PRESENTED BY:

AccountingWare

WELCOME TO

Back to Basics

Zach Montandon & Aidan Culwell
Support Team

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  Evaluate risks before acting on ideas from this session.
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  Opinions may not reflect the opinions of AccountingWare.
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SESSION INFO

AUDIO/VIDEO

If you cannot hear sound or see the presentation now, adjust or change your settings.

SURVEY

At the end of the session, fill out a quick survey letting us know how we did.

RESOURCES

The slides and a recording will be sent via email.

QUESTIONS

Use the “Questions” panel to chat with the presenters and AccountingWare team.

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ABOUT THE PRESENTERS

Aidan Culwell
Support Team Member

Zach Montandon
Support Team Member

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AGENDA

1. Help Resources
2. HD View
3. Filters and Lookup
4. Saved Answers
5. Display Options

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Help Resources

Help Text

- accountingware.com/help
- Table of Contents
- Search field
- Use F1 in the software for context sensitive articles
- Use the blue question mark at the top of the views and forms

Release Notes

- accountingware.com/rn
- View the latest and greatest features coming your way
- Browse by version number
- Browse by package
- Prompted to view the first time you log in after an upgrade

* www.accountingware.com/activreporterhelp

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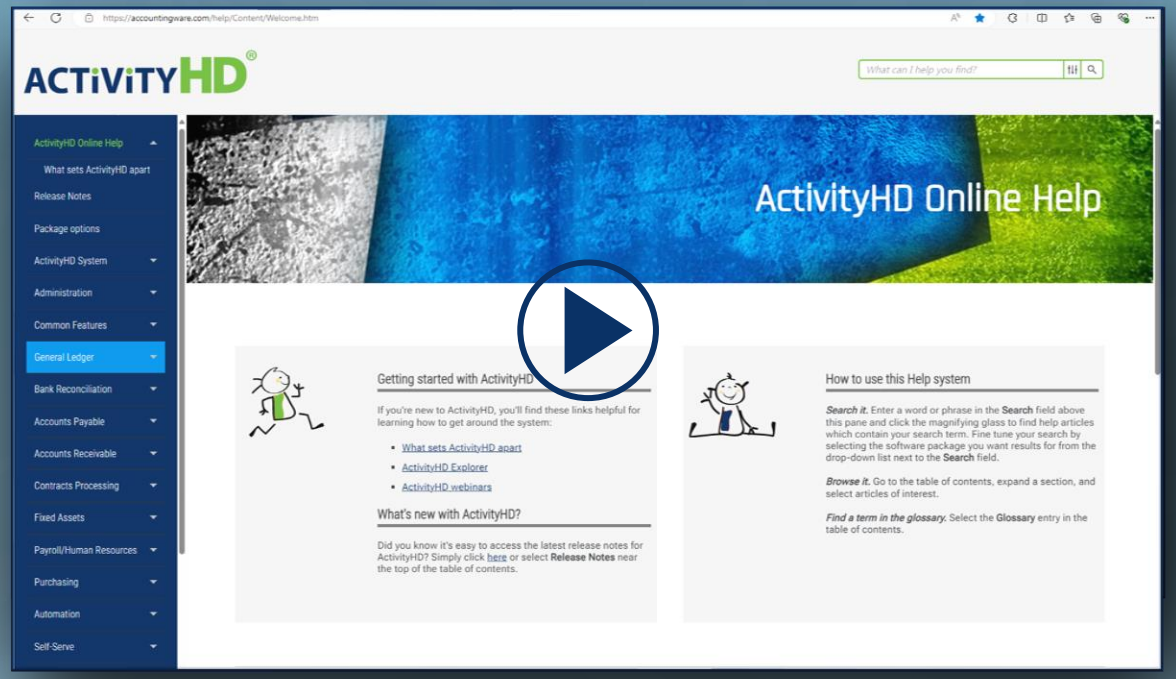
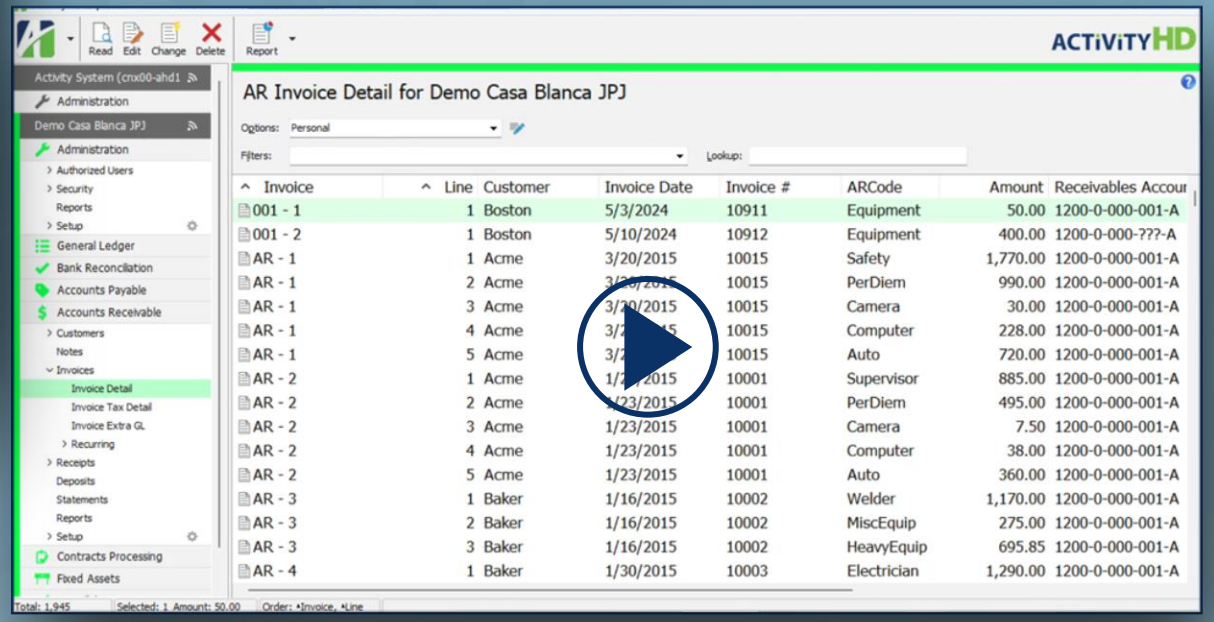
Online and Inside ActivityHD





