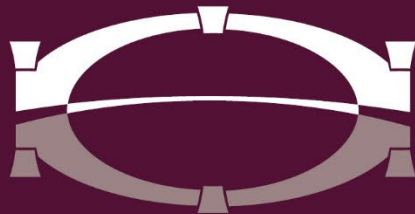


Quick View Search & Sort Guide

July 2022



BRIDGEWATER BANK

Table of Contents

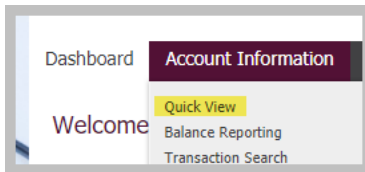
Introduction	3
Search Account	4
Account Groups	5
Create a Group	5
Review, Edit & Delete a Group	9
Account Transaction Report	11

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 'Select Quick View Accounts' search bar contains the letter 'b'. A dropdown menu shows two options: '- Checking (MAY B DUNN)' and '- Checking (WILL B ALLWRIGHT)'. The 'Account Type' dropdown is set to 'Checking'. The table below shows account details.

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

Data reported as of Feb 10, 2021 2:26 PM CST

* indicates required fields
Page generated on 02/10/2021 at 2:26 PM CST

- 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: 'DEMANDDEPOSIT', 'LOAN', 'CD', 'SAVINGS', and 'MONEYMARKET'. The 'Checking' option is selected in the search bar. The table below shows account details.

Account Number	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

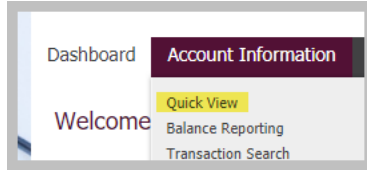
Data reported as of Feb 10, 2021 2:26 PM CST

* indicates required fields
Page generated 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.



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

A screenshot of the 'Quick View' page in a web application. The page has a dark navigation bar with links: 'Dashboard', 'Account Information', 'Payments & Transfers', 'Fraud Mgmt', 'Administration', and 'My Settings'. Below the navigation bar, there's a 'Quick View' section with a search bar for 'Account Number / Name', an 'Account Type' dropdown, and a 'Select Group Groups' section containing an 'Add Group' button. A purple arrow points to the 'Add Group' button with the text 'Click Here'. Below the search bar, there's a 'Checking' section with a table of accounts. The table has columns: 'Account Number', 'Current Available', 'Current Ledger', and 'Memo Available Balance'. The table shows 3 accounts: 'CC Release Test Acct', 'MAY B DUNN', and 'WILL B ALLWRIGHT'. At the bottom right, there's a footer with a note: '* indicates required fields' and 'Page generated 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.

Dashboard
Account Information
Payments & Transfers
Fraud Mgmt
Administration
My Settings

Create Account Group

- What name would you like to use for this group?
Group Name
- Should this group be the default group for this service?
Is Default ☐
- What accounts should be in this group?

Checking

Accounts
Reorder
Number
Name

No Items Selected.

Return
Save
Cancel

[Select Accounts](#)

Click Here

* indicates required fields
Page generated 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
Pres	1	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)
Pres	1	Go to page	1	Showing 1 - 3 of 3
				Items to display: 50
				Results returned in 0.024 seconds

OK
Select All Accounts
Unselect All Accounts
Cancel

- 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.

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

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 Fraud Mgmt Administration My Settings

Quick View

Select Quick View Accounts
Account Number / Name

Account Type

Select Group Groups
Test (Default)

Add Group My Groups

Group: Test

Checking Data reported as of Feb 10, 2021 2:18 PM CST

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

* Indicates required fields
Page generated on 02/10/2021 at 2:18 PM CST

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

Dashboard Account Information Payments & Transfers Fraud Mgmt Administration My Settings

