



Greylock Digital Banking

Business User Guide



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Business Banking Overview

Our new Business Banking platform is focused on providing a digital banking experience to seamlessly review, monitor and manage finances of your business. Businesses have unique online banking requirements that are not available in retail banking, such as: multiple users with specific roles, Business ACH and Business Wires, Transaction limits and Authentication.

Business Administration Menu

The Business Admin menu provides you with the tools to set up, maintain, and manage the various aspects of your digital banking experience. It is the foundation for all other Business menus, such as Business ACH, Business Wires, and Business Reports. The Business Admin menu also serves as the hub for Authorizations, Payees, and User Management.

The screenshot displays the Business Admin interface. At the top, a navigation bar includes links for Dashboard, Accounts, Financial Planning, Transfer & Pay, Tools, and Business Banking (which is highlighted). Below this, the main content area is titled "Business Admin" and has sub-tabs for Authorizations, Payees, and Users. A dropdown menu is open, showing options: Business Banking, BusinessAdmin, BusinessWires, BusinessACH, and BusinessReports. Below the dropdown, the "Authorization Requests" section is visible. It features a left-hand sidebar with categories: ACH, External Transfers, Internal Transfers, and Wires. The main area contains a "Sort By: Date" dropdown and up/down arrow buttons. Below this is a table header with columns: DATE, ACCOUNTS, AMOUNT, and STATUS. A shaded bar labeled "PENDING REQUESTS" is present, and the text below it states: "You have no pending ACH authorization requests."



Users

From the Users tab, you can view your business account users, the number of their accounts, and the types of payments utilized. From this tab, you can also control and assign user permissions. Assigning the permissions will control what users can view, change, navigate, and execute within the system. Users must have permissions defined to access business-specific services. You can assign permissions and limits at the same time when creating a sub user.

Barney Blue

Summary | General Permissions | Payment Permissions | Account Access

Personal Information

Username: BarneyBlue ACTIVE Last Log In: October 25, 2023

Email: beth.abels@alkami.com Address: No address

Primary Phone Number: (972) 979-2021 Secondary Phone Number: No phone number

Account Access Manage Accounts

ACH Accounts: 2 Accounts Deposit Accounts: 4 Accounts

General Permissions Manage Permissions **Payment Permissions** Manage Permissions

Administration: Manage Payment Company · Edit Business Contact Information ACH Collections: Submit

After clicking on a user in the Users tab, you will see a summary of their accounts and permissions. To manage any users' permissions and accounts, you can do so by clicking on **Manage Accounts** or **Manage Permissions** from the summary page or by clicking any of the tabs at the top. You can also assign a new sub-user from the Users tab and assign permissions and limits at that time.

General Permissions, Payment Permissions, Account Access

From these tabs you can edit any existing user's permissions and account access. You will select the **Manage Permissions** button next to the area you wish to update. From there a drawer will open with the areas of the



page to update. You will update by turning the toggles on or off. For limits under the **Payment Permissions** tab, you will enter in the limits as well as adjusting the toggles if needed.

Barney Blue

Summary General Permissions Payment Permissions Account Access

Administration

Manage Users
Add, edit, and delete business users to access banking features and accounts. Users with this permission may also add and edit transaction limits.

Edit Business Contact Information
User is able to edit the contact info. ✓

Feature Access

Manage Cards
Ability to view and update debit/credit cards associated with a user.

View eDocuments
View statements, notices, tax forms, and annual credit card summary.

External Account Aggregation
Allows a sub user to aggregate external accounts to view balances and transactions.

Manage Permissions

Administration

Select All

Manage Users

Add, edit, and delete business users to access banking features and accounts. Users with this permission may also add and edit transaction limits.



Manage Payment Company

Allows a business user to add, edit, or delete a payment company.



Edit Business Contact Information

User is able to edit the contact info.



Save

Cancel



Limits

Limits can be assigned with permissions at the same time when creating a new sub user.

Limit	Description
Authorized limit	The maximum cumulative dollar amount that can be submitted without additional authorization. A limit of "0.00" means that ANY transaction scheduled by users with this role will require approval.
Max limit	The maximum cumulative dollar amount that can be submitted.
Can Authorize	The maximum cumulative dollar amount that a user with authorization rights can approve.

To assign limits to a user, in the Business Admin menu, you will select the user and click on the **Payment Permissions** tab. After clicking the **Manage Permissions** button you can edit the limits on that user.

ACH Payments

Allows user to request limit increases when submitting ACH Payment transactions that exceed the limits set for the overall business relationship by the financial institution.

