Quick Guide

UC eBanking global

Filtering, sorting and customisation of views

UniCredit

GENERAL INFORMATION

This Quick Guide, elaborates on how to set filters, sort specific data and customise views to suit your needs.
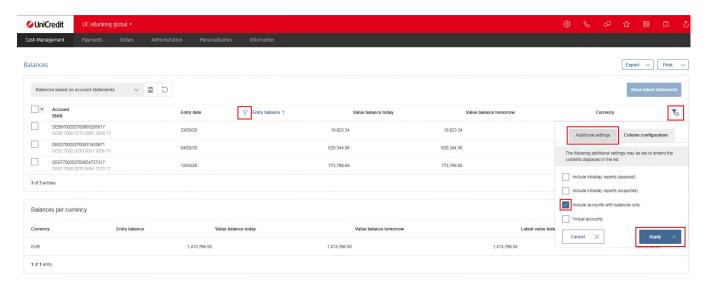
CONDITIONS

Successful Login in to UC eBanking global.

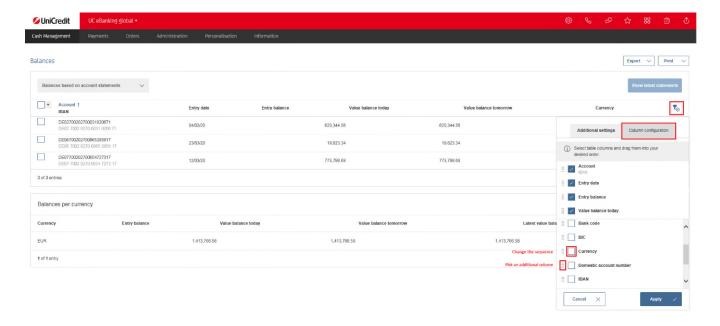## FILTERING, SORTING AND CUSTOMISATION OF VIEWS

You can customise your view by using certain criteria or filters. To do this, click on the "Set filter" icon/button.

Through "additional settings", from a drop down list, you can choose the contents to be displayed. By clicking "Apply" the settings will be confirmed and saved.
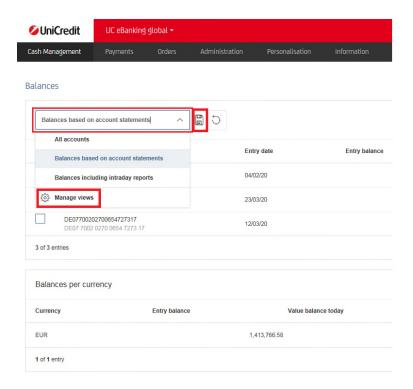
Using the "configure columns" button, you can add further columns, or hide existing ones. By clicking the box it will be ticked, or unticked and the change will be saved. You can move the columns by clicking on one and dragging it above or below in the view window.
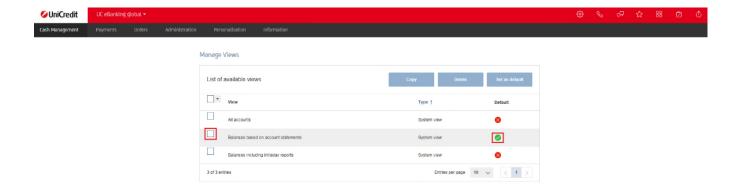
To activate the setting click "Apply".

SAVING THE VIEWS AND "SETTING AS DEFAULT"

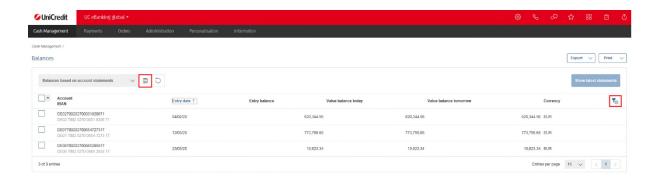In the View-Selection box, you can choose and manage different view types.

Should you need to use a different Standard-View, you can change it under "Manage Views".
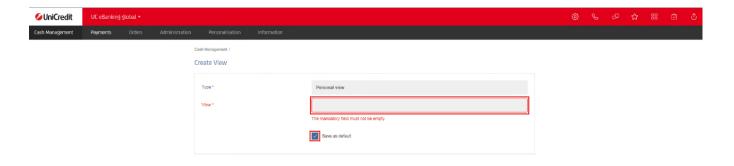
Personalised views, set according your needs, also will be saved and managed in this area.

As soon as you change a view, for example by selecting a filter, a "Save" button will appear next to the view selection. By clicking on it the personalised view will be saved.
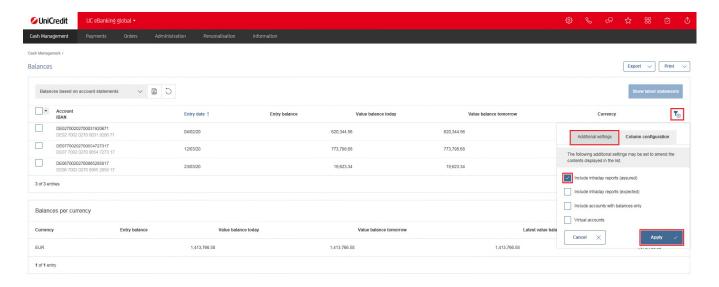

When you click on "Type and "View", you can set descriptive names. They are mandatory and need to be filled, otherwise you will not be able to progress. Continue to tick the box "Save as default" and click the "Save" button.
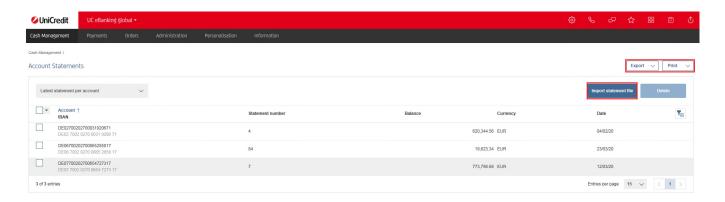
"ADDITIONAL SETTINGS" IN THE CASH MANAGEMENT SECTION

In the Cash Management section you can also access additional settings. For example in the Account statements you can select the option to "Include assured intraday reports", to list only defined statements.

In the "Account Statements" tab you can also import, as well as delete, the account statements. When using the "delete" function the statements will be deleted for all users within your client access. Please be advised that this data cannot be restored afterwards!

Using the panes "Export" and "Print" you can download or print your data. Chosen rows can also be individually downloaded or printed. The above described process can be used similarly in all menu items.