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Account Activity Go-To Guide

Last updated April 2026

Key Features

Account Activity in Connect provides a comprehensive view of all transactions associated with an account.

1. **Transaction Summary**
   - **Balance Overview:** Displays current, available, and pending balances for each account
   - **Recent Transactions:** Lists the most recent transactions, including deposits, withdrawals, transfers, and payments
2. **Detailed Transaction History:**
   - **Search and Filter Options:** Allows a search for specific transactions by date range, amount, type, and description
   - **Transaction Details:** Provides in-depth details for each transaction, including date, amount, type and reference number
3. **Download and Export:**
   - **Download Options:** Downloadable transaction history in various file formats (CSV, PDF, Excel)
   - **Export Capabilities:** Allows an export of transaction data
4. **Account Actions**
   - **Order checks and deposit slips:** Enables ordering checks and deposit slips
   - **Create account letters:** Allows generation of account letters
   - **Update settings and preferences:** Allows settings and preferences to be customized
   - **Reporting:** Allows creation of customized reports

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Overview

1. On the overview dashboard, high-level account information can be displayed as grouped by business, account type or custom group by using the dropdown at the top of the menu
2. Select an **account name** or the **ellipsis menu** to view detailed account information such as statements, generate account letters, view transaction activity, and more
3. These actions can also be accessed on the account overview page if you select the account name on the overview dashboard

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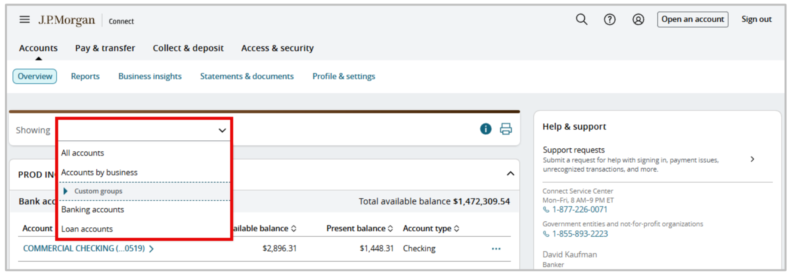

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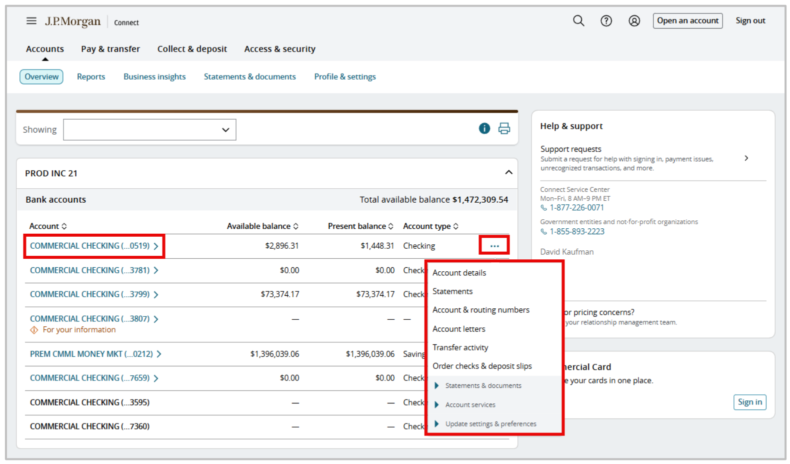

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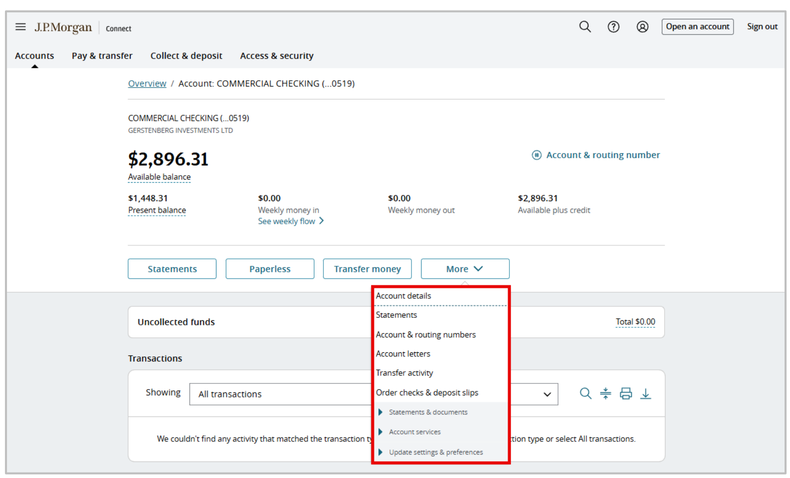