Limits

Submit Up to
The maximum limits this user will be able to submit

Daily \$1,600.00
 Weekly \$7,000.00
 Monthly \$10,000.00

Dual Authorization Above
Require approval on all submissions above a specified amount

Daily \$20.00
 Weekly \$50.00
 Monthly \$1,000.00

Authorize Up to
The maximum limit this user will be able to authorize

Daily \$100.00
 Weekly \$500.00
 Monthly \$1,000.00

Save

Cancel

Create a User

The Master Users (indicated with the crown on the profile) will be able to create new users for the accounts (indicated with a briefcase). Please note, you will need to login from a desktop to add, edit or delete users. On the **Users** tab within the Business Admin menu, click the **plus sign (+)** to add a user. The add a new user drawer will open. Select if you are adding a **New User** or if you would like to **Copy a User**. Then select **Next**.

Dashboard Accounts Financial Planning Transfer & Pay Tools **Business Banking**

Business Admin

Authorizations Payees **Users**

All Users 1 2

USER	ACCOUNTS	PAYMENT TYPES
Annie Admin	6	ACH Collections, ACH Payments, Wires
Anna Morales	4	ACH Collections, ACH Payments, Wires
Barney Blue	6	ACH Collections, ACH Payments, Wires, Internal Transfers
david drone	6	ACH Collections, ACH Payments, Wires, Internal Transfers
John Wayne	4	ACH Collections, ACH Payments, Wires

Create New User

Select Type of User

Step 1 of 6

- New User
I want to create a brand new user.
- Copy A User
Copy permissions and accounts from an existing user.

Next 3 Cancel

Create New User 1

Personal Information

First Name
Jane 4 / 50

Last Name
Doe 3 / 50

Email
jane.doe@fakeemail.com 22 / 70

Primary Phone Number (Optional)
8584651234

Secondary Phone Number (Optional)

Office Phone Number (Optional)

Username

Username
jane.doe Username available

Next
Back

Create New User 2

Permissions and Limits

Step 3 of 6

Administration **Select All**

Manage Users
Add, edit, and delete business users to access banking features and accounts. Users with this permission may also add and edit transaction limits.

Manage Payment Company
Allows a business user to add, edit, or delete a payment company.

Edit Business Contact Information
User is able to edit the contact info.

Feature Access **Select All**

Manage Cards
Ability to view and update debit/credit cards associated with a user.

Next
Back

Create New User 3

Accounts

Step 4 of 6

You have added 1 accounts to Jane.

Add/Remove Accounts

ACH Accounts

- External BofA ****5422

Next
Back

Create New User 4

Account Permissions

Step 5 of 6

These will be applied to all eligible accounts within each account type. You can change the permissions individually in the User Details section after creation.

ACH Accounts (1 of 2) **Select All**

Transfer Funds Out From
The ability to transfer funds out from this account and view associated transfer history using the Transfers widget.

Transfer Funds Into
The ability to transfer funds into this account and view associated transfer history using the Transfers widget.

Next
Back

1. You will enter the basic information for that user and select a username. The system will tell you if that username is available.
2. Next you will select the permissions and limits for the user you have created.
3. You will then add the accounts that you would like to be associated with the new user.
4. Lastly, you will assign account permissions and then review the information for your new user.
5. When you are finished, you will click **Submit**.



Sub-User Status

A master user can edit a sub user's contact information (name, email, phone, and address) and role by clicking the pencil icon next to *Contact Info* section. Additionally, a master user, or a sub user with the Manage Users and Roles permission, can edit a sub user's status or reset a sub user's password.

- **Active** - Sub users in an Active status are able to log in and access online banking. If a sub user is Active, a master user can change the sub user's status to Frozen.
- **Locked** - Sub users in a Locked status have locked themselves out of online banking due to excessive unsuccessful login attempts (for example, a forgotten password) and must be unlocked to log in and access online banking. If a sub user is Locked, a master user can change the sub user's status to Active.
- **Frozen** - Sub users in a Frozen status have been set to Frozen by a master user and are unable to log in or access online banking. If a sub user is Frozen, a master user can change the sub user's status to Active.
- **Disabled** - Sub users in a Disabled status have been set to Disabled by the Admin at the Financial Institution and are unable to log in and access online banking. Sub users in a Disabled status will not display in Business Admin. Once a sub user's status is changed to Disabled, the sub user's status cannot be changed by a master user.

Reset a Sub User's Password

Under the **Users** tab of the Business Admin menu, find the sub user from the user list, click the **ellipsis** (three dots) next to the sub user. Give an email address where the sub user's password will be sent and explain why the password is being reset. Click the **Send New Password** button to send the temporary password.

