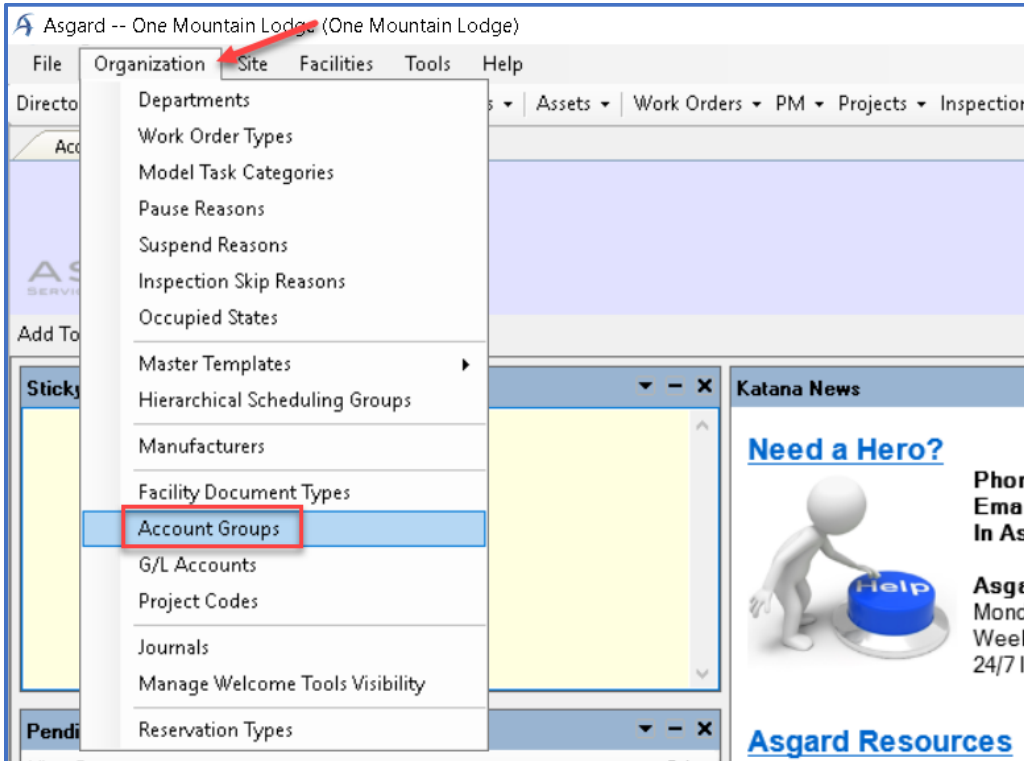


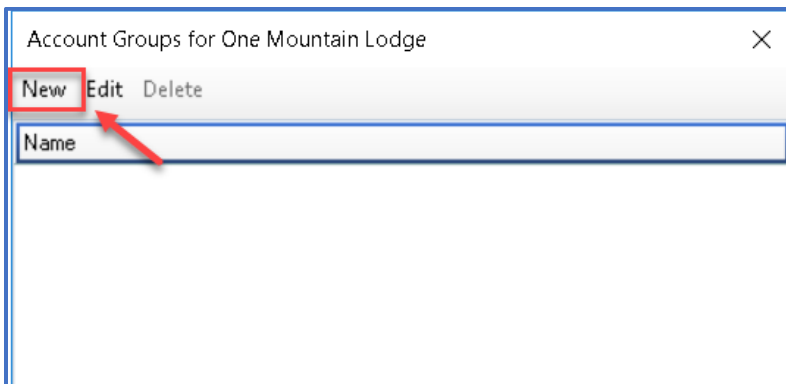
Creating Account Groups

Account Groups allow you to link multiple accounts together in Asgard in order to view them as a single, consolidated group for purposes of budget management and reporting.

