

**The Profile Bar:** To help you there is a Profile Bar at the top of every screen. Use this Profile Bar to switch between your Profiles.

**1** Your profile **My Profile**   **You have 70 transactions to code**

To change the Profile you are viewing, select from the dropdown list.

You can add a new Profile at any time.

To edit your Profile, e.g add an account or change the Profile's name click on "Edit".

Use this button to navigate to the Coding transactions page.

This shows how many transactions have not been categorised over the past Month for this Profile.

**2** **Cash Position** **High & Lows**

90 Day Average Balance \$50,000

From Date: 30 Jan 09 To Date: 29 Sep 09   Week  Month  Quarter

The combined average balances of all your accounts under your Profile. This excludes credit cards. [Find out more.](#)

Click on the tabs to view different graphs and information on your Profile and the accounts in that Profile.

Click on the "View Demo" tab to view a demo on the Dashboard.

Click on "Help" to view help on the Dashboard

Click on "Export" to export the information in the graphs to a spreadsheet program, allowing you to save your information.

Use the date range finder to select a date range you want to view and then click on "GO". This allows you to set the date parameters of your graphs.

You can view your date selection by week, month or quarter. You can see up to 13 weeks, 13 months or 8 quarters.

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**Dashboard**

The Dashboard gives you a snapshot of the financial position of the accounts in your Profiles. It's a useful visual reference to check your cash flow. Descriptions for the different snapshots are found above each table or graph.

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Total Account Balances  Total Account Balances Last Year  
 Total Current Credit Limits  Trend (average over last 12 months)

Click on "Print" to print the information in the graphs. The graphs that are visible will print so you will need to have the right tab selected first.

Tick boxes allow you to show additional information on the Cash Position graph.