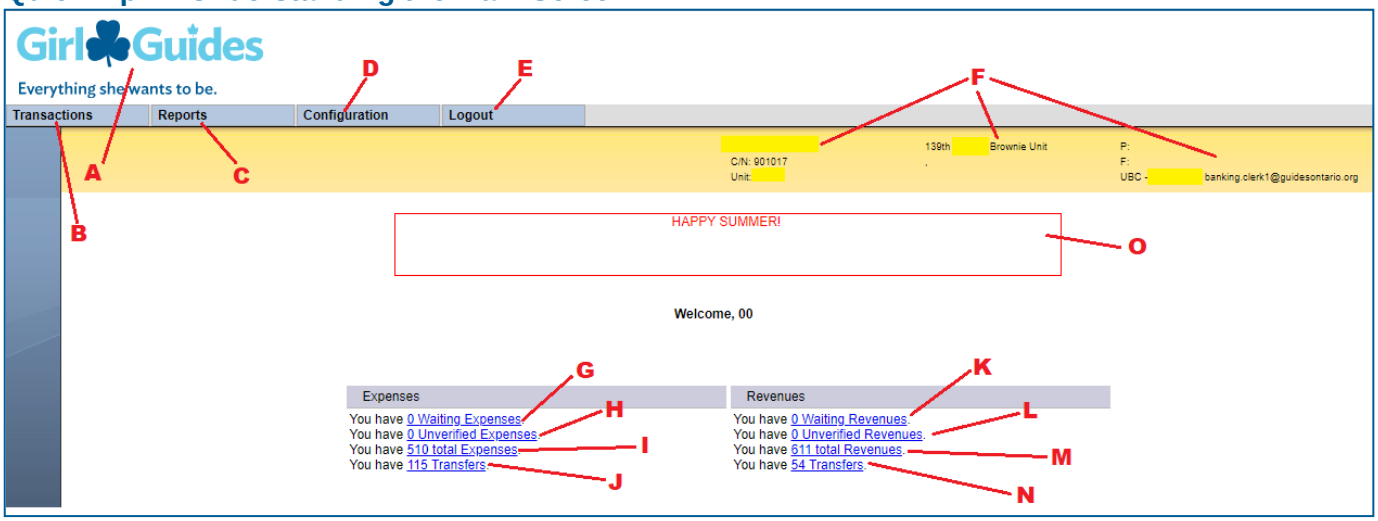
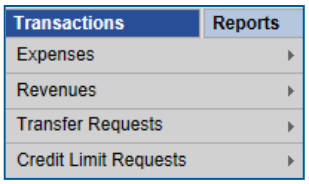
Quick Tip 2 - Understanding the Main Screen

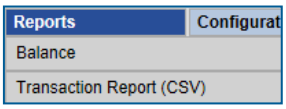


A **Trefoil Logo**: Click on the logo in the top left corner of the browser at any time, to return to the Main Screen.

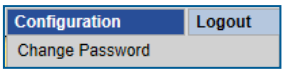
B **Transactions**: Hover your cursor over this heading to:
(1) Expenses: **View Outstanding** Expenses (same as G), **New** to create a manual expense or **View All** to see total expenses (same as I)
(2) Revenues: **View Outstanding** Revenues (same as K) or **View All** to see total revenues (same as M)
(3) Transfer Requests: **View Outstanding** allows you to see any transfers you have created that have not yet been approved by Province or **New** to create a transfer of funds to another unit or to Province.
(4) Credit Limit Requests: **New** to fill out an increase of credit for your unit's purchase card.



C **Reports**: Hover your cursor over this heading and click on **Balance** to run the balance report (see **Quick Tip 9**). To run a **Transaction Report (CSV)**, choose the dates and select either expenses or revenues and then export (see **Quick Tip 22**)



D **Configuration**: Hover your cursor over this heading and click on **Change Password** to change your password.



E **Logout**: Click this button to exit your Unit Banking account and return to the Login Screen.

F **Unit Information**: Provides information about the Unit Treasurer, Community Number (C/N), Unit Number, Unit Name and Unit Banking Clerk contact email.

G & K **Waiting Expenses and Revenues**: Click the underlined text to access a list of expense or revenue transactions that require your allocation. These transactions require you to select the distribution or category (e.g. spring (sandwich) cookies, dues, special events) and to input tax amounts if applicable.

H & L **Unverified Expenses and Revenues**: Click the underlined text to access a list of expense or revenue transactions that require your review and re-submission. Your Unit Banking Clerk has identified a problem with these transactions and you will need to make changes accordingly and resubmit or delete the transaction.

I & M **Total Expenses and Revenues**: Click the underlined text to access a list of all expense or revenue transactions. You can also access these lists by looking under the **Transactions** menu (See B).

J & N **Transfers**: Click the underlined text to access a list of all the completed expenses or revenue transfers.

O Messages from Ontario Council Unit Banking