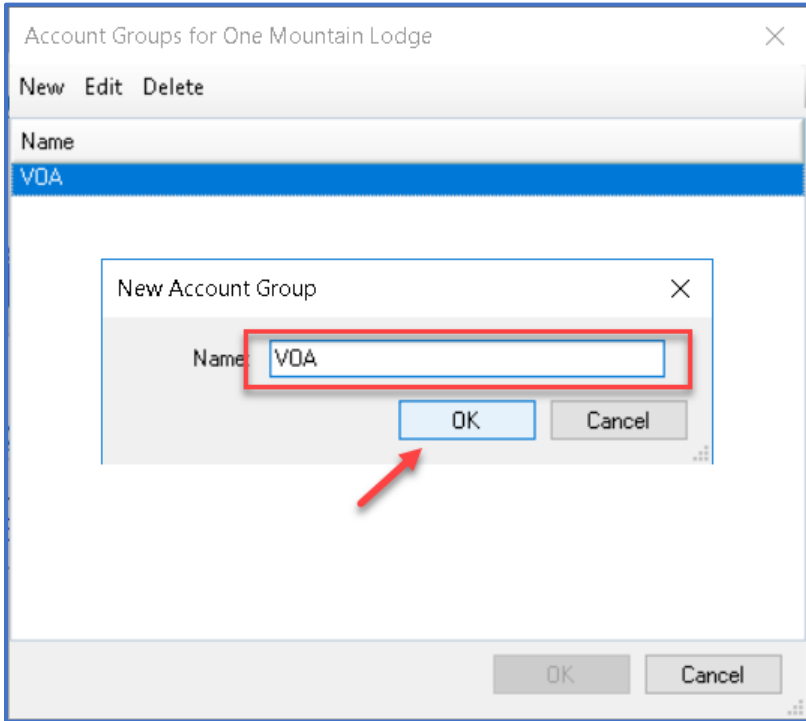
Step 1: Open the Organization drop down menu and select Account Groups.



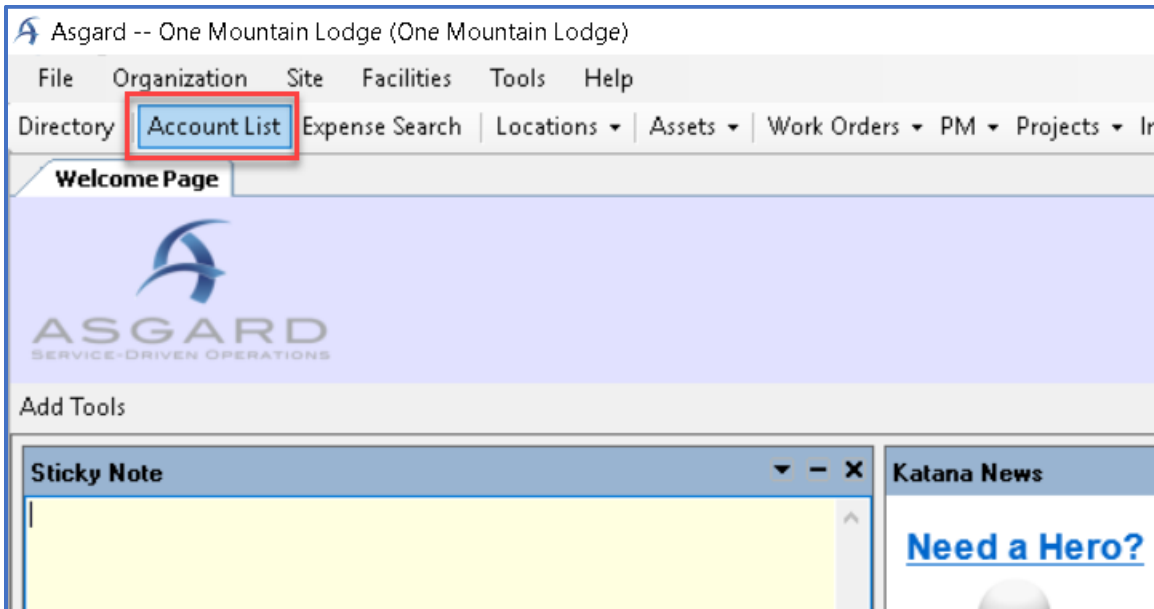
Step 2: Select New from the upper left-hand corner.