Account Groups

Search Account Groups

Services All

Group Name

Is Default

Show 10 results per page, sorted by Group Name in ascending order

Search Create Print

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

Prev 1 Next Go to page 1 Showing 1 - 3 of 3 Items to display: 10 20 50

View Download Edit Clone

Results returned in 0.688 seconds

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

View Account Group

1 What name would you like to use for this group?
Group Name: Test

2 Should this group be the default group for this service?
Is Default: Yes

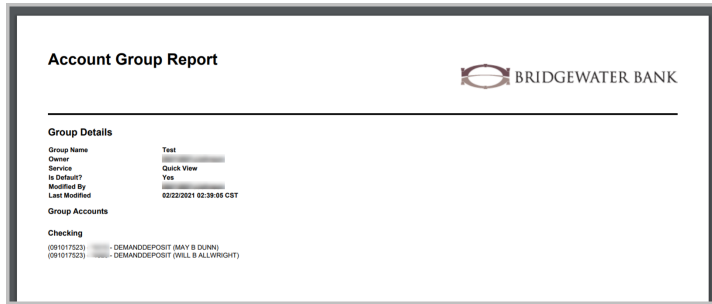
Checking

MAY B DUNN

WILL B ALLWRIGHT

Print Download Close

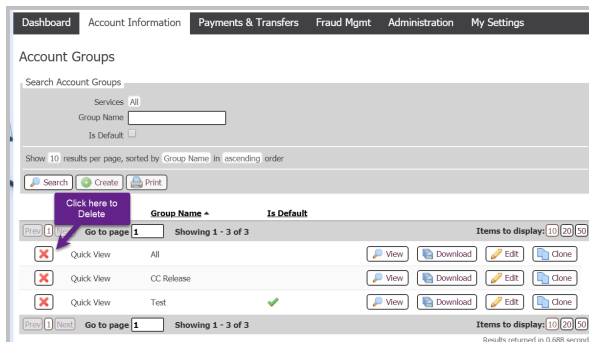
- **Download:** Provides a PDF document of the accounts listed in the specific group.




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

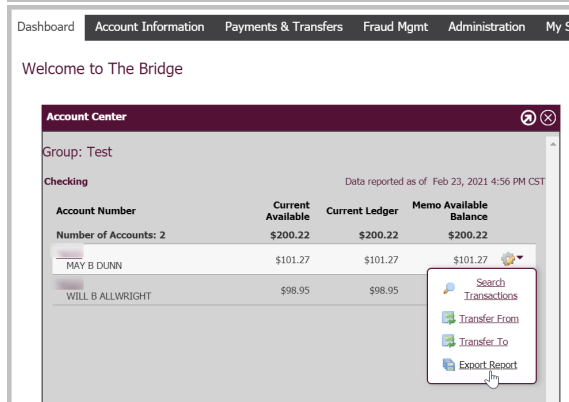
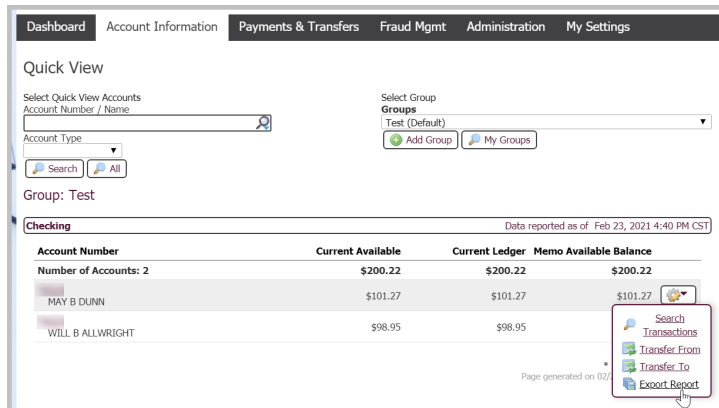
- **Clone:** Creates an exact copy of the group selected as a new group.

- **Delete:** 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.

Print Report

Transaction Report

BRIDGEWATER BANK

Transaction Report for account

Reported on Wed Apr 06 21:35:00 GMT 2022

Current Available Balance \$78.98
Current Ledger Balance \$78.98
Memo Available Balance \$78.98
Total Sweep Relationship Balance \$78.98

Date	Description	Credit	Debit	Running Balance
03/30/2022	Book Transfer Credit 700391567 ONLINE BANKING TRANSFER FROM ON 3/30/22 AT 6:00	1.02		
03/29/2022	Book Transfer Debit 700203449 ONLINE BANKING TRANSFER TO ON 3/29/22 AT 6:00		1.03	
03/29/2022	Book Transfer Debit 700203450 ONLINE BANKING TRANSFER TO ON 3/29/22 AT 6:00		1.02	
03/17/2022	ACH Debit Received BWB BCP TEST ACH BC Tes		1.00	