Reports

1. Select **Reports** from the account overview page

2. **To create a report,** choose the **Company and group names, transaction type, date range, amounts** and designate a **report name**, then select **Submit**

3. **To schedule a report**, choose the report to schedule under the **My Saved Reports** section and select **Set up a schedule.** This will launch a side menu pop-out

4. From the side menu, set the **Repeats schedule** (Daily, Weekly, Monthly), **Start date**, **Stop date** (On, After, Never) and **File type**, then select **Save**

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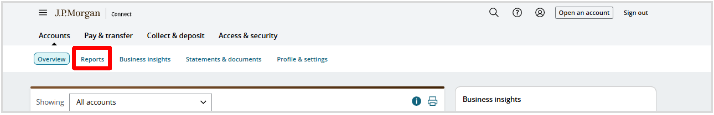

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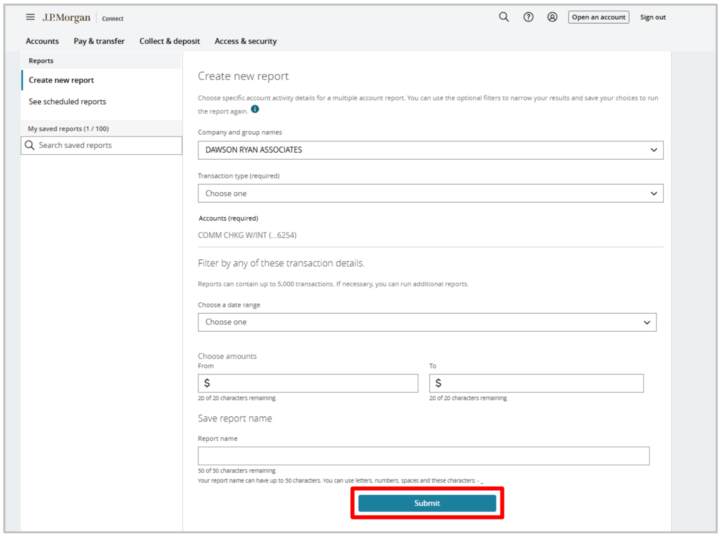

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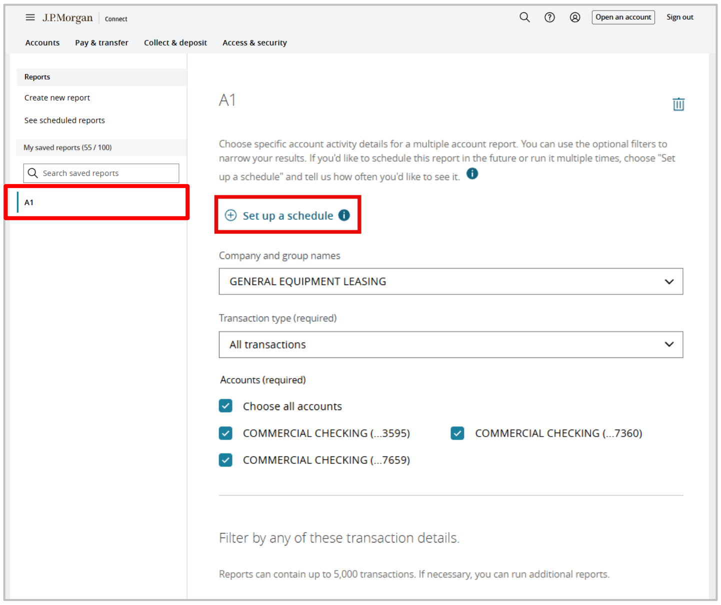

