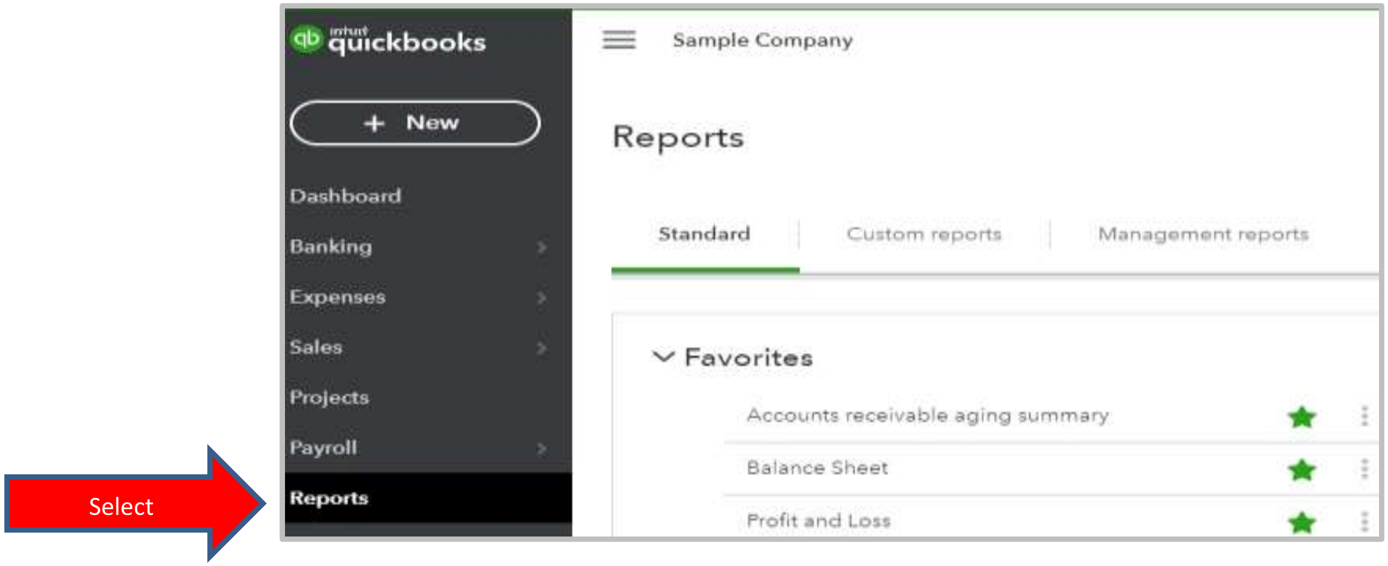
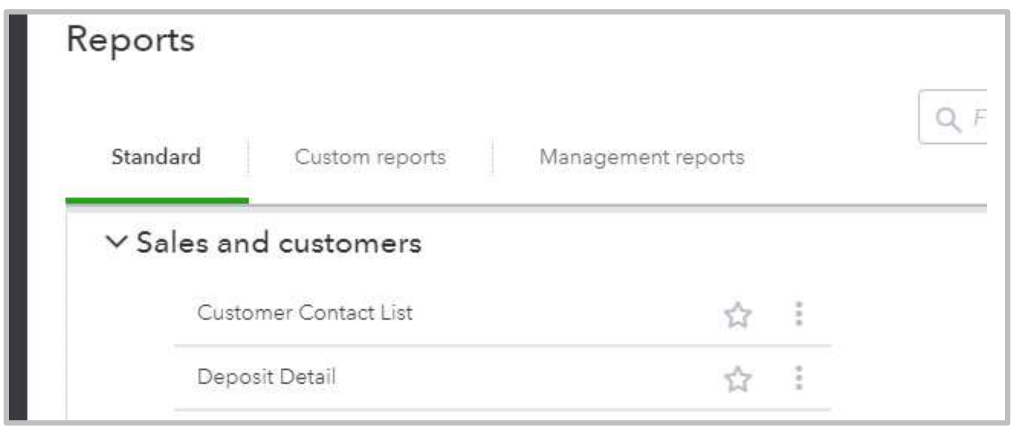
Customize Group Reports

Click on 'Reports' and scroll to find the report to create.