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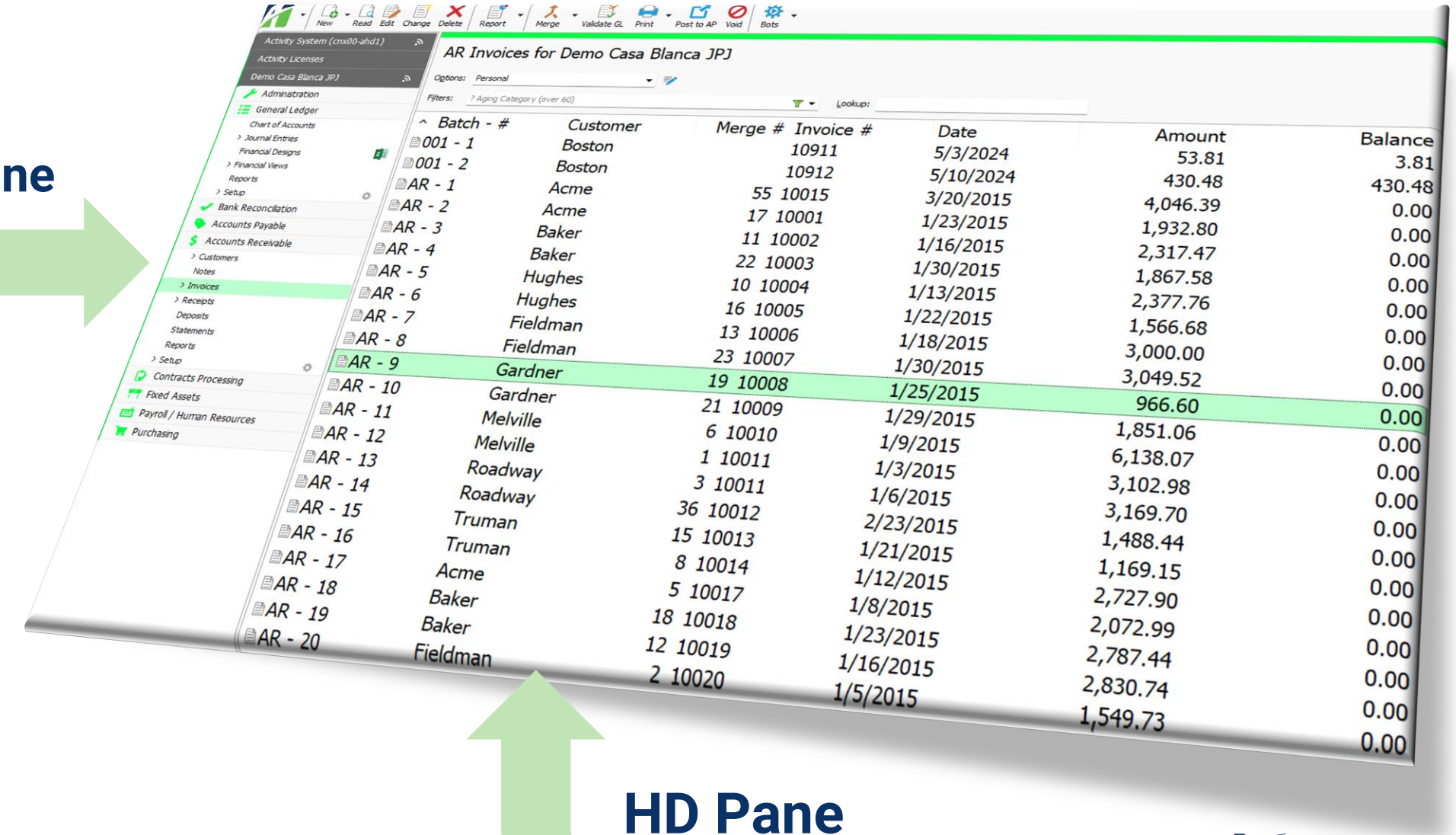
HD View

Navigation Pane



HD Pane

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Meaningful & Useful

- Change columns based on the data you need to see
- Limit with filters and the lookup field
- Select rows for review
- Use the status bar instead of running a report
- New Record, Read/Edit, AND… it can change your LIFE!

COMPLETE LIST OF YOUR TABLE OR DATA

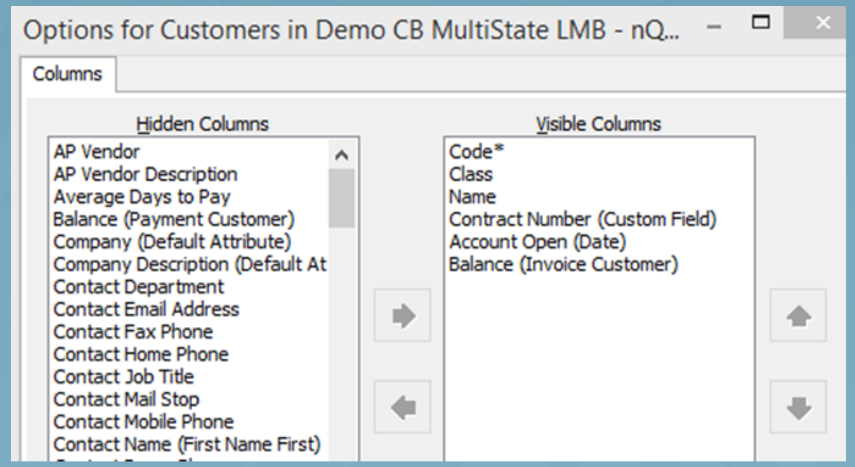
AR Invoices for Demo Aspire

Filters: Outstanding Lookup:

Batch - #	Customer	Merge #	Invoice #	Date	Amount	Balance	Description	Attributes
AR - 6	Gallery		00542	3/15/2024	3,000.00	3,000.00	Security Deposit	EventsAttr: 00000
lmb - 319	Amped		ConvTest	3/7/2024	-550.00	-550.00		EventsAttr: 00000
AR - 1	LubChild		00535	7/31/2023	300.00	300.00	Contract Payment	
TESt1 - 1	Alexander	467	00534	7/6/2023	74.46	74.46	Settlement Concessions,...	
test - 24	Boys&Girls	462	00530	7/9/2022	40.00	40.00	Settlement: Games & Fu...	EventsAttr: BUSEX
LB - 42	MediaMax	468	00519	4/30/2023	15,000.00	15,000.00	Facility Rental	EventsAttr: CONCE
CON001 - 3	FrenshipHS		00510	1/18/2023	2,250.00	2,250.00	Contract Payment	EventsAttr: PROM
CON001 - 2	FrenshipHS		00509	1/18/2023	2,000.00	2,000.00	Contract Payment	EventsAttr: PROM
LB - 41	Gallery		00507	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 40	Gallery		00506	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 39	Gallery		00505	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 38	Gallery		00504	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 37	Gallery		00503	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 36	Gallery		00502	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 35	Gallery		00501	3/5/2022	2,000.00	2,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 34	Compassionate		00500	7/2/2022	2,159.00	2,159.00	Contract Payment	EventsAttr: FUNDR
LB - 31	LubHigh	450	00498	6/16/2022	3,300.50	3,300.50	Contract Payment	
CP - 3	LubHigh	445	00495	7/10/2022	601.00	601.00	Contract Payment	
LB - 30	Gallery		00491	5/30/2022	1,000.00	1,000.00	Contract Payment	EventsAttr: AVENU
LB - 29	Gallery		00490	5/30/2022	1,000.00	1,000.00	Contract Payment	EventsAttr: AVENU
LB - 28	Gallery		00489	5/30/2022	500.00	500.00	Rent Payment on Contract	EventsAttr: AVENU
SR - 4	LubHigh	444	00485	6/22/2022	2,259.00	259.00	Contract Payment	
SR - 2	Compassionate		00482	6/22/2022	2,159.00	2,159.00	Contract Payment	EventsAttr: FUNDR
SR - 1	Compassionate		00481	6/22/2022	1,000.00	1,000.00	Contract Payment	EventsAttr: FUNDR
LB - 24	Youth		00480	6/15/2022	10.00	10.00	Settlement: Fundraiser ...	EventsAttr: FUNDR
LB - 23	Youth	442	00479	4/1/2022	1,053.00	1,053.00	Contract Payment 1/3	EventsAttr: FUNDR
LB - 22	Youth	441	00478	4/1/2022	1,053.00	1,053.00	Contract Payment 1/3	EventsAttr: FUNDR
LB - 21	Youth	440	00477	4/1/2022	1,053.00	1,053.00	Contract Payment 1 /3	EventsAttr: FUNDR
LB - 8	Gallery		00465	3/20/2022	14,000.00	14,000.00	Rent Payment on Contract	EventsAttr: AVENU
LB - 4	Boys&Girls	428	00429	6/1/2022	1,000.00	1,000.00	Contract Payment	EventsAttr: BUSEX
LB - 3	Boys&Girls	427	00428	6/1/2022	1,000.00	1,000.00	Contract Payment	EventsAttr: BUSEX