Please note, a disabled sub user account cannot be used, and the password will not be able to be reset. If the sub user status is *Frozen*, please set it to *Active* before their password can be reset.

Add a Payee

Before a business ACH template or wire transfer can be submitted, you must set up Payees (the recipients of the ACH or wire transfer) in the platform. You can set up a payee (or several) for your business by accessing the **Payees** tab, located within the Business Admin menu. From here, users who are assigned the Manage Payees permission can add, edit, and delete payees.

On the **Payees** tab within the Business Admin menu, click **Add New Payee**. A new drawer will open where you will enter the payee's details. You must select if the payee is a **Person** or a **Business**. Then enter the payee's **Full Name** and **Address**. You can enter information in the other optional fields to further classify the payee, if desired. Lastly, you will click **Add Payee**.

Business Admin



Authorizations Payees Users

All payees 2
 + Add New Payee

1

Type: All ▼

NAME ▲	PAYEE ID ▲
Bob Jones	Employee - Bob Jones
Jane Diamond	Founder - Jane Diamond
 Lea Goins	leagoins0001

Add new payee ✕

Payee details

3 Person Business

Selecting a payee's type is required. A payee's type is an identification tool to help with payment processing. Once this field is saved it cannot be edited.

4 0 / 22

6

We will create a Payee ID for you, or you can enter your own Payee ID.

Payee's address is required to utilize wire payment methods.

5

7

After selecting the payee, use the pencil icon to edit the Payee Details and use the trashcan icon to Delete a Payee.

Add a Payment Method

A payment method is a set of payment instructions related to specific types of payments (either ACH or wires) that will be used by the business banking menus to simplify the payment process. Once a payment method is added to a payee, that payee will then be eligible for payments related to the added payment method.

On the **Payees** tab, select the payee you created from the payee list. Scroll to the *Payment methods* section and click the **plus sign** to add a payment method. Choose the **Payment method type** by selecting one of the tiles. **Complete the required information** for the chosen payment method (Payee's type, Routing Number, Account type, Account Number, etc.). Click **Save**.

Use the pencil icon next to the payment method to make edits to that method and use the trashcan icon to Delete a Payment Method.

Authorize or Reject Transfer Request

The Business Admin menu defaults to display the **Authorizations** tab. Select the **transaction type** to view transactions that are in the **Needs Authorization Status**. Then you can choose to **authorize** or **reject**.

Business Admin



Authorizations Payees Users

1

Authorization Requests

ACH

2

External Transfers

Internal Transfers

Wires

Sort By: Date

DATE	ACCOUNTS	AMOUNT	STATUS
PENDING REQUESTS			
JUN 27 2019	BakerE Delivery Services Business Checking -10 CCO, CREDITS	\$1,001.00	NEEDS AUTH <input checked="" type="checkbox"/>
Authorization Total (1): \$1,001.00 ACH cut-off time: 5:00 PM Expedited ACH cut-off time: 4:00 PM		<input type="button" value="Reject"/>	<input type="button" value="Authorize"/>

3

4

Business ACH Menu

The Business ACH Menu allows you to:

1. Create ACH templates
2. Edit/Delete ACH templates
3. Authorize ACH templates
4. Submit ACH templates
5. Import file
6. Quick ACH

