Eastern Bank

May 2020

EASTERN BUSINESS BANKING™

Saved Views
Quick Reference Guide

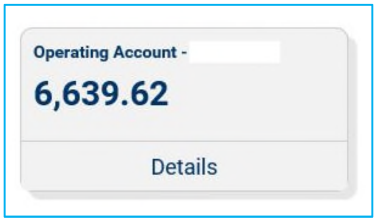
HOW TO CREATE SAVED VIEWS

You can create and save account transaction views to display, print or export. Follow these steps to select from Standard Views or create Custom Views of transaction details.

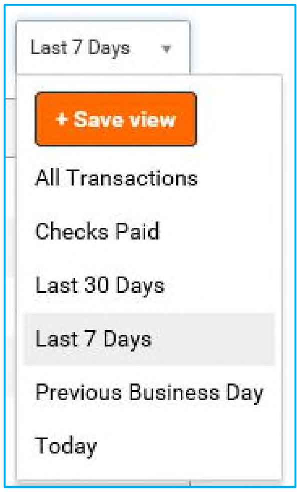
HOW TO SELECT A STANDARD VIEW

The **Account Details** screen offers a list of predefined views that display transaction information.

1. From the Home Page, navigate to an account card and click **Details**.



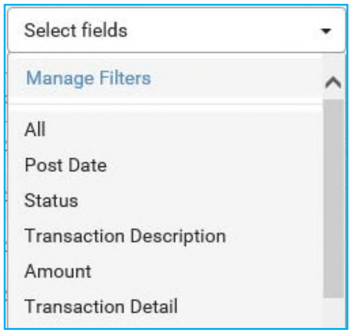
2. The default **Standard View** for the account transaction table is Last 7 Days. Click ▼ to view and select additional Standard View options.



HOW TO CREATE A CUSTOM VIEW

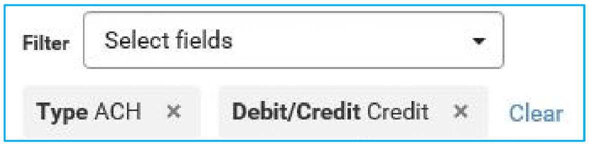
You can create Custom Views of the account transaction table based on filters such as date, amount or transaction type. You can also save a preferred display by adding, deleting or moving columns or changing the number of transactions displayed on the page.

1. **To add a filter** to the transaction table, click ▼ to expand the **Select fields** drop-down.



2. Select a filter and enter filter criteria. Then click **Apply**.

3. Repeat these steps until you have selected as many filters as desired. If you need to remove an added filter, click **x**.

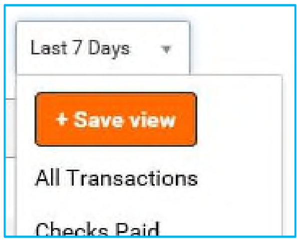


4. **To move a column** to a new position, hover over the column heading then click and hold to drag and drop the column to a new position.
5. **To add or remove a column**, click the **Manage Columns** icon to select or deselect columns, then click **Update**.

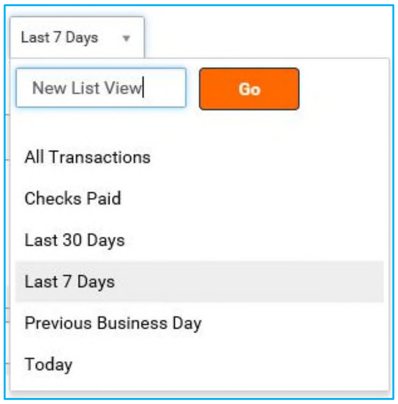
HOW TO SAVE YOUR VIEW

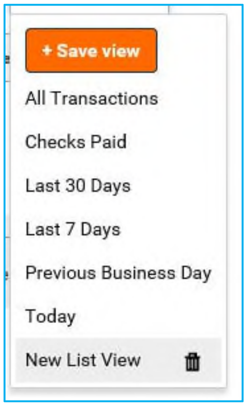
Once you have arranged your view with the desired columns and filters you can save the list for future use.

1. Click ▼ to expand the **View** drop-down and select **+ Save View**.



2. Enter a name for your view and click **Go**. You can now access the Saved View from the View drop-down list.





3. To set any view as the default view, select a view from the list and click **Set as Default**.