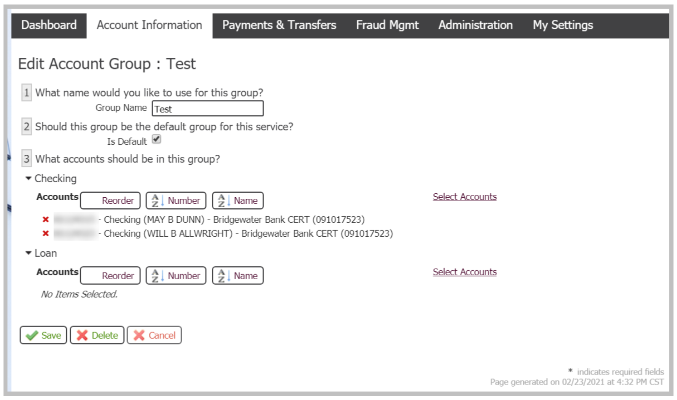
Group Name	Test
Owner	
Service	Quick View
Is Default?	Yes
Modified By	
Last Modified	02/22/2021 02:39:05 CST

Group Accounts

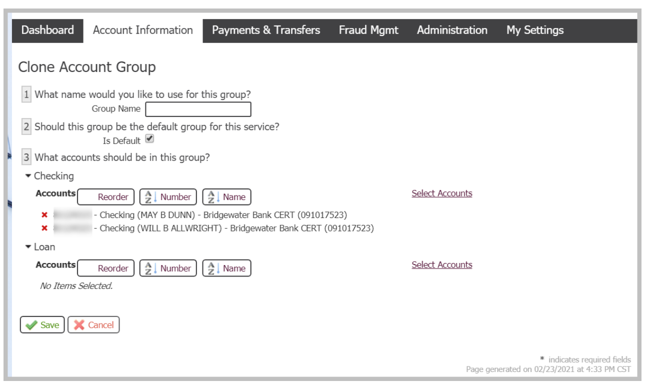
Checking

(091017523) - DEMANDDEPOSIT (MAY B DUNN)
(091017523) - DEMANDDEPOSIT (WILL B ALLWRIGHT)

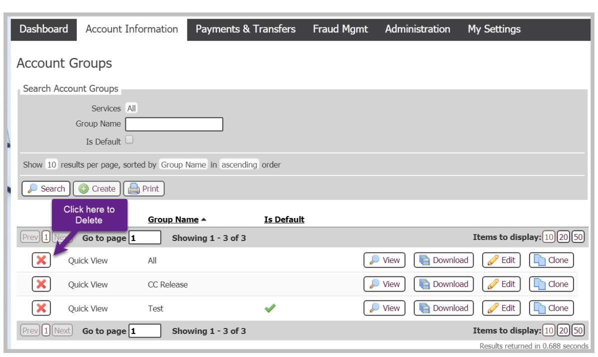
- *Edit:* Allows you to edit the group name, default, account list, and sort options.



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

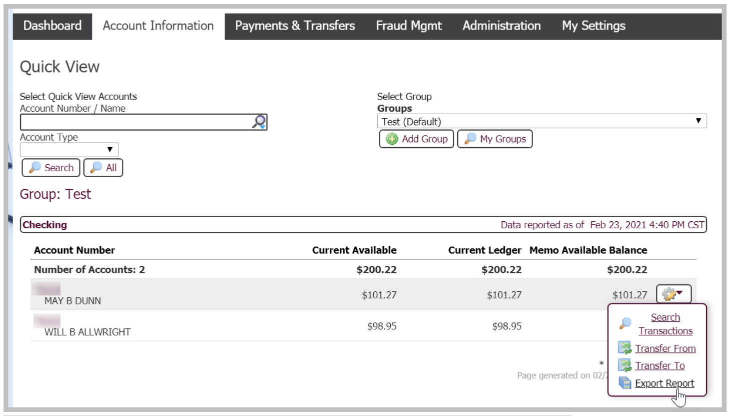


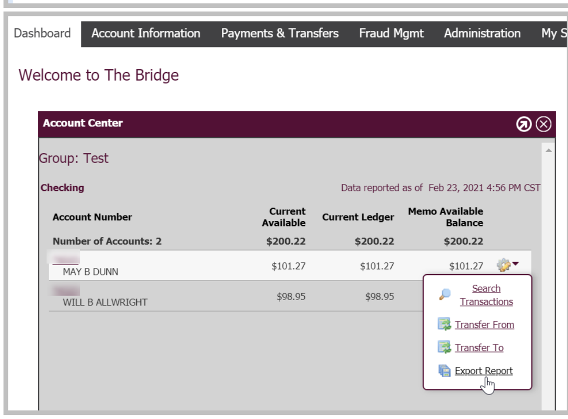
- Delete a group by clicking on the red "X" at the start of the group to be removed.



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.