Company Snapshot overview

Use the Company Snapshot to get real-time company information and perform tasks from a single place.

To open the Company Snapshot, go to the **Company** menu and click **Company Snapshot**.

Depending on your access permissions, you can add any of the following content.

- Income and Expense Trend

  This section shows money going in and out of your business over time. It gives you a quick snapshot of how your business is doing and lets you compare monthly income and expenses.

  - The default graph view is year-to-date. You can change the date range by clicking the drop-down arrow.
  - Place your pointer on any bar in the graph to see the total for that bar, then right-click to see a breakdown.
  - Double-click any bar in the graph to view its detail in the Report Center.

- Prev Year Income Comparison

  This section shows how much money you're making this year compared to previous years for any or all accounts. You can view monthly, quarterly, weekly, or yearly comparisons.

  - The default account selection is all accounts. You can change the account by clicking the drop-down arrow.
  - The default graph view is yearly. You can change the date range by clicking the drop-down arrow.
  - Place your pointer on any bar in the graph to see the total for that bar.
  - Double-click any bar to view its detail in the Report Center.

- Account Balances

  This section shows all bank, accounts receivable, accounts payable, credit card, asset, liability, and equity accounts. You can add other accounts by clicking **Select Accounts**.

  - Sort any column by clicking the column header.
  - Double-click a balance sheet account to open its register window; double-click an income or expense account to open its report.
  - Click the **Go to Chart of Accounts** link to open the **Chart of Accounts** window.
  - Click the **Select Accounts** link to select which accounts to show.

- Top Customers by Sales

  This section shows who your top five customers are based on sales for a given period of time.

  - The default graph view is year-to-date. You can change the date range by clicking the drop-down arrow.
  - Place your pointer on any bar in the graph to see the total for that bar.
  - Double-click any bar in the graph to view its detail in the Report Center.

- Customers Who Owe Money

  This section shows balances owed by customers.

  - The amount due is the total ending balance for that customer.
  - The due date shown is the earliest due date for all open invoices and statement charges for that customer.
  - The default view is sorted by due date. Overdue items are noted in red.
  - Sort any column by clicking the column header.
  - Double-click a line item to view the Customer Open Balance report and see transactions for a particular customer.
  - Click the **Receive Payments** link to open the **Receive Payments** window.

- More content

Double-click any reminder, account, customer, or vendor to view details and perform tasks.

You can:

- Add content and customise this page
- Set this as your opening page

1. Open the Company Snapshot.
2. Go to the **Edit** menu and click **Preferences**.
3. In the **Preferences** window, click **Desktop View** in the list on the left.
4. Click the **My Preferences** tab and then click **Save current desktop**.
5. Uncheck the option that reads **Show Home page when opening company file**.
6. Click **OK**.

- Print the entire snapshot, or a single panel
- Choose which accounts and reminders you want to see

  - Click the **Select Accounts** link to select the **Accounts Balances** you want to see.
  - Click the **Set Preferences** link to select the **Reminders** you want to see.

- Receive payments

Select a customer from the list and click the **Receive Payments** link to open the **Receive Payments** window.

- Pay bills

Click the **Pay Bills** link to open the **Pay Bills** window and select one or more vendors from the checklist.

Common questions:

- Why do I need permission to view this area?

You can only view those areas of Reckon Accounts to which you've been granted access. Contact your Reckon Accounts Administrator if you need to change your permissions.

- How do I prevent other users from seeing sensitive company data?

Users can only see data for areas they have been given access permissions to view. For example, if you have restricted a user from paying company bills, they will not be able to see the Vendors to Pay section in their snapshot. Find out more about how user permissions work, or change a user's permissions.

- If I customise this page, will other users see the same changes?

No. The Company Snapshot is customised for each individual user. The content you add, move, or remove is only for you. No one else can see your personalised snapshot.

See also

- Customise a Snapshot
- Payments Snapshot overview
- Customer Snapshot overview
- Content you can add to your Company Snapshot