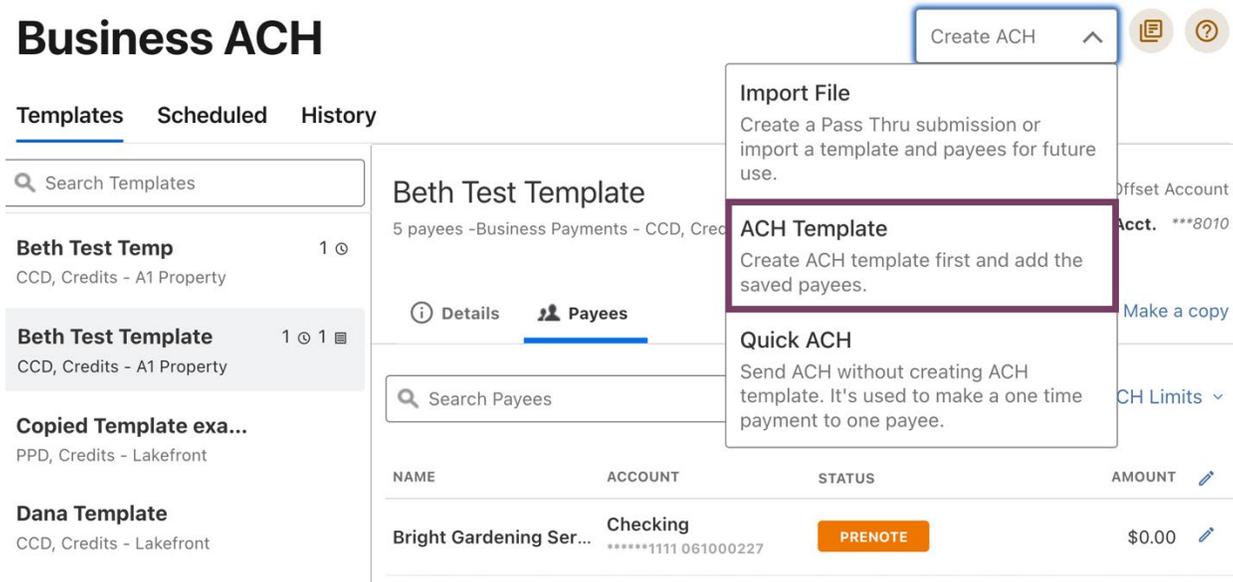
Creating ACH Templates

An ACH template is a set of instructions that once created and saved, can be used in the future as the starting point from which to send payments. Information in the ACH template includes the Template Name, Offset Account, Company Name, Transaction Type, Company Entry Description, Access Level, and Payees. Before you can create ACH templates, you must be assigned to a role with Create ACH Template, Edit ACH Template, and ACH Account permissions.

To create a new ACH template:

1. Select the **ACH Template** button from the dropdown menu.

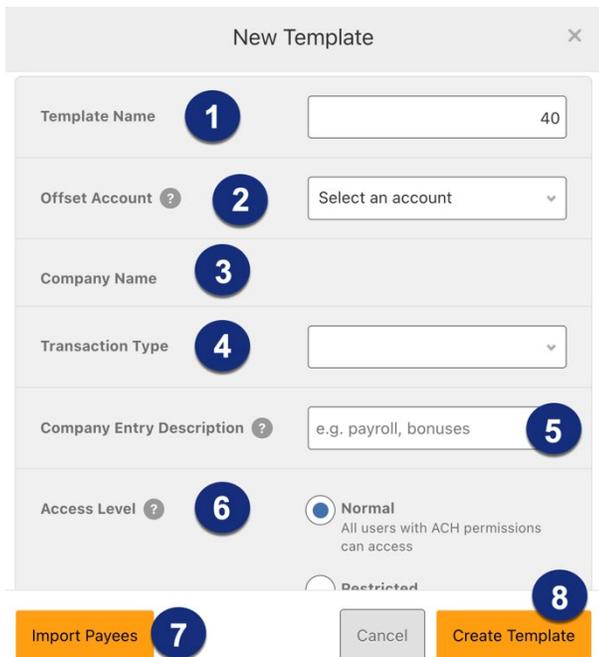
Business ACH



The screenshot shows the 'Business ACH' interface. At the top right, there is a 'Create ACH' button with a dropdown arrow. A dropdown menu is open, showing three options: 'Import File', 'ACH Template', and 'Quick ACH'. The 'ACH Template' option is highlighted with a red box. Below the dropdown, the 'Beth Test Template' details are visible, including a search bar for payees and a table of payees.

NAME	ACCOUNT	STATUS	AMOUNT
Bright Gardening Ser...	Checking *****1111 061000227	PRENOTE	\$0.00

2. The **New Template** window will display:



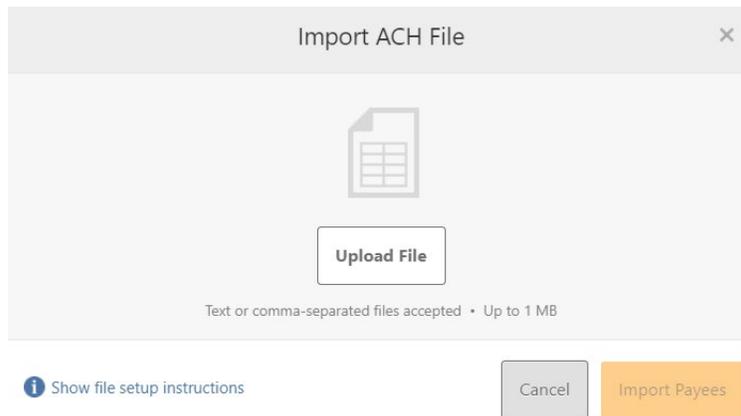
The 'New Template' window is shown with the following fields and callouts:

1. Template Name (text input)
2. Offset Account (dropdown menu)
3. Company Name (text input)
4. Transaction Type (dropdown menu)
5. Company Entry Description (text input)
6. Access Level (radio buttons for Normal and Restricted)
7. Import Payees (button)
8. Create Template (button)