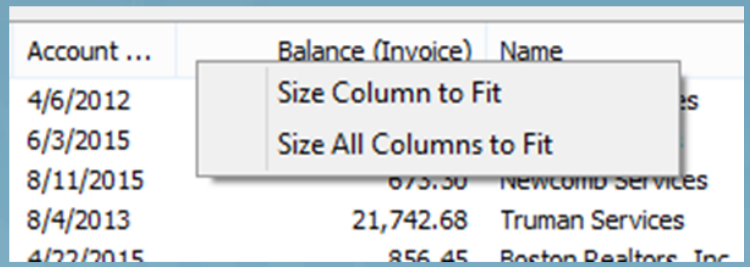
Selected: 10 Amount: 10,635.00 Balance: 8,635.00 Order: Created

Columns



SIZING

Right click on the column headings for new size options

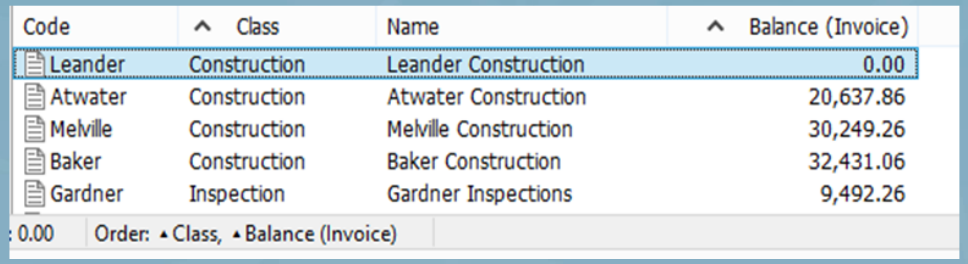


ADDING AND REMOVING

Right click in the HD pane and choose options to change column display

SORTING

- Sort options display in the status bar



REARRANGING

- Drag and drop columns to rearrange the display

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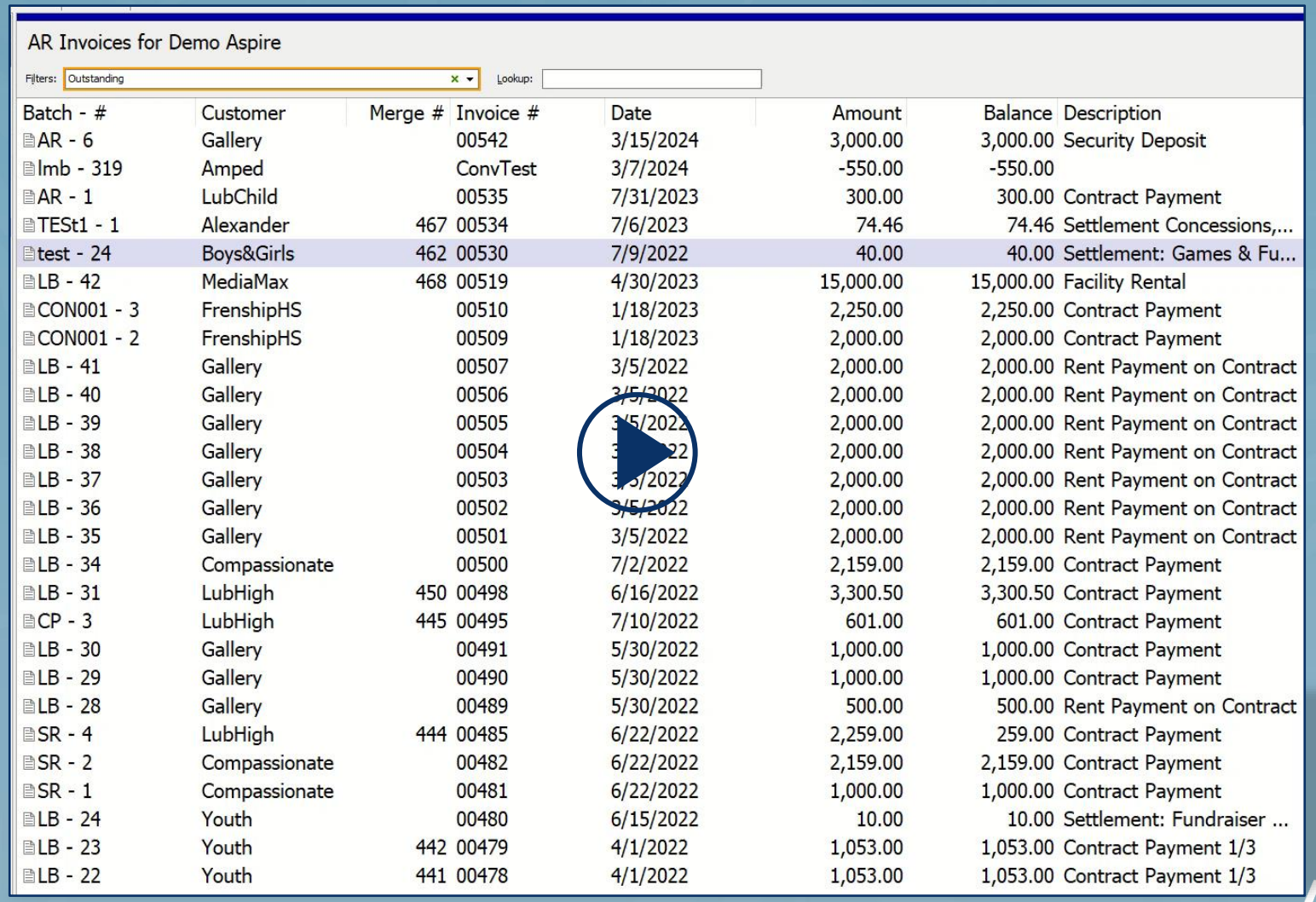
Let’s see it in action



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lmb - 319	Amped		ConvTest	3/7/2024	-550.00	-550.00	
AR - 1	LubChild		00535	7/31/2023	300.00	300.00	Contract Payment
TESt1 - 1	Alexander	467	00534	7/6/2023	74.46	74.46	Settlement Concessions,...
test - 24	Boys&Girls	462	00530	7/9/2022	40.00	40.00	Settlement: Games & Fu...
LB - 42	MediaMax	468	00519	4/30/2023	15,000.00	15,000.00	Facility Rental
CON001 - 3	FrenshipHS		00510	1/18/2023	2,250.00	2,250.00	Contract Payment
CON001 - 2	FrenshipHS		00509	1/18/2023	2,000.00	2,000.00	Contract Payment
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LB - 22	Youth	441	00478	4/1/2022	1,053.00	1,053.00	Contract Payment 1/3

