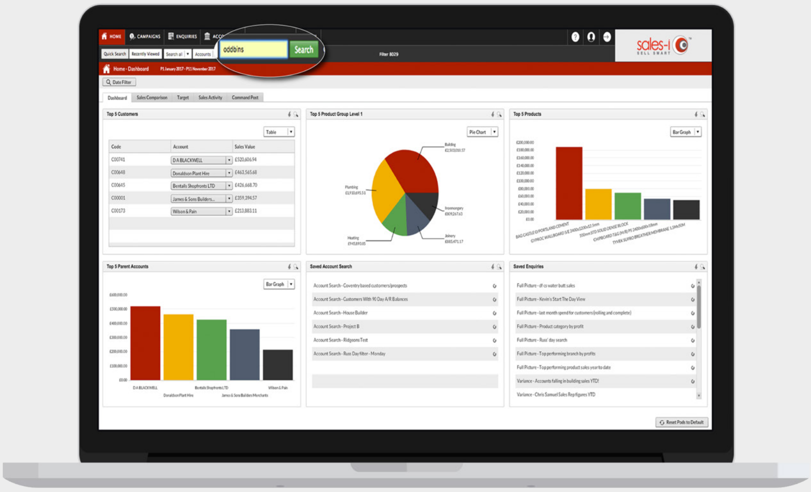
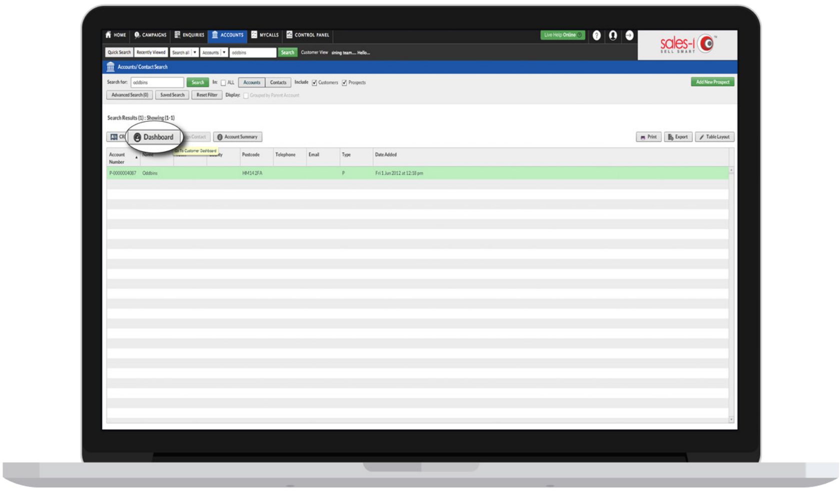
HOW TO CUSTOMIZE YOUR SNAPSHOT REPORTS

This guide will teach you how to tailor your Snapshot report so that you only see the things you need to see, learn how to change labels, add transaction analysis and save configurations for the future.

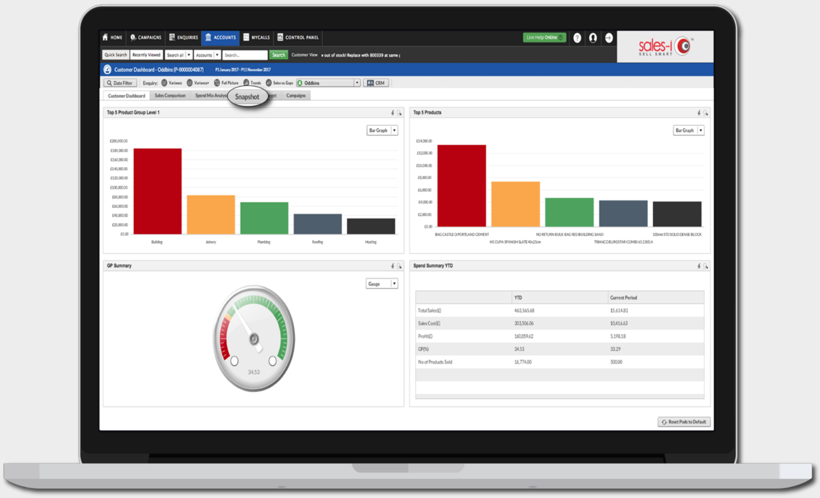
01 In the Search bar at the top of the home screen, enter the name of the account that you wish to alter a snapshot report for and click **Search**.