1. Enter a **Template Name**.
2. Select an **Offset Account** from the dropdown menu.



3. Select a **Company Name** from the dropdown menu.
4. Select a **Transaction Type** from the dropdown menu of available Transaction Types.
5. Enter a **Company Entry Description**. This provides a description of the transaction to the payee. (optional)
6. Select an **Access Level** for the template. A template marked as **Restricted** would only be viewable by a business user with **Access to Restricted Templates** permissions.
7. Click the **Import Payees** button to upload a NACHA (.txt) or (.csv) file into business banking for future use (optional). The format required for the file upload is noted in the **Show file setup instructions** link.



8. Click the **Create Template** button to save the new template or click the **Cancel** button to close the New Template window without saving.
9. A confirmation message will display confirming the template has been created.

Editing ACH Templates

The edit template function allows you to edit the Template Name, Offset Account, Company Entry Description, and the Access Level. You must be assigned a role with the **Edit ACH Template** permission in order to edit a template.

Details	Payees	Make a copy	
<input type="text" value="Search Payees"/>	Show ACH Limits ▾		
NAME	ACCOUNT	STATUS	AMOUNT
Fix It Handyman	Checking **3123 062000019	ACTIVE	\$40.00



Important: Edits are not applied to templates pending authorization, authorized templates, or future-dated templates.

Deleting an ACH Template

The delete a template function allows you (if permitted) to delete ACH templates. You must be assigned a role with the **Delete ACH Template** role permission to delete a template.

Important: Deletion is not applied to templates pending authorization, authorized templates, or future-dated templates. If you delete an ACH template that has been scheduled, the system will allow Alpha Financial to process the already scheduled template. To cancel a future-dated template, click the **Scheduled** tab and click the **Cancel** button next to the scheduled template to cancel the template to prevent it from being processed.

Scheduled Tab

The **Scheduled** tab displays future-dated ACH submissions that are scheduled to be and have not yet been processed by Alpha Financial.

Business ACH



Templates Scheduled History

August '23							September '23							October '23						
SU	MO	TU	WE	TH	FR	SA	SU	MO	TU	WE	TH	FR	SA	SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	5						1	2	1	2	3	4	5	6	7
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				



Scheduled Templates

Show Search



History Tab

The **History** tab displays pending batches (submissions available for processing by Alpha Financial) and a template history (submissions that have been completed or rejected by Alpha Financial).

Business ACH



Templates Scheduled History

Pending Batches				
MAY 5	Dana Template	\$27.00 Business Payments - CCD, Credits	SCHEDULED	Cancel

Template History				
				Show Search
FEB 7	Bobby's ACH 3	\$1,001.00 Payroll PPD, Credits	CANCELED	
JUL 7	Beth Test Temp	\$215.00 Business Payments - CCD, Credits	REJECTED	

ACH Processing Days and Cutoff Times

ACH Processing Days are the days of the week that Alpha Financial will process ACH files for delivery and the days of the week that you can select as an Effective Entry date for ACH template submission. An ACH submission cutoff time is the deadline for you to submit an ACH batch on a given day. All ACH submissions received after the submission cutoff time will be treated as received on the following ACH processing day.

Submit an ACH Template

The Submit Template feature allows you to submit templates for authorization (if needed) and processing. In order to submit ACH templates, you must be assigned a role with **Submit Template** permissions, permissions for the ACH transaction type, and the offset account used in the template.

To submit an ACH template:

1. Select the desired template to submit for processing.
2. Click the **Review and Submit** button.

Business ACH

Create ACH ▼  

Templates Scheduled History

- Beth Test Temp** 1 
CCD, Credits - A1 Property
- Beth Test Template** 1  1 
CCD, Credits - A1 Property
- Copied Template exa...**
PPD, Credits - Lakefront
- Dana Template** 1
CCD, Credits - Lakefront
- doin imports**
PPD, Debits - A1 Property Mana
- Doing Imports Daily**
PPD, Debits - A1 Property Mana

Dana Template

2 payees - Business Payments - CCD, Credits Offset Account
Maple Townhomes Operating Acct. **2800

 Details  Payees  Make a copy

Show ACH Limits ▼

NAME	ACCOUNT	STATUS	AMOUNT 
Dana Povlot	Checking *****2222 111000025	ACTIVE	\$15.00 
Janitorial Services	Checking *****1111 121000358	ACTIVE	\$12.00 

+ Add Payees

Total: \$27.00

2
Review and Submit

Please note that you can submit a request for an ACH limit increase. The steps to requesting an increase are provided in the “Submitting a Business Wire Request Over Limit” section as the steps are the same.