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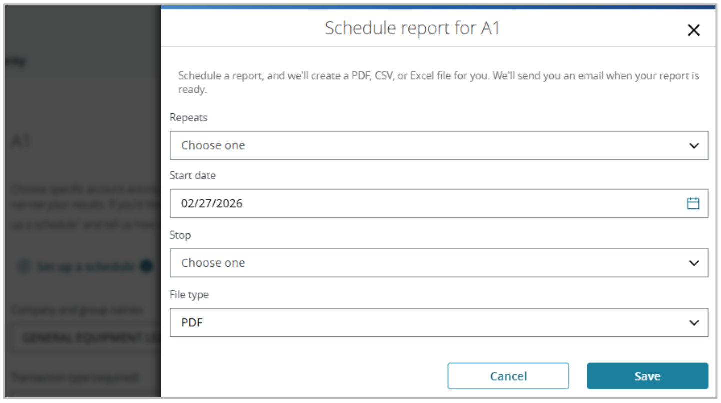

Reports (Continued)

5. To **delete a scheduled report,** select the relevant report to delete using the checkboxes on the right-hand side. Select **Delete**

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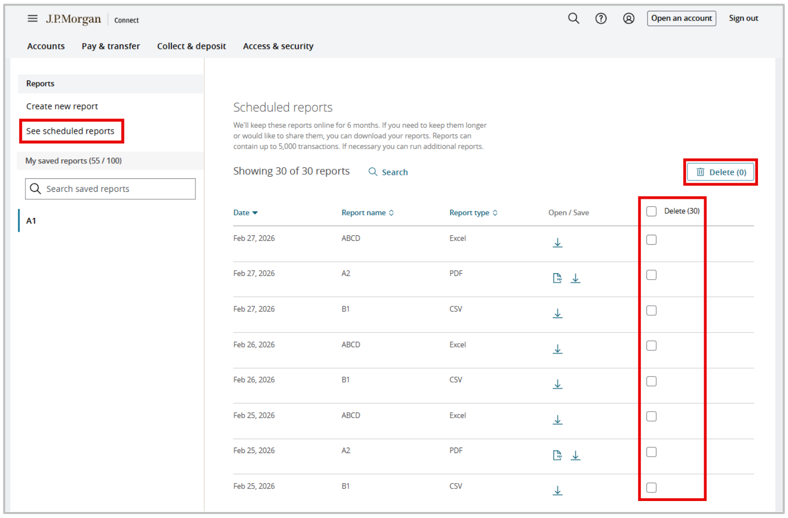

Business Insights

1. **Business insights** can be accessed via the top navigation bar on the overview dashboard or by selecting the **Go to insights dashboard** link
2. **Business insights** provides visualizations of account cashflow. Select which accounts to view data for by clicking on the blue text that displays how many account(s) are currently selected

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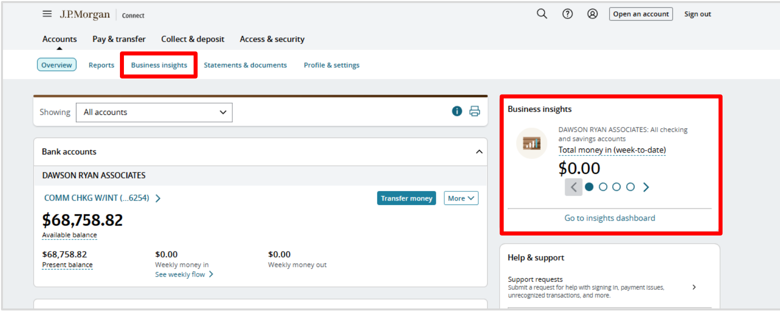

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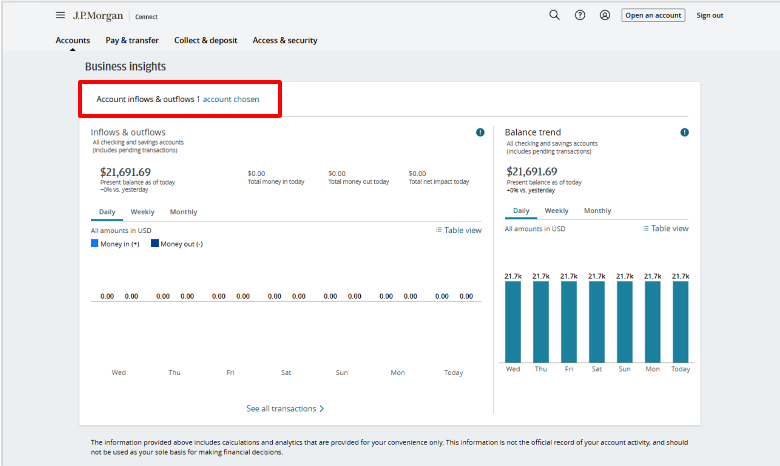