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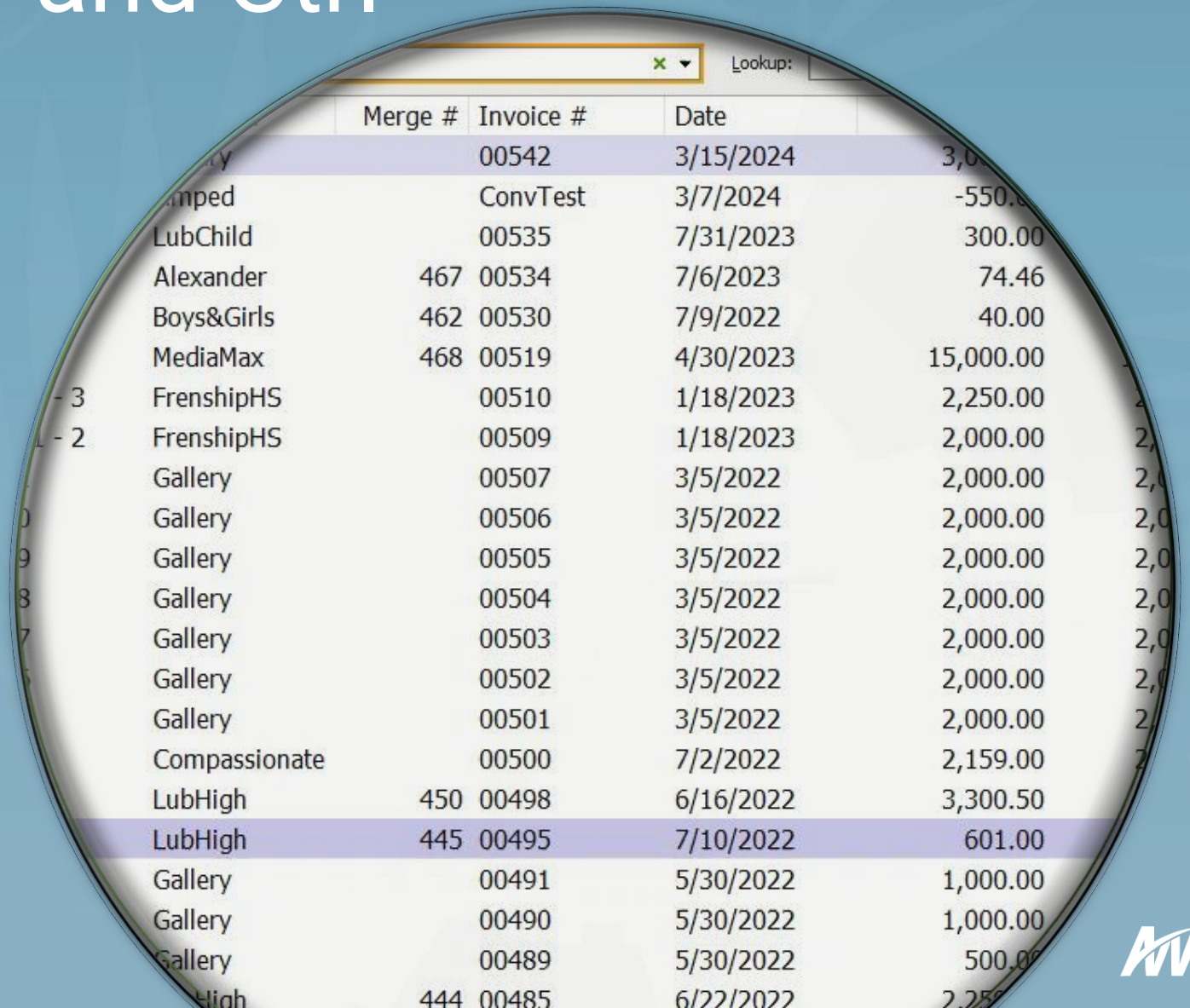
Zoom In or Out in the HD View with Ctrl + and Ctrl -



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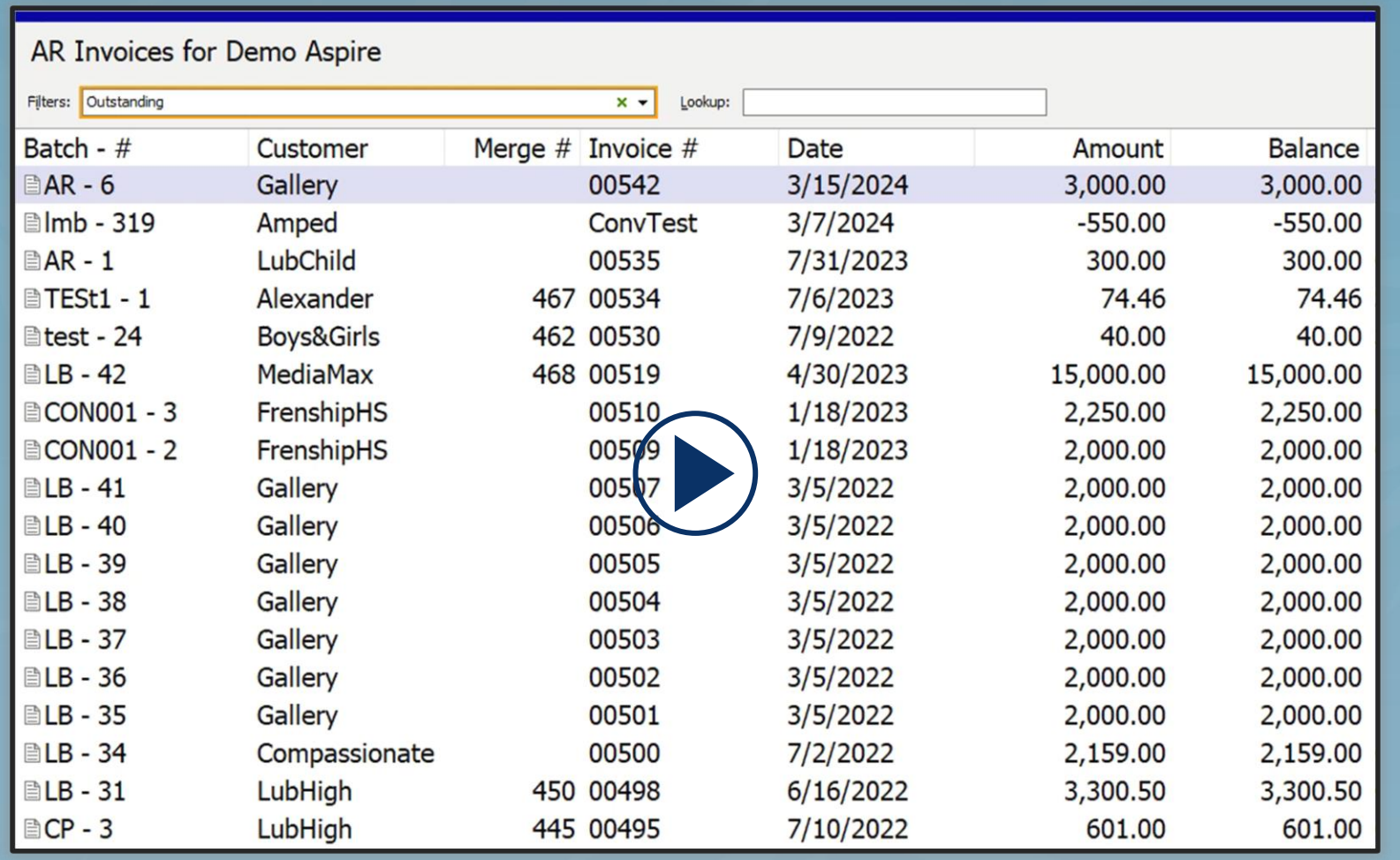
Copy to Clipboard (Ctrl + C)
Copy to Excel (Shift+Ctrl+C)