Notifications and Alerts

ACH alert contact methods are configurable under **Tools** → **Alerts**. The ACH transfer module supports the following alerts:

- Needs Authorization Alert
- Business ACH Submission Alert
- Rejected By FI Alert

Business Wires Menu

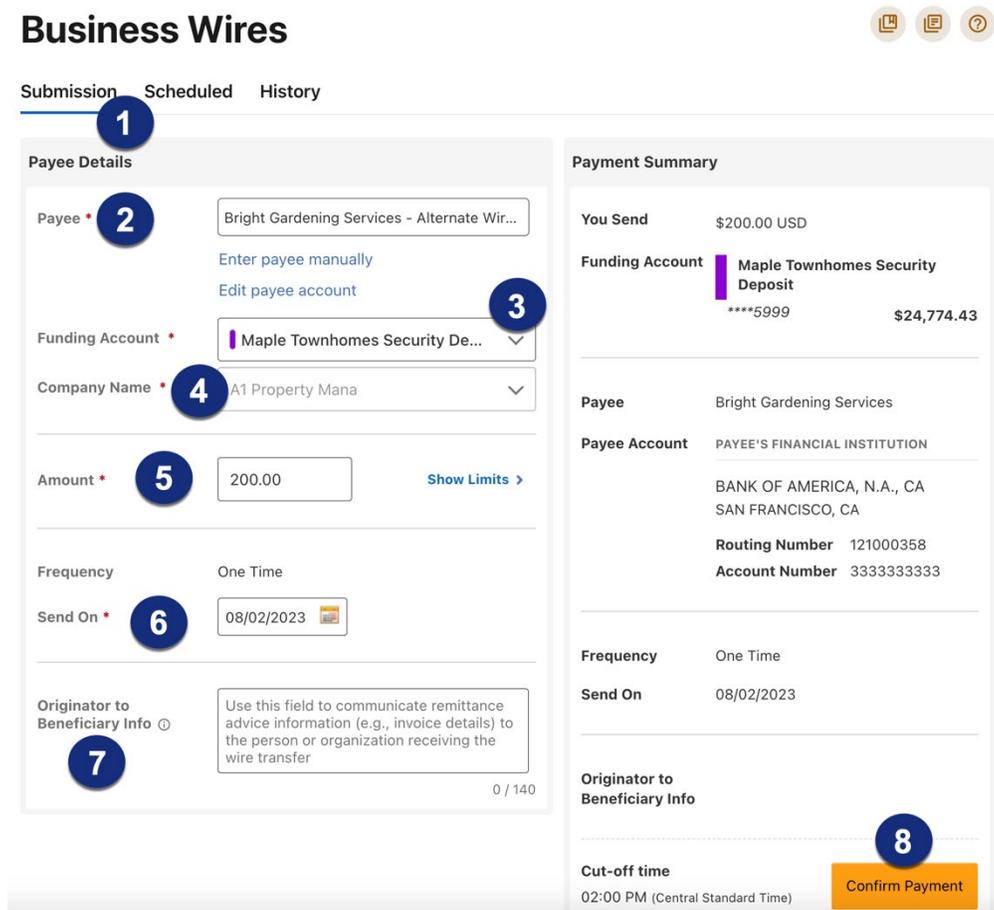
Wire transfers offer convenience, speed, and security. The Business Wires menu has specific accounts, payees, limits, and authorizations available and allows qualified accounts to send out wire transfers. A payee may have more than one account depending on the number of wire payment methods that have been established.

Business Wires allows you to:

- Create wire payment requests
- Authorize wire payment requests
- Set limits

Submit a Business Wire Request

In the Business Wires menu, from the **Submission** tab, select a **Payee** from the dropdown list. Choose a **Funding Account** and a **Company Name**. Enter the **Amount** for the transfer. Select the **Send On** date. Enter any additional details into the **Originator to Beneficiary Info** field (optional). Click **Confirm Payment**.