In this example we are using the 'Deposit Detail'

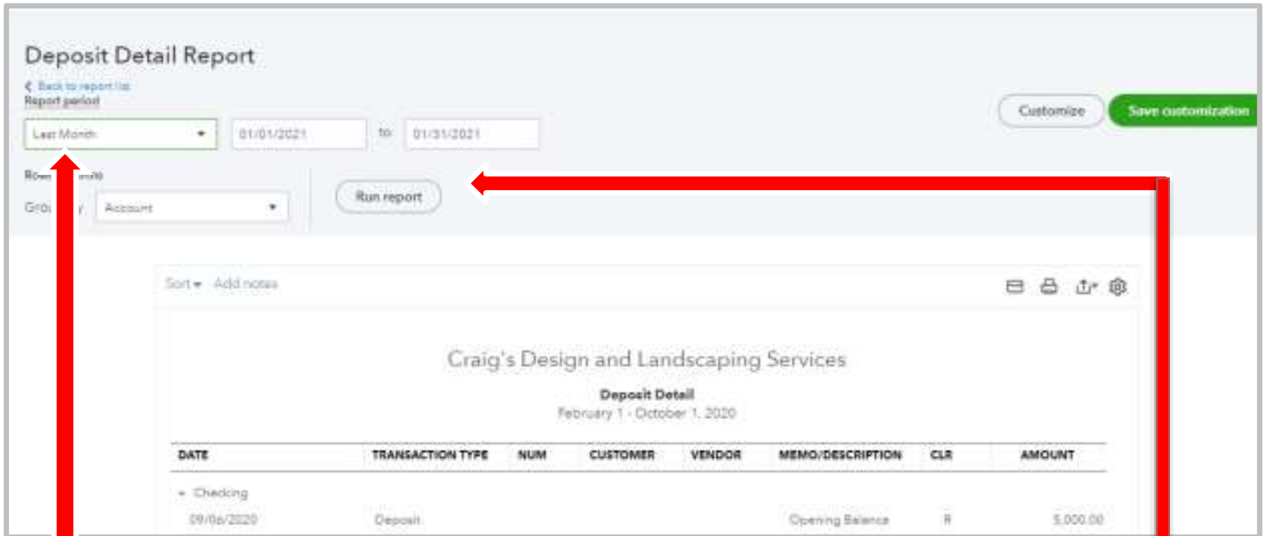


Clicking the Star, the report will be held in your 'Favorites' (see first example)

The three dots will take you directly to 'Customize' but it is best just to open the report.

Double click the report name to open. Scroll to the top to edit.

Customize Group Reports

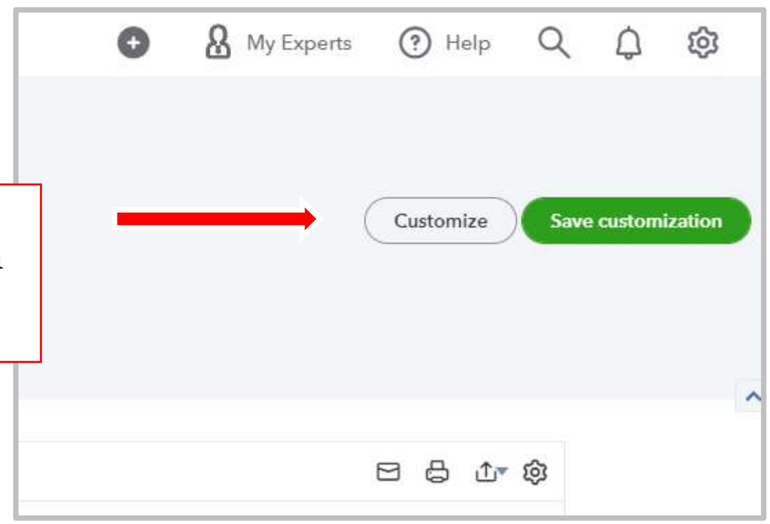


We will create a Deposit Detail for the Audit meeting.