Statements and Account Actions

1. Account Letters

a. To view account letters, select the ellipsis menu and then **Account Letters**

b. A new page will load. Select the type of letter desired and **Download** the document

2. Transfer Activity

a. To view account statements, select the ellipsis menu and select **Transfer activity**

b. For pending transfers, select **Edit** or **Cancel** to make changes

c. To make a new transfer, select **Transfer Money** which will lead to the flow

3. Order checks and deposit slips

a. To order checks and deposit slips, select the ellipsis menu and select **Order checks & deposit slips**

b. A new page will load where an account to order checks and deposit slips can be selected, or select 'Go to Deluxe' for more extensive offerings

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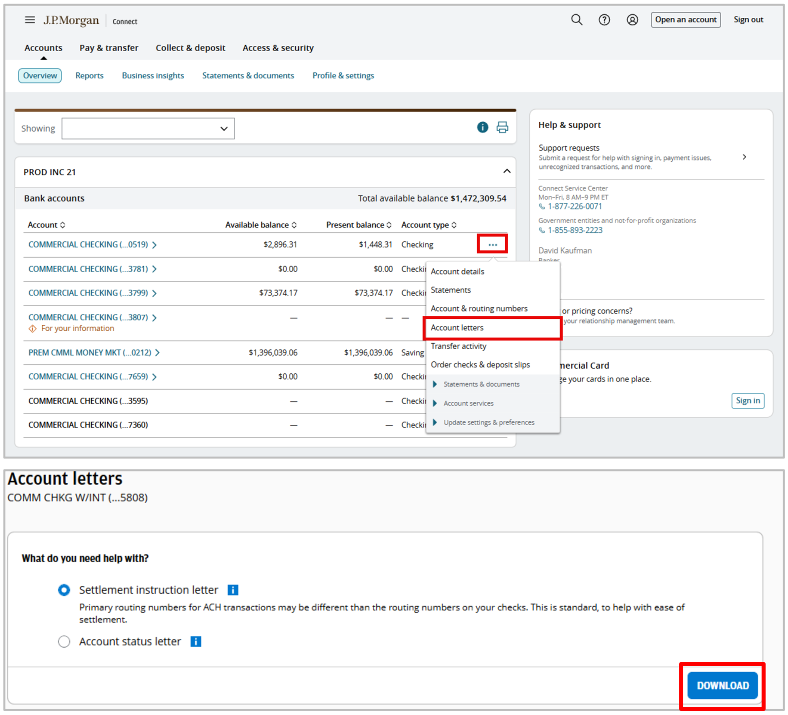

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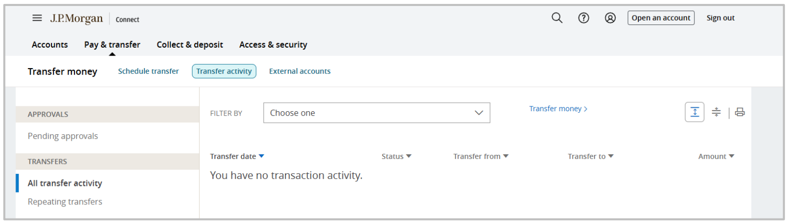