Business Wires

Submission | Scheduled | History

1 Payee Details

Payee * **2** Bright Gardening Services - Alternate Wir...
[Enter payee manually](#)
[Edit payee account](#)

Funding Account * **3** Maple Townhomes Security De...
 Company Name * **4** A1 Property Mana

Amount * **5** 200.00 [Show Limits >](#)

Frequency One Time

Send On * **6** 08/02/2023

Originator to Beneficiary Info **7**
 Use this field to communicate remittance advice information (e.g., invoice details) to the person or organization receiving the wire transfer
 0 / 140

Payment Summary

You Send \$200.00 USD

Funding Account **3** Maple Townhomes Security Deposit
 ****5999 \$24,774.43

Payee Bright Gardening Services

Payee Account PAYEE'S FINANCIAL INSTITUTION
 BANK OF AMERICA, N.A., CA
 SAN FRANCISCO, CA
 Routing Number 121000358
 Account Number 333333333

Frequency One Time

Send On 08/02/2023

Originator to Beneficiary Info

Cut-off time 02:00 PM (Central Standard Time) **8** [Confirm Payment](#)



Search for a Business Wire

On the **Scheduled** tab of the Business Wires menu, click the **Show Search** button to view search fields. **Enter search criteria** and click the **Search** button.

Cancel Business Wire Request

Wires cannot be edited. If there was a mistake made, you will need to cancel the wire transfer and submit a new request. Under the **Scheduled** tab, locate the wire transfer and click the **Cancel** button, enter a reason, and select **Cancel Payment**.

Submitting a Business Wire Request Over Limit

When you need to send a business wire over your set limit, you can send a request to your FI for a limit increase. This request can include a temporary or a permanent increase. After sending your request it will be sent to your FI via a secure message in the Message Center. You start by requesting your business wire normally and including the increased wire amount. You will receive a drawer notification that your limits have been exceeded and you can **Request Increase**.

The screenshot shows a wire transfer form with the following details:

- Payee Details:** Payee * Bee Cave Honey - BeeCave WIRE; Funding Account * Corporate Operating Acct.; Company Name * RealEstate Prop.
- Amount:** 25,000.00
- Frequency:** One Time
- Send On:** 09/18/2024
- Current Limits:** Daily \$20,000.00, Weekly \$75,000.00, Monthly \$100,000.00

The error message states: "You have exceeded your limits: The transaction you're attempting to send has exceeded your daily/weekly/monthly limits." Below the error message, there is a "Request Increase" button.

When submitting your request for an increase, you will fill in the **Desired Limits** and include an **Expiration Date**. If the limit increase is temporary, you will select an expiration date. If you would like the increase to be permanent, you will check the box that there is no expiration date. You can include a **Message** explaining the reason for the increase that will be seen by an administrator at your FI and **Upload** any supporting



documentation. From there, you will select the **Response Time** (5 hours or 1 hour) that you would like to be notified about the approval or denial of the increase. Both response times usually come with a fee. When you have filled in all of the information you will select **Submit** to send your request.

The screenshot shows a 'Limit Increase Request' form. At the top left is a back arrow and the title 'Limit Increase Request'. Below this is a section titled 'Desired Limits' with a callout '1'. It contains three buttons: 'Daily \$25,000.00', 'Weekly \$76,000.00', and 'Monthly \$150,000.00'. Below these is an 'Expiration Date' dropdown menu showing '09/30/2024' with a callout '2'. There is a radio button for 'No Expiration Date'. Below that is a 'Message' field containing the text 'Limit increase needed until the end of September.' with a character count '49 / 1000'. A dashed box with a callout '3' contains an upload icon and the text 'Drag and drop or click to upload documents'. Below this is the text 'You can attach up to 10 files (15 MB total)'. The next section is 'Choose Your Response Time' with a callout '4', featuring two radio buttons: '5 hour(s) for a fee' (selected) and '1 hour(s) for an expedited fee'. At the bottom are two buttons: 'Back' and 'Submit' with a callout '5'.

You will be shown a message saying that your request is **Pending FI Review**. You will see the pending request in your Business Wires menu under the Scheduled tab. After your FI approves or denies your request, you will be notified via the Secure Message Center.

It is important to note that a limit increase can be requested for ACH as well. The same steps will be followed for submitting an ACH limit increase request.

Business Reports Menu

The Business Reports menu provides you with the ability to access Standard Reports and create Custom Reports. Custom Report generation tools provide you with the ability to generate new reports to yield new insights on your ACH details and transaction history. The three main areas include:

1. **Quick Filter Cards** - Quick Filter Cards are located above the Balance Trend chart on the Business Reports Dashboard. The Quick Filter Cards show the current balance of all the business user's deposit accounts and loans. If you click on a Quick Filter Card, the Balance Trend chart will instantly be filtered to show only trends for those accounts (all other filter settings remain the same). The Quick Filter Card selection will cascade to the Balance Trend chart, Transaction Summary, and the Transaction Overview.
2. **Balance Trend** - The Balance Trend chart is a line graph at the center of the dashboard that shows the trend in deposit account balances for a selected set of accounts over a selected period of time.
3. **Transaction Overview** - The Transaction Overview is a high-level bar chart connected to the bottom of the Balance Trend chart on the Business Reports Dashboard. The Transaction Overview chart will display the sum of total debits and credits for the selected deposit accounts on a daily basis for the selected Date Range. The selected accounts and the selected time period are inherited from the options used for the Balance Trend chart.

