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» Configure / Summary of Balances

What can I find on this page?

On this page, you can set the view of the Balance Summary to be displayed when you enter **Banca**Net Empresarial.

Note: If it is the first time you set your Balance Summary view, **Banca**Net Empresarial will inform you that there are no selected accounts.

How can I obtain the information I am interested in?

The page consists of the following sections:

Selection of action:

This section consists of three options:

- Create a new view
  - This option enables you to create new views of Balance Summary; just follow this instructions:
  - Click *Create new view.*
  - Register the name of the view.
  - Choose the Account type from the Accounts selection list.
  - Click "Search", which Displays a list of all the accounts according to the account type you previously selected.
  - The account list Displays the following information of the account:
    - Name of the account
    - Branch
    - Account number
    - Button "Add" : Clicking it will enable to add the accounts to the segment Current view.
  - In the segment Current view can be displayed down to 50 accounts. As you add accounts, the meter, which is located on the upper right side of this section, will increase its number. In case you have not selected any account, "0/50" will be displayed by default. This section Displays the following information of the account:
    - Name of the account
    - Branch
    - Account number
    - Button "Remove" : Clicking it will enable you to eliminate the selected accounts from the segment Current view.
  - Click "Save", a window will be displayed informing you that the Balance summary has been successfully saved.

- Query/Modify existing view.
  - This option enables you to query and modify an existing view. To modify a view or Balance Summary follow this instructions:
  - Click Query/Modify existing view.
  - Choose from the stored Views selection, the view you want to modify.
  - Click "Select"; a list of the accounts that your view or balance summary contains will be displayed.
  - The account list Displays the following information of the account:
    - Name of the account
    - Branch
    - Account number
    - Button "Remove" : Clicking it will enable you to eliminate the selected accounts from the segment Current view.
  - To add accounts to your *Existing view*, follow these instructions:
    - Choose the Account type from the Accounts selection list.
    - Click "Search", which Displays a list of all the accounts according to the account type you previously selected.
    - The account list Displays the following information of the account:
      - Name of the account
      - Branch
      - Account number
      - Button "Add" : by clicking on it, you are enabled to add accounts to the segment Current view.
  - In the segment Current view can be displayed down to 50 accounts. As you add accounts, the meter, located on the upper right side of this segment, will increase its number; in case you have not selected any account, "0/50" will be displayed by default.
  - Click "Save"; a window will be displayed informing you that the changes to Current view have been successfully saved.

- Erase view
  - This option enables you to eliminate an existing view. To eliminate a view or Balance Summary follow this instructions:
    - Click "Erase view"
    - Choose the view you want to eliminate from the *Stored views* selection.
    - Click "Erase view"; a window will be displayed asking you to confirm the elimination of the view.