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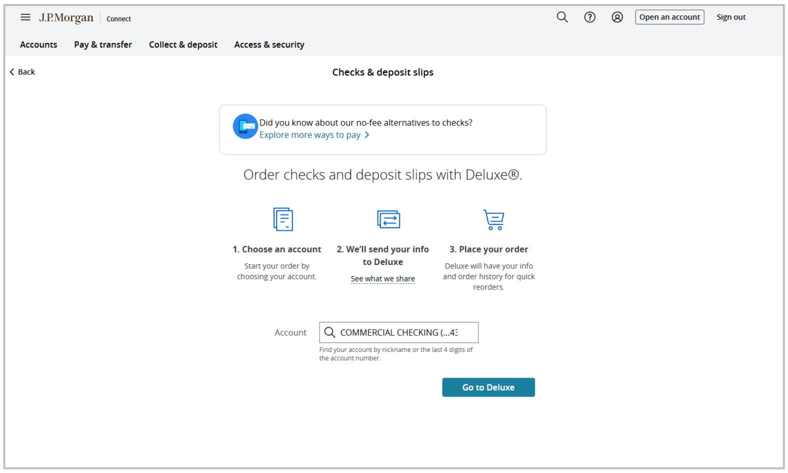
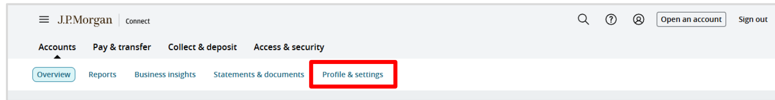


Profile & Settings

From the overview dashboard, select **Profile & settings**



1. Set primary account

a. Select **Account settings**, then **Set primary account**

b. Choose an account and select **Save**

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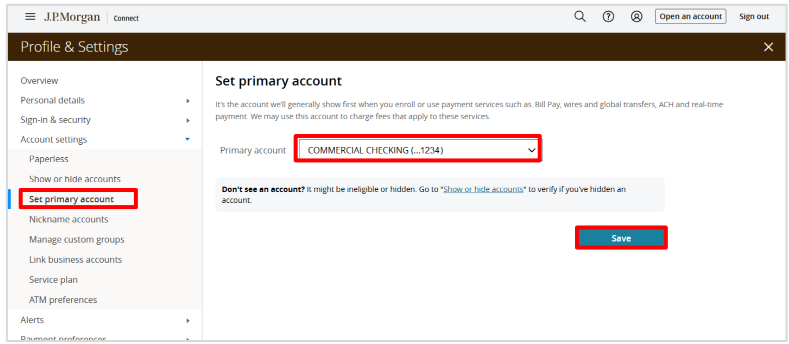

2. Set account nicknames

a. Select **Account settings**, then **Nickname accounts**

b. From the list, find the desired account(s) to create nicknames for

c. Add the account nicknames and select **Save**

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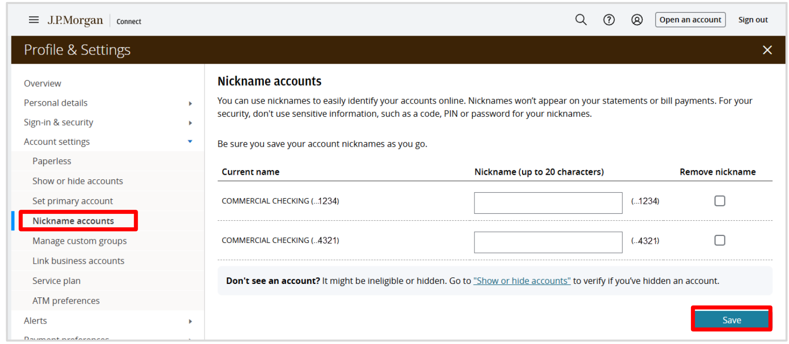

3. Add custom groups

a. Select account settings then **Manage custom groups**

b. Select **Create new group**

c. Name the group and select relevant banking and credit accounts, then **Save changes**

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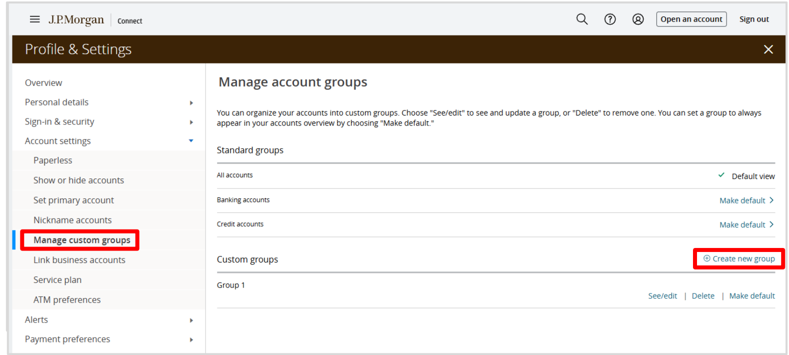

