

Outbank Helpdesk

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How can i use the new Reporting in Outbank?

Christine - 2018-07-25 - in Reports

The new Reports shows the Incomings and Outgoings as a pie chart. Every Category has sub-categories. Manual tags are shown separately.

- Dashboard: Here you see the areas 'Outgoing' and 'Incoming', which base on the rules for the Categories. If you click on one of these areas, you will see the categories for the Incoming or Outgoing transactions. Transfers are not included in this graphics.

If you see transfers, that are not recognized correctly you can change the category manually:

- on iOS: select the transaction either from the reports or in the list of transactions > with a swipe to the left you can change the category
- on macOS: please select the transaction from the list of transaction - at the moment you cannot change the category from the reports directly > open the transaction details and change the category
- Pie Chart: Additionally to the list of transactions for the Categories and Sub-Categories you see the the Outgoing and Incoming as a Pie Chart.
- Manual Tags are shown in the separate area of 'Tags'. Transfers are still included here.
- Time period: you can select the time period you want to see for the report in every view of the report. You can choose between: Monthly, Mid-Monthly, Quaterly, Annually
- Even if you disabled the Categorization in the settings, the report for the Outgoings and Incomings are visible. The transactions are assigned to the appropriate categories in the background on your device.