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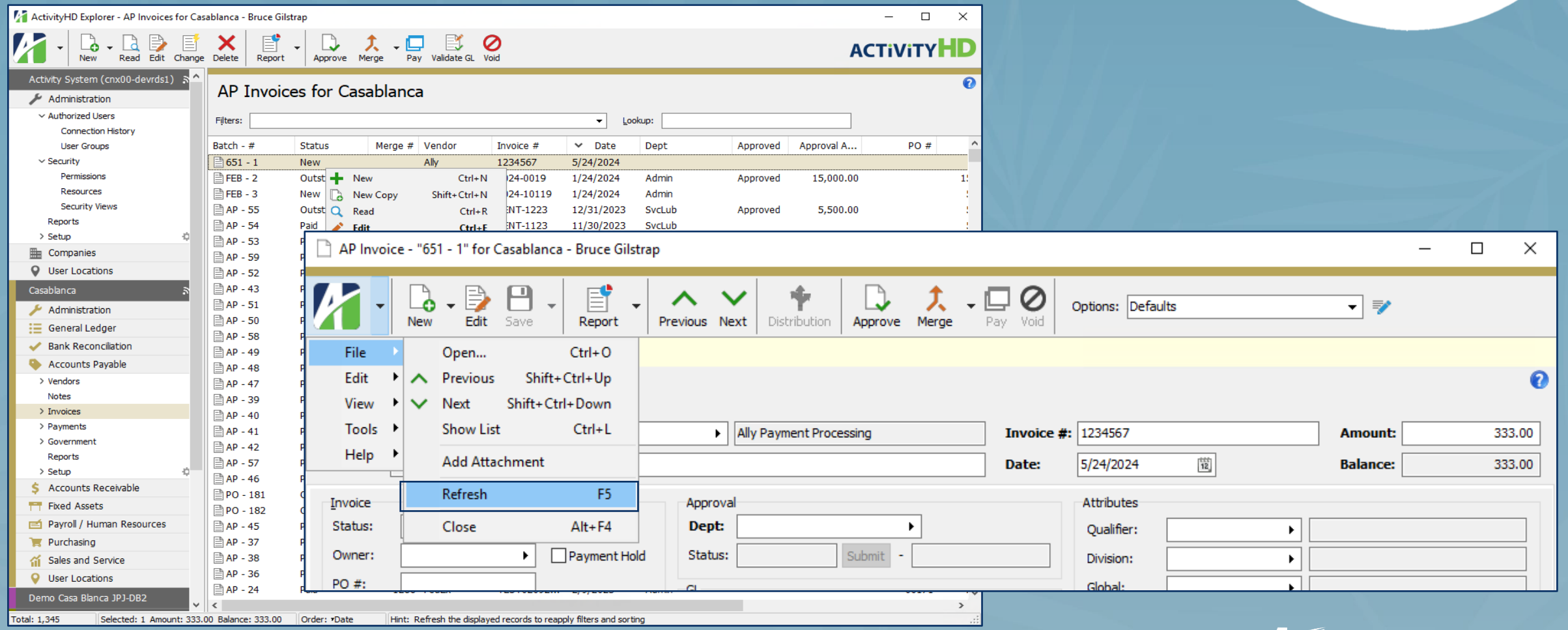
Refresh (F5)

new



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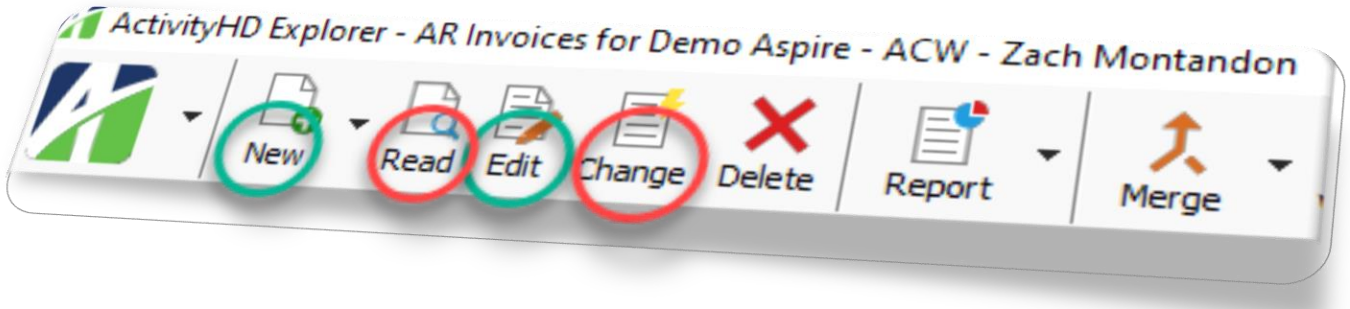
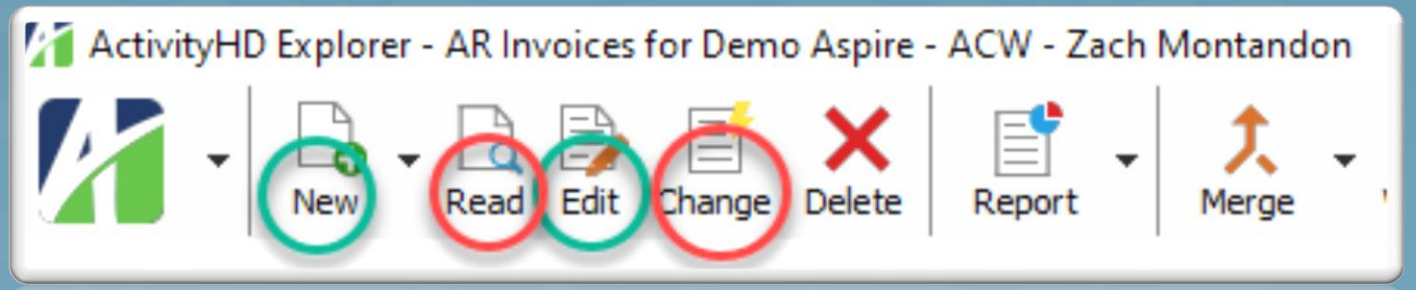
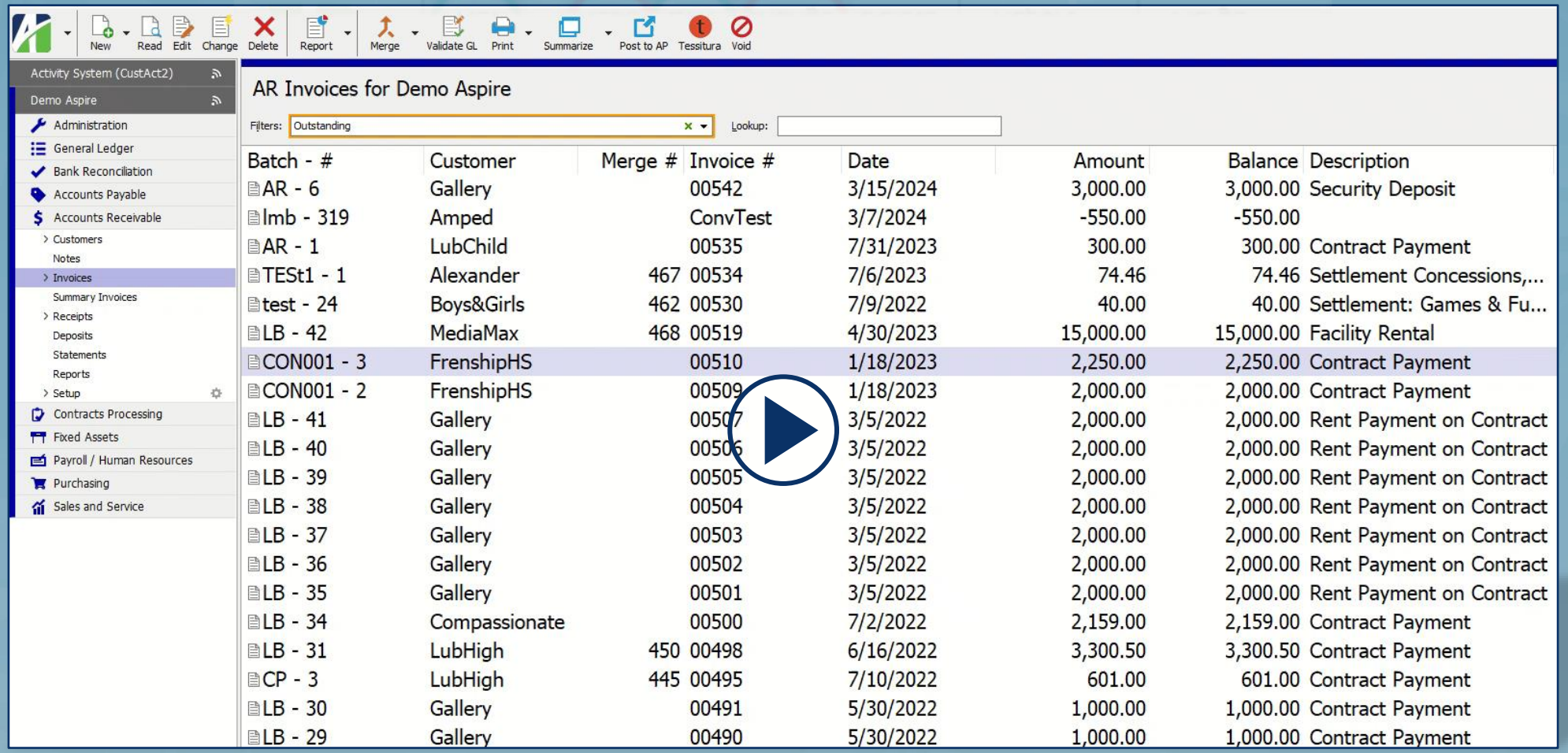
Tool Bar


