

The My Accounts widget on the My Accounts home page is universally important to all businesses. Deposit and loan accounts are available for reconciliation, research, and reporting purposes.

**My Accounts:** filtered list of Deposit and Loan accounts. View balances; hover over an account for a "quick peek"; select an account to view details.

My Accounts | Move Money | Additional Services | Reports

Accounts Transfer

Tax ID Classy Catering

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**DEPOSIT ACCOUNTS** \$14,298.82

Operating Checking \*0001 Quick peek

Current \$21,835.13

Available \*\*\$21,835.13

Payroll \*0026 Quick peek

Current -\$249.17

Available \*\*-\$249.17

Savings \*0002 Quick peek

Current -\$7,287.14

Available \*\*-\$7,287.14

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**LOAN ACCOUNTS** \$2,392,611.82

\*\*This balance may include overdraft or line of credit funds.

The selected TIN determines the Deposit and Loan accounts that display.  
 OR select **View All Tax IDs** to see all deposit/loan accounts together.

Accounts Transfer

Tax ID View All Tax IDs

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**DEPOSIT ACCOUNTS** \$317,532.40

**+ CLASSY CATERING** \$34,298.82

**+ CLASSY EVENTS** \$283,233.58

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**LOAN ACCOUNTS** \$2,578,496.83

\*\*This balance may include overdraft or line of credit funds.

**Tips:**

- Business Admins can see all TINs and all accounts within each TIN.
- Business Admins can set up business users with access to all accounts, or narrow by TIN and account.

**Account Details**

1. Jump to another TIN.
2. Jump to another account.
3. **Transfer** money (internal), **Export** transactions (formats below), **Print** the page
  - a. CSV – format for downloading into a spreadsheet
  - b. OFX – format that’s accepted for importing to Quicken and QuickBooks
  - c. QFX – Web Connect for Quicken
  - d. QBO – Web Connect for QuickBooks
4. Change the date range
5. Search for a transaction – good for research purposes

The screenshot shows the 'Account History' interface. Callout 1 points to the 'Classy Catering' dropdown menu. Callout 2 points to the 'Operating Checking 9999- \*0001' dropdown menu. Callout 3 points to the 'Transfer', 'Export', and 'Print' buttons. Callout 4 points to the date range selector showing 'Feb 17, 2019 - Mar 18, 2019 30 days'. Callout 5 points to the search box containing 'e.g. AT&T, check, 5.00'. The page also displays account balances: Current \$21,835.13 and Available\*\* \$21,835.13. A table header is visible with columns for Date, Description, Amount, and Balance. A message at the bottom states 'There are no transactions within this date range.' A calculator is visible on the right side of the page.