Change the reporting period to "Last Month" Then click '**Run report'**.

The more columns on the report, the smaller the print.

You can customize the columns and details by clicking the 'Customize' icon in the top right corner.



The customization details offer many possible changes.

Customize Group Reports

Click on 'Rows/Columns' to add or delete.

By unchecking the boxes, columns are deleted.

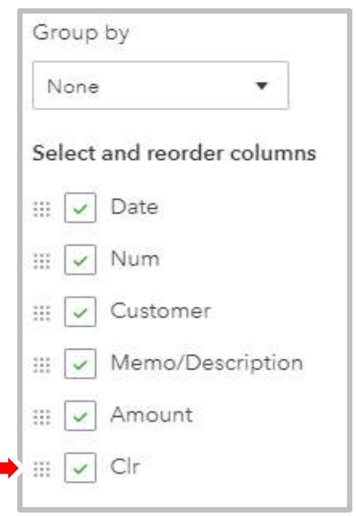
Uncheck 'Vendor' and 'Transaction type'

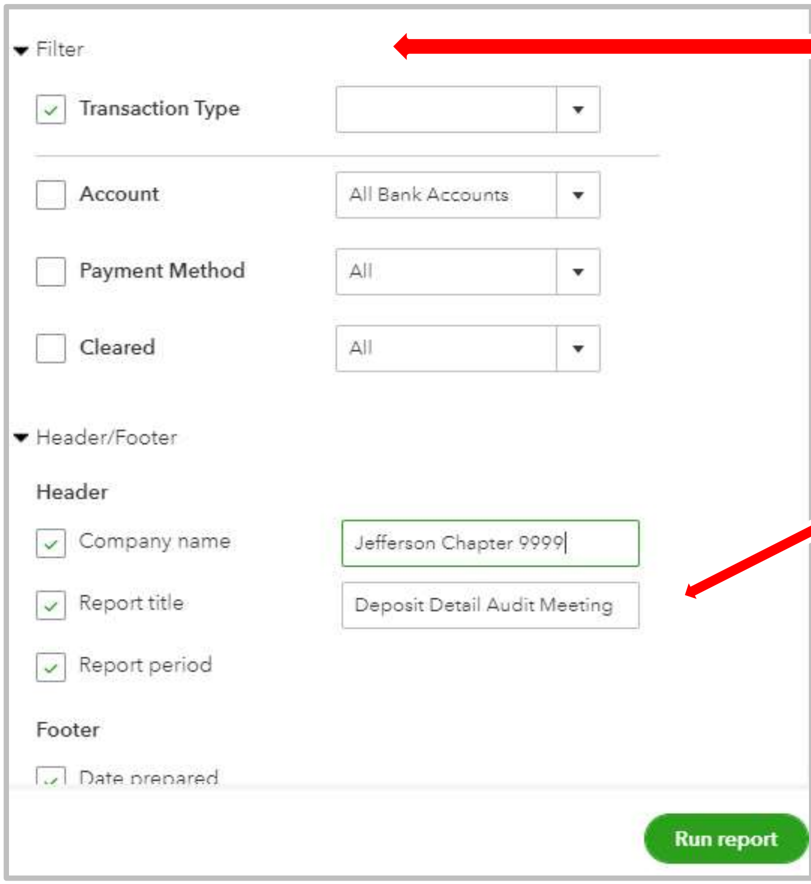
The 'Clr' column (cleared/reconciled) is very narrow and should be moved to the end after 'Amount' in order to free up space.

Notice how the unchecked items drop to the unused section.

This is done by hovering over the small dots on the left to form a four-way arrow.

Then drag the item down to the end.