ActivityHD Explorer - AR Invoices for Demo Aspire - ACW - Zach Montandon
New
Read
Edit
Change
Delete
Report
Merge





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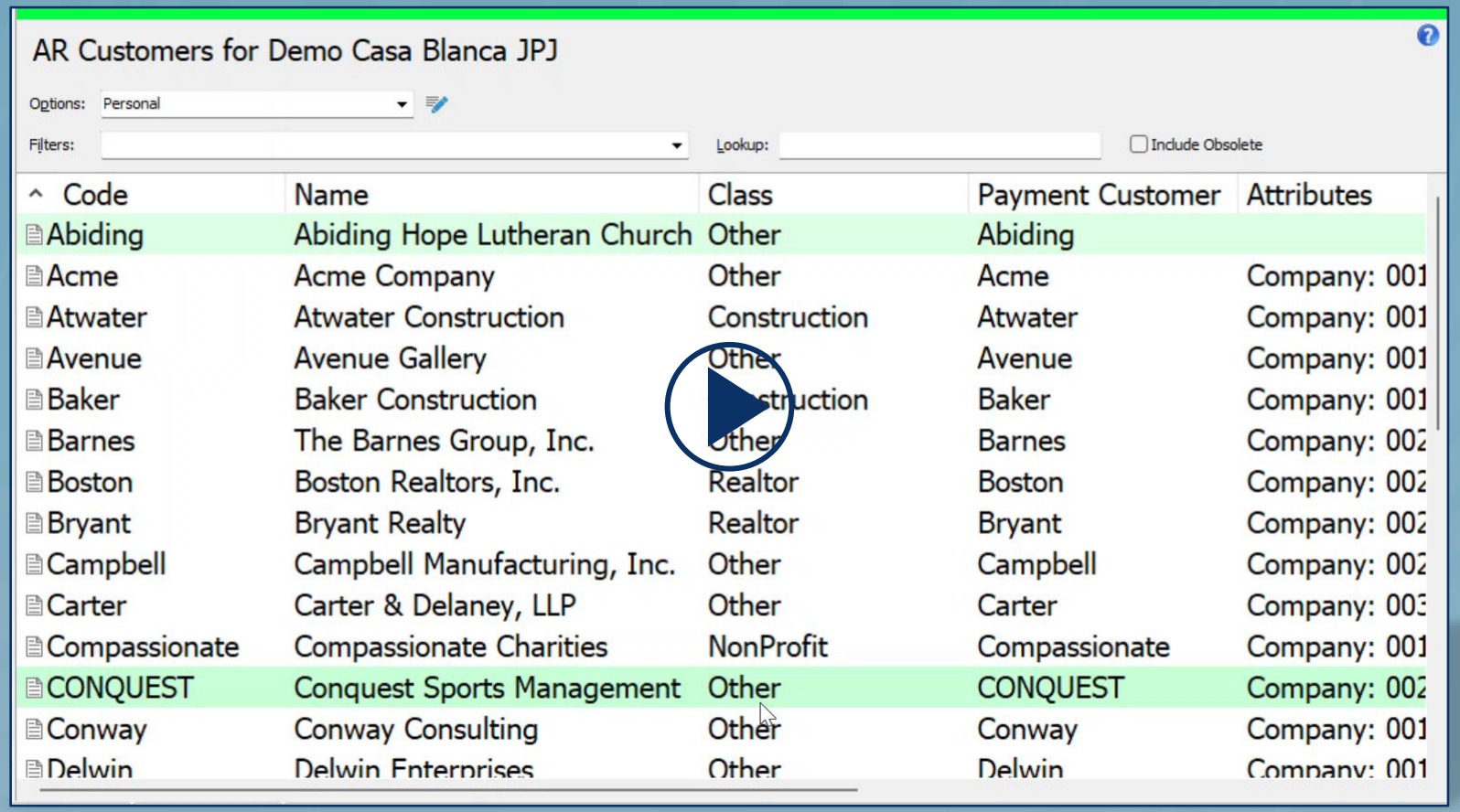
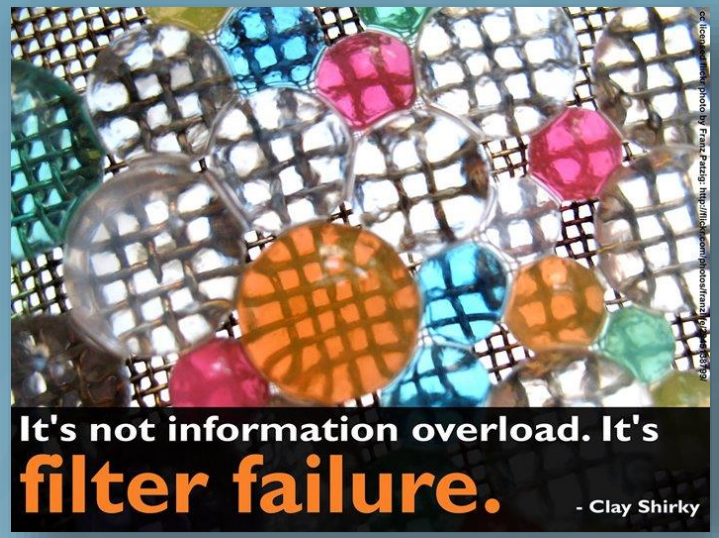
Filters and Lookup

