

Accounts Dashboard

The Accounts Dashboard includes links to most accounting options, such as creating invoices and entering receipts. In addition, the accounts dashboard also displays a number of Pie Charts to allow you to visualise your account balances for a specific date range.

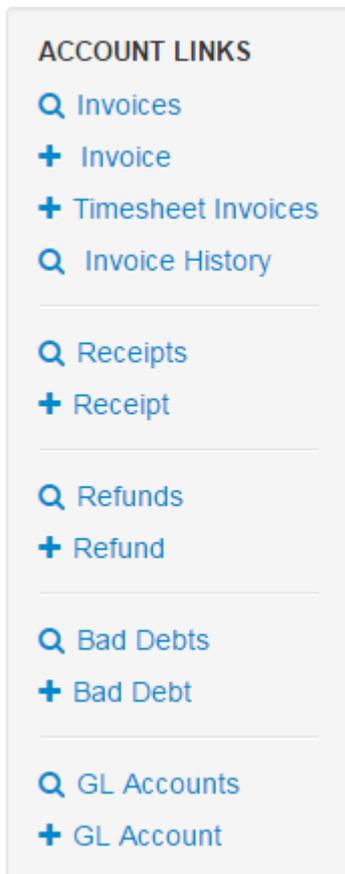
To display the Accounts Dashboard

Click “**Accounts**”

Click “**Dashboard**”

To display common account options

Click on the required link in the Account Links section to open a window for that option.



The  symbol in front of a link indicates you can view a list of transactions for that option.

The  symbol in front of a link indicates you can create a new transaction for that link.

NOTE:

The number of links displayed on your accounts dashboard may vary from the list above. Links will only appear for options that you have subscribed to or the features you have enabled, such as Invoicing.

Pie Charts

The number of pie charts displayed will vary depending on your subscription options. For example, if you have a Standard Subscription, you can view pie charts for:

- Transactions By Type
- Receipts by Parent
- Refunds by Parent
- Bad Debt Write Offs by Parent

The date range allows you to view the account balances in the pie charts for a specific period of time.

NOTE:

Account transactions are included in the account balances based on the date the transactions were actually entered into your accounts and not the date the transactions refer to.

To change the date range for the pie charts

Data From To

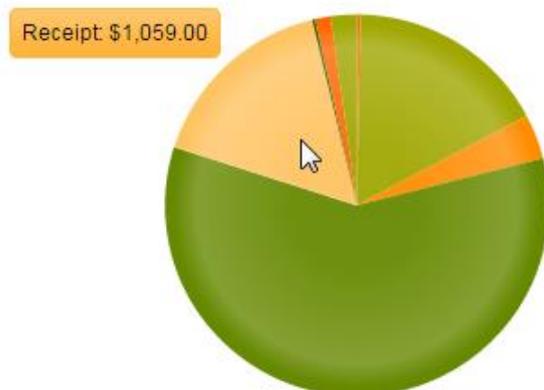
Click in the **“From Date”** to display the calendar and select a date

Click in the **“To Date”** to display the calendar and select a date

Click button to reload the data in the pie charts for the date range.

An example Transactions by Type pie chart will appear similar to the following example.

Transactions by Type



- Manual Balance Adjustment
- Attendance Subsidies
- Timesheet Levies
- Timesheet Fee
- Receipt
- Invoice
- Refund
- Bad Debt Write-Off

To display the balance for each slice

Hover the mouse over the pie chart and the balance for the specified date range for the slice pointed to by the mouse will be temporarily displayed in a bubble adjacent to the pie chart.

To highlight a slice of the pie

If you are having trouble identifying the slices of the pie, point to an entry in the legend and the slice in the pie chart associated with that entry will be highlighted.

To hide a slice of the pie chart

Click on the entry in the legend for the slice you wish to hide and the entry will be displayed in low intensity and the slice will be removed from the pie chart.

You can hide multiple slices if necessary.

■ Manual Balance Adjustment ■ Attendance Subsidies ■ Timesheet Levies
■ Timesheet Fee ■ Receipt ■ Invoice ■ Refund ■ Bad Debt Write-Off

In the legend above, the Invoice and Refund entries are displayed in low intensity indicating that their slices have been temporarily removed from the pie graph.

To show a hidden slice of the pie chart

Click on the dimmed entry in the legend for the slice you wish to show and the entry will be displayed in normal intensity and the slice will be displayed in the pie chart.