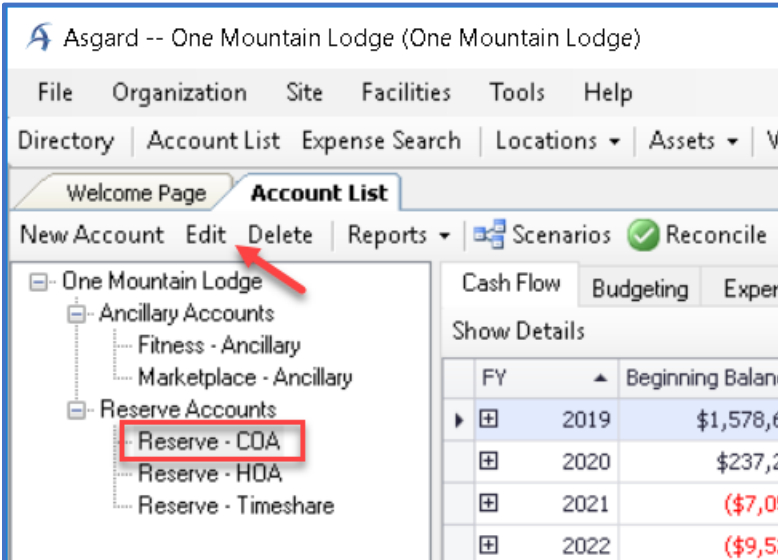
Step 3: Enter the name of the new Account Group. Click OK to save the name and click OK to close the Account Groups dialogue box.



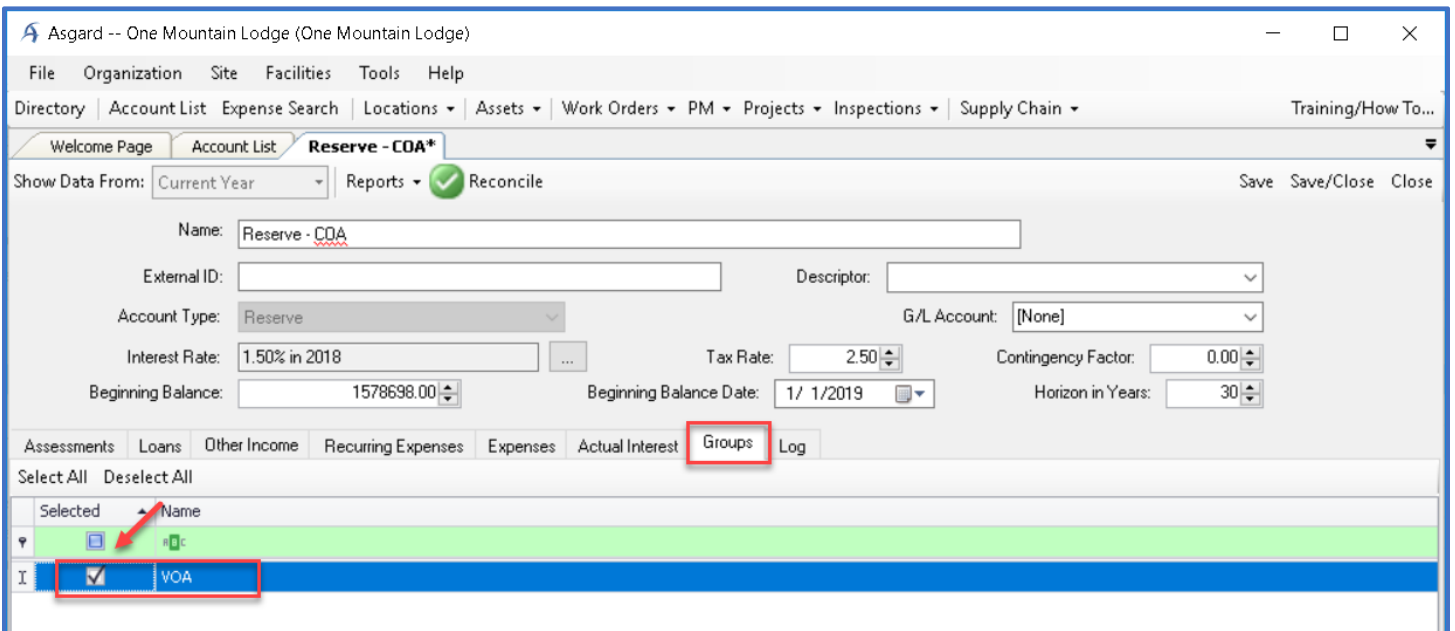
Step 4: Open the Account List screen by selecting Account List from the toolbar.