Use filters, lookup, and column filters to locate specific records





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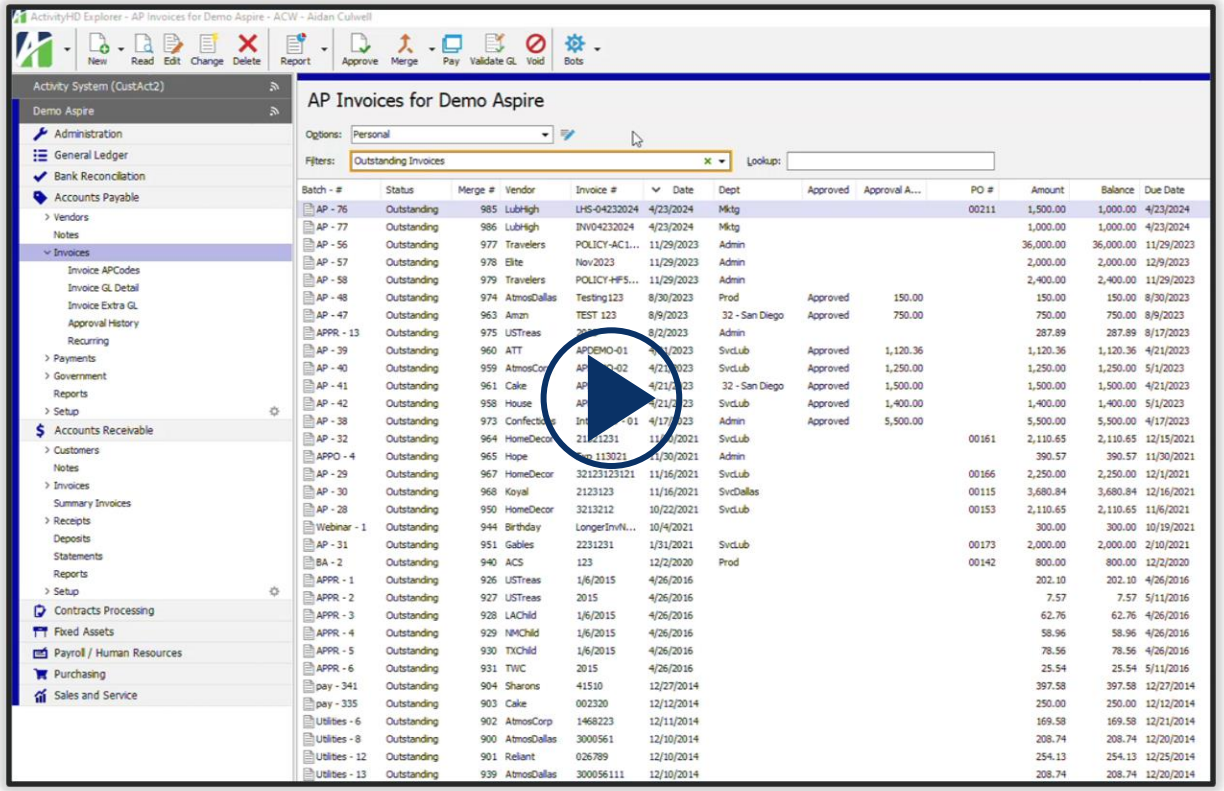
Saved Answers

Efficiency!

Remembered settings to prevent duplicate setup entry

- Process screens like paying invoices, printing invoices, processing time sheets, etc.
- Memorized report settings like customer and vendor aging, GL reports by rollup or attribute, etc.



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Display Options

View and Form

View Options: Hybrid of other Features

Filters

- Allows you to limit to specific data.

Column Settings

- Set the columns for a specific task or review.

Saved Answers

- Remember filters and columns with an answer to use next time.

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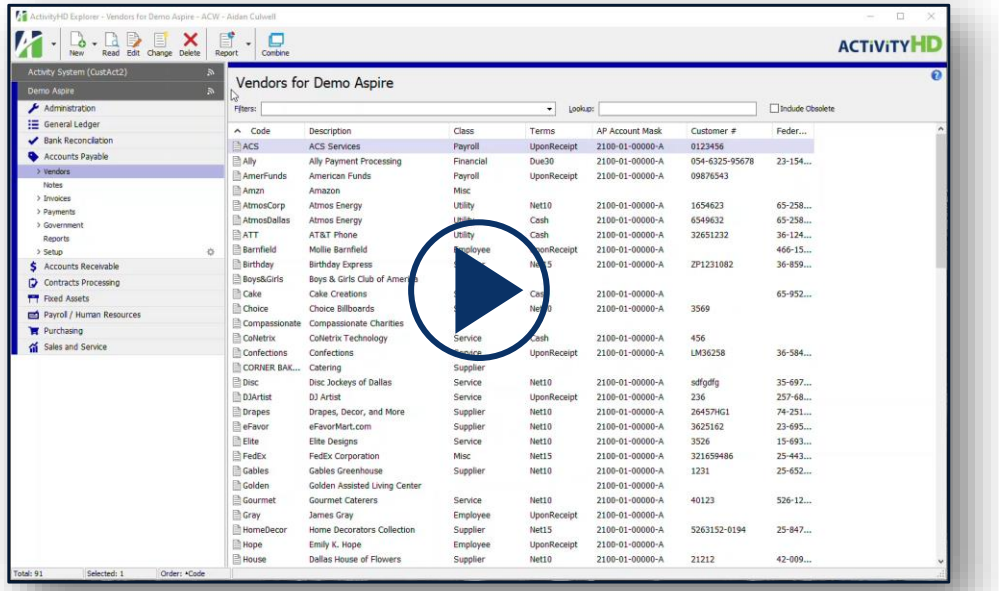
View Options

- Enable under View in file menu
- Creates new “Personal” saved answer with your previously saved settings
- Options can be shared among users for consistency



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Why use view options?

- Many of us “wear multiple hats” in our organizations
- Data displayed in the HDView needs to change as rapidly as your job description
- Processing – use options for stepping transactions through processing
- Analysis – use options to collect the data and then perform a call to action

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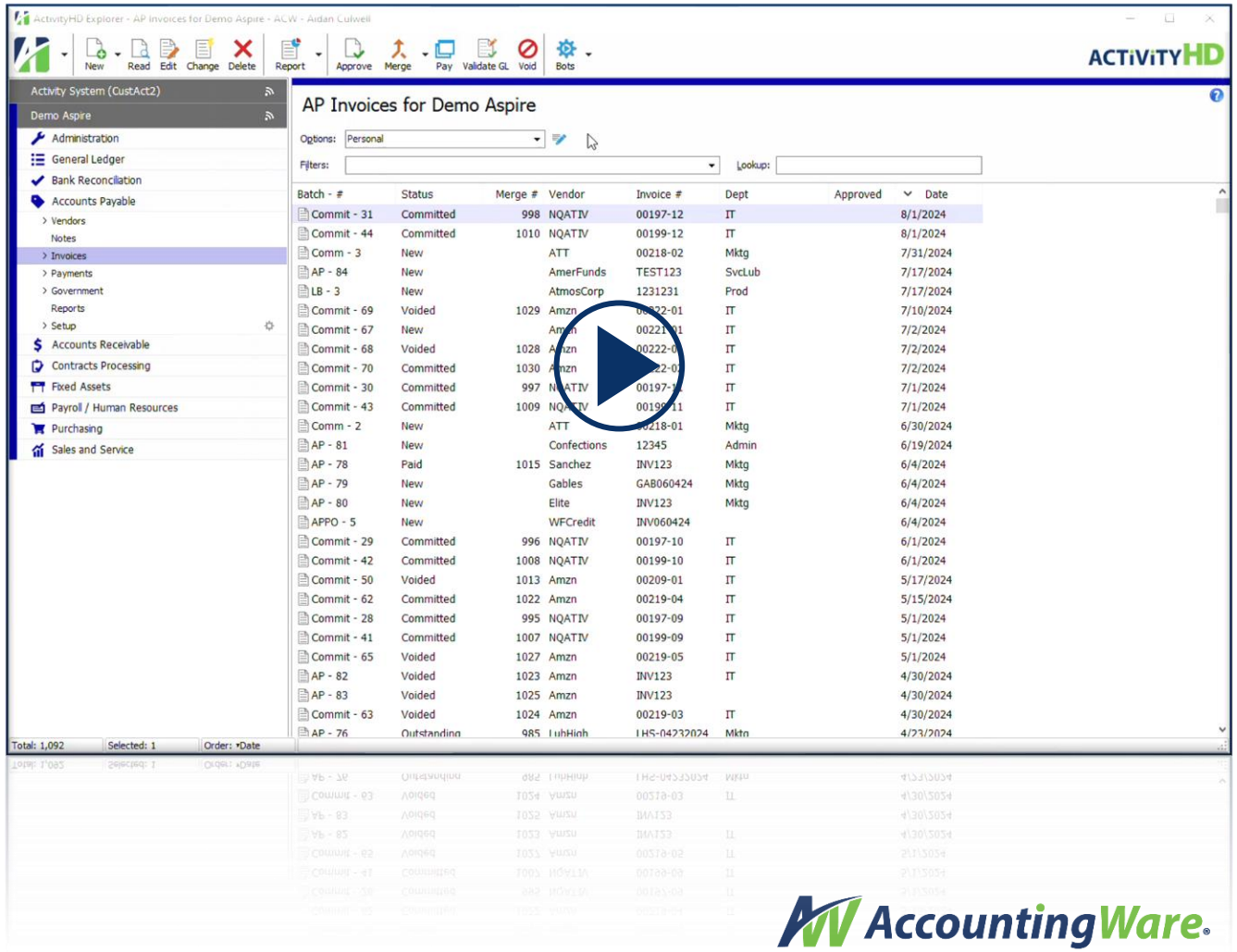
Processing Examples