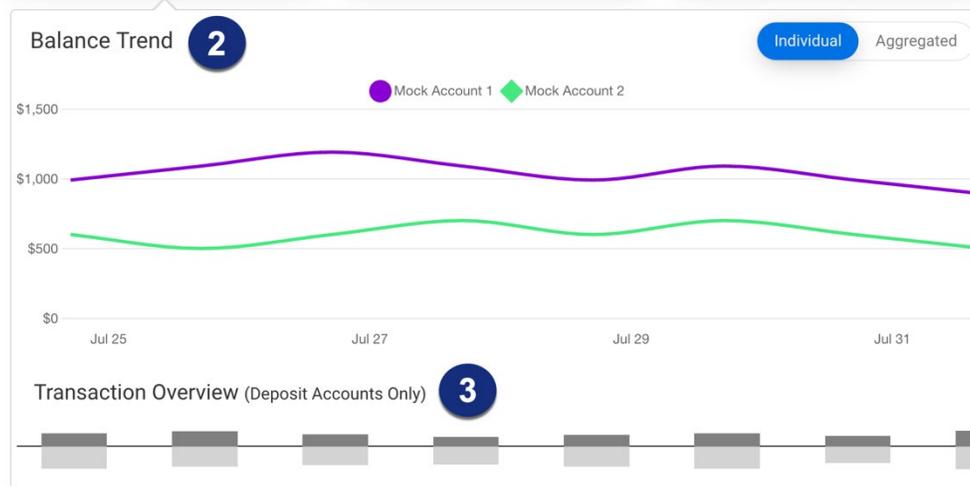
Business Reports

Dashboard Reports

Account Summary

Jul 25, 2023 - Aug 1, 2023

Date Range Past 7 Days



Create a Custom Report

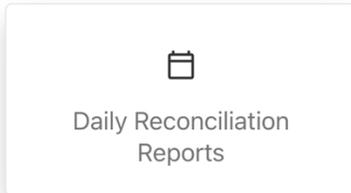
The **Reports** tab will show you standard reports that are generated by Alpha Financial. You will also be able to run your own custom reports. Within the Business Reports menu, select the **Create Custom Report** button.

Business Reports



Dashboard Reports

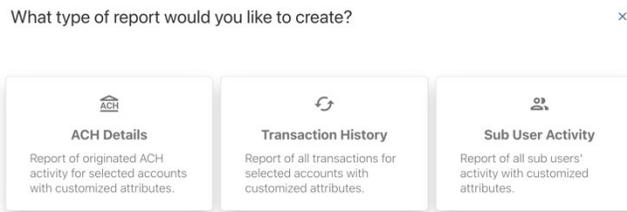
Standard Reports



Custom Reports

Search Filter

Then, select the **Custom Report Type** and that type will display with default columns.



1. Click the **Edit** (pencil) icon next to the report name report. Click the **Accept** (checkmark) button to save.
2. The **Add / Remove Columns** button will allow you to add or remove columns from the Custom Report by checking the boxes next to the column to add (if the box is blank) or remove (if the box is checked). Click the **Update** button to save the changes or click the **Cancel** button to close the window without saving the changes.
3. Click the **Save Dynamic Report** button, enter a name, description, date range, and share type and select to receive a notification via email when the report is ready.
4. Click the **Save** button to create the new Custom Report or click the **Cancel** button to close the Custom Report without saving.

Business Reports



Dashboard **Reports**

< All Reports

Untitled Report  **1**

Save Changes to Download **3**

Save Dynamic Report

Add / Remove Columns **2**

Date Range

Past 30 Days 

DATE 	TEMPLATE 	COMPANY NAME 
08 NOV 2023	Template99	My Comp
07 NOV 2023	Template98	My Comp
06 NOV 2023	Template97	My Comp

Edit Custom Reports

To Edit a Custom Report, select the report you would like to edit and make the appropriate changes. Once all edits have been completed, click the **Update Dynamic Report** button.

Business Reports



Dashboard **Reports**

< All Reports

This is a sample report #299 

 Download Report

Update Dynamic Report

Add / Remove Columns

Date Range

Past 30 Days 

Delete Custom Reports

Use the **Delete** icon (trash can) to remove the Custom Report.

NAME 	DESCRIPTION	CREATED ON 		
This is a sample report #300	This is the sample description for report #300	27 May		