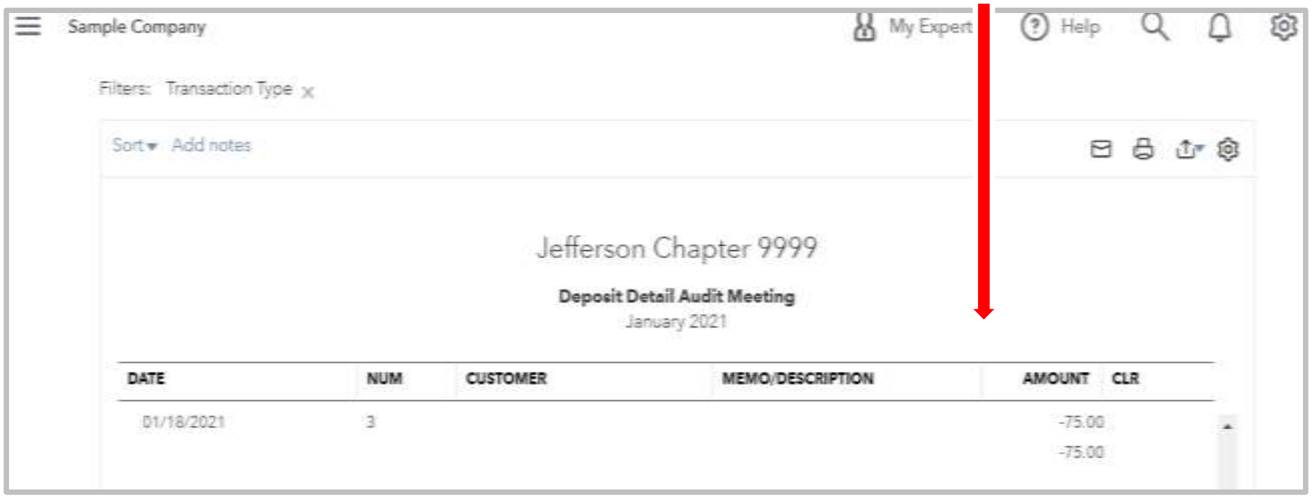
No changes need to be made to the Filters.

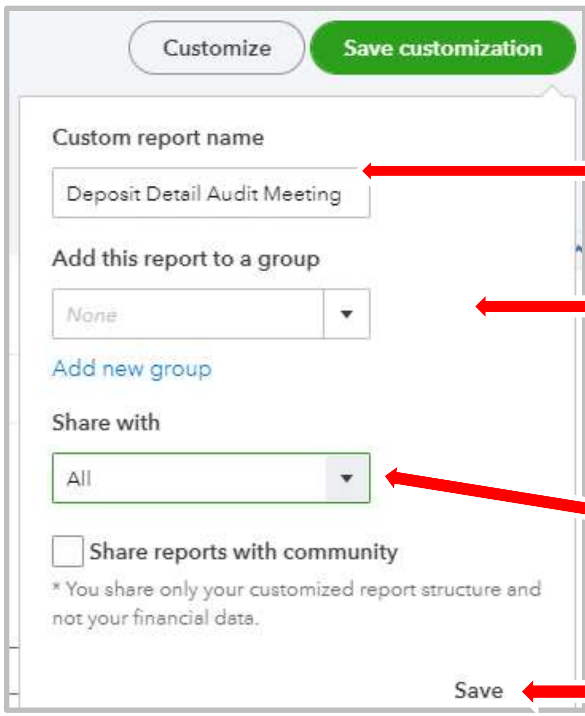
Headers & Footers can be changed to reflect the meeting information

Click 'Run Report'

Customize Group Reports

Columns can be enlarged, but not made narrower. Drag the line after the column title to the right.





Scroll up to see the Customize.

Click 'Save Customization'

The drop down allows you to change the name of the report, add the report to a group or Share with others.

If you already have groups, they will appear in the drop down. Otherwise type the new group name in the box.

You must select 'Share with ALL' in order for others to see your report.

Lastly, click the 'Save' button.

Customize Group Reports

Next time you need the report it can be found in the 'Custom Reports', formerly memorized reports.