- Invoice Entry
- Limit to unmerged
- Basic invoice information for proofing
- Limit to outstanding
- Remaining balances
- View available discounts and terms



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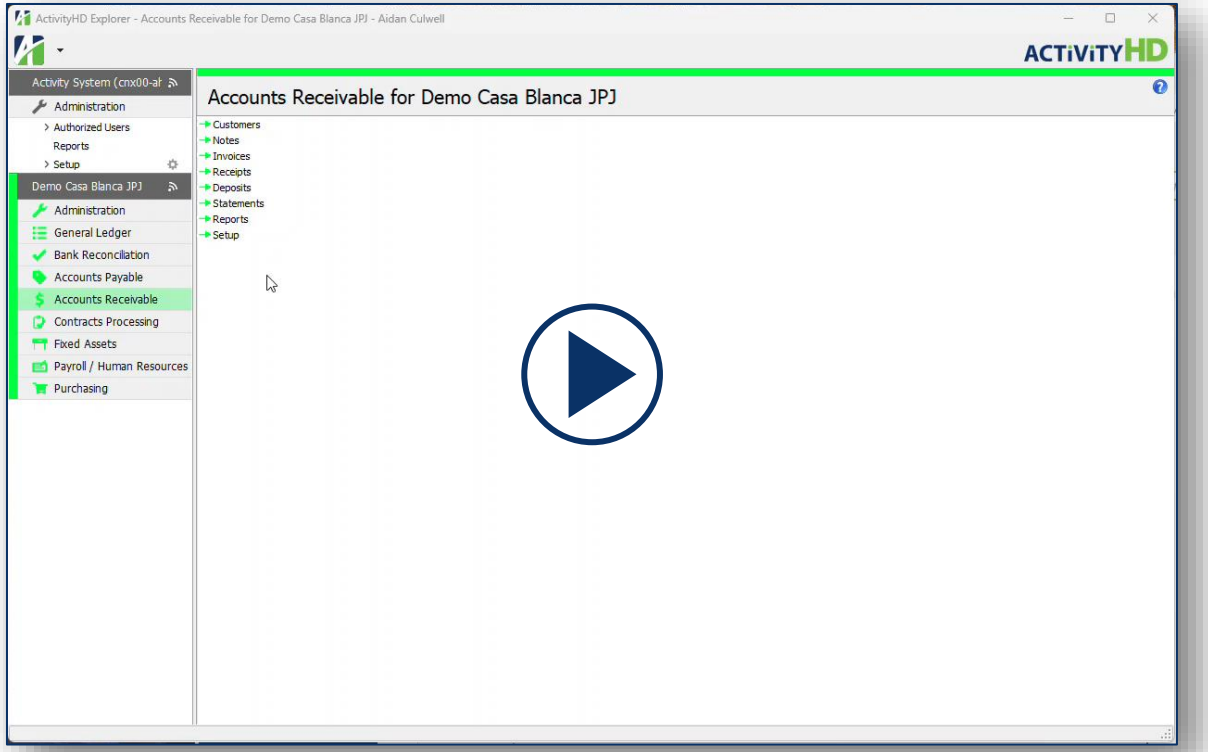
Analysis Examples

Customer Past Dues

- Past due balance
- Each of the aging category totals (over 30, 60, etc.)
- Open invoice count

Customer Collection List

- Address information
- Contact name, title, and phone number
- Past due balance



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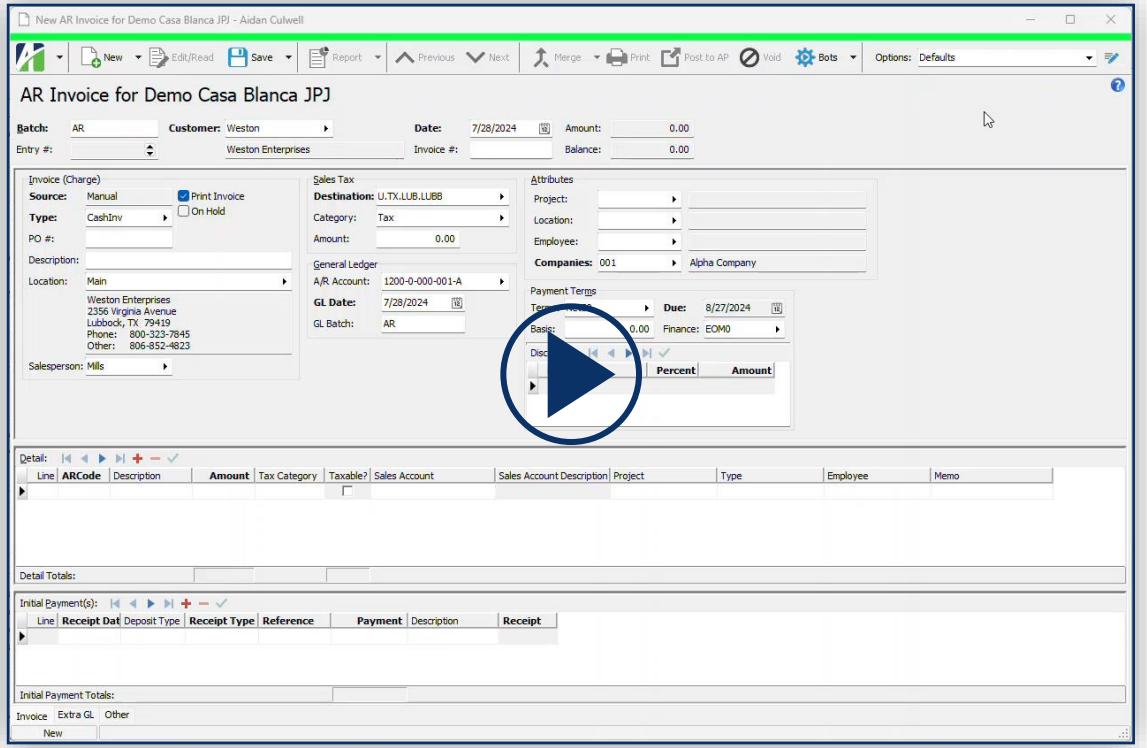
Form Options

- Available in Purchase Orders, A/R Receipts, A/R and A/P Invoices, and the JE forms
- Customize your forms
- Saves you time on your processes by making selections for you



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SUBMIT YOUR QUESTIONS!

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Next Session

General Ledger: Controller Workshop

Thursday, August 8
11:00 (CT)

Lori Bogart & Sarah Brewster

ALL SESSIONS

- Bruce and Grant's Excellent Unboxing Adventure
- Cybersecurity Essentials for Today's Internet Connected World
- Do More With Less: Publishing Financial Designs
- Back to Basics
- General Ledger: Controller Workshop
- The Right Tool for the Job: Automation
- Enhancing Purchasing: Boosting Visibility, Efficiency, and Commitments
- Attributes: Multi-Dimensional Accounting
- New Graphics Capabilities in ActivityHD
- Learning to Streamline Your Payroll Processes
- Mastering Contract Processing: Streamline, Optimize, Manage
- Payroll Problem-Solving: Become a Master of Troubleshooting

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Remember to complete the survey!

THANKS FOR JOINING

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Zach Montandon & Aidan Culwell
support@accountingware.com

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