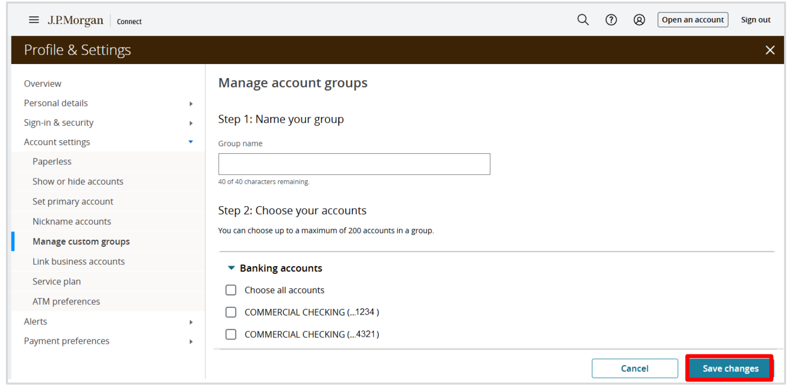

Account Actions

1. Account Dashboard

a. To view the account dashboard, select the account

b. Access account statements, paperless, transfer money and more via the dashboard

c. Account activity can be filtered by type

d. Select the **Search icon** to find details for a specific transaction

2. Account statements

a. To view account statements, select the More menu from account dashboard page

b. Choose the account and statement type, then select **View** or **Download**

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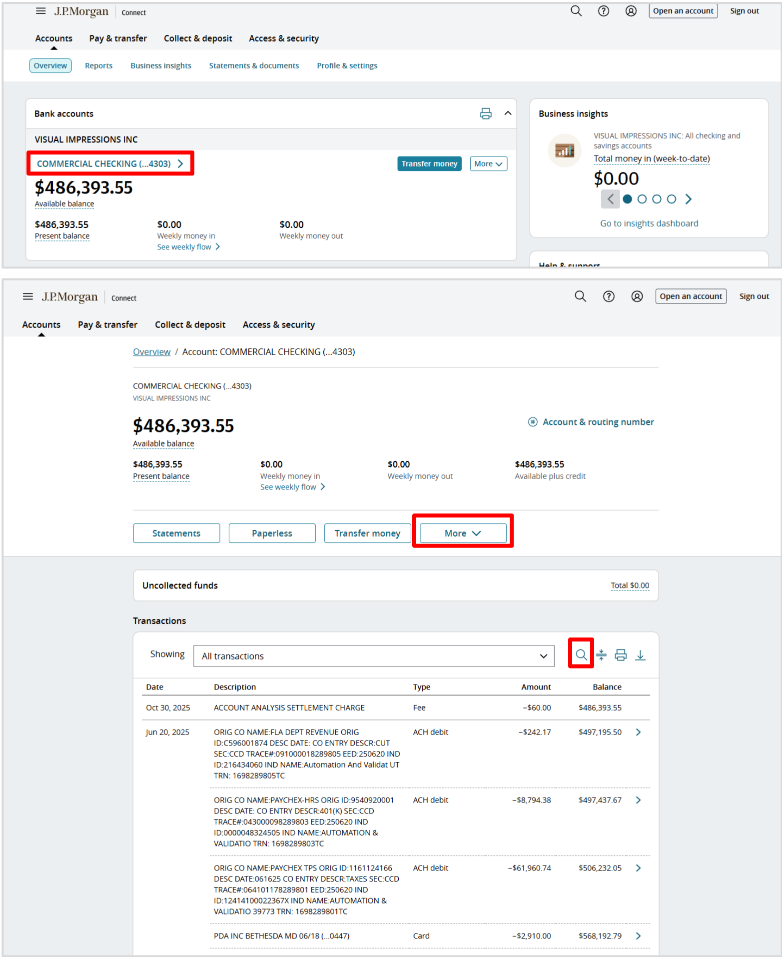

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