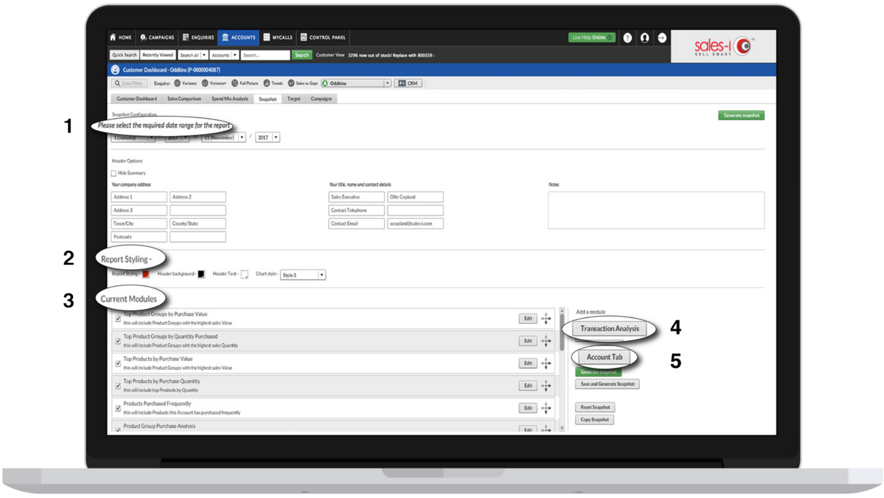




02 Select the correct account so that it turns green and then click **Dashboard**.

03 Click the **Snapshot** tab.

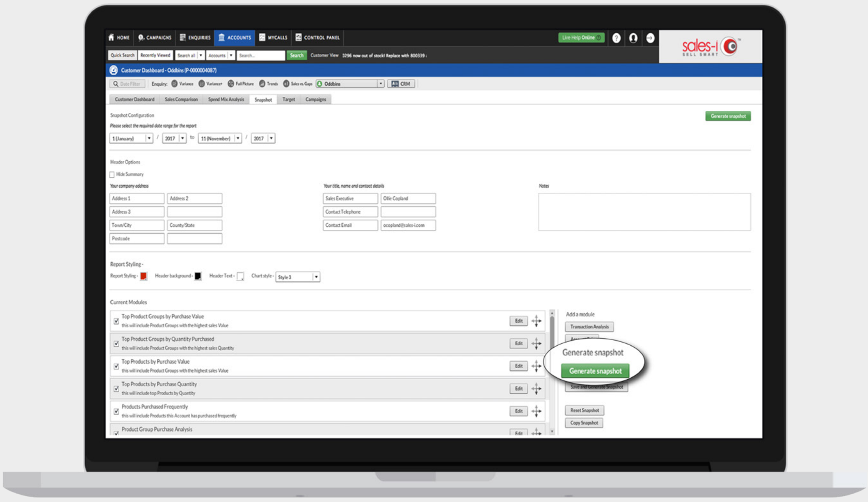


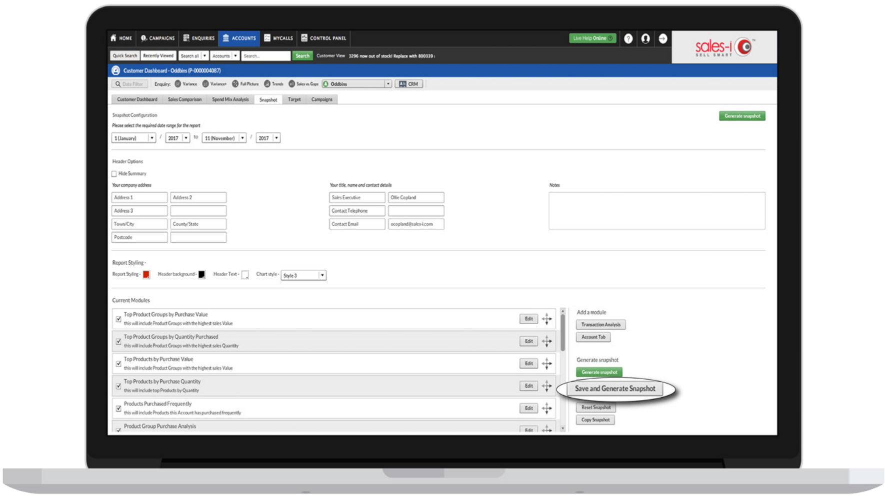


04 Adjust the report using the following options:

1. **The required date range**
2. **Report Styling**
3. **Current Modules** - information that's included
4. **Transaction Analysis** - module for a financial breakdown report
5. **Account Tab** - module for account information

05 You can then choose to either, generate the report as a one off using **Generate Snapshot** or...





06 Alternatively, you can choose **Save and Generate Snapshot**, which will save these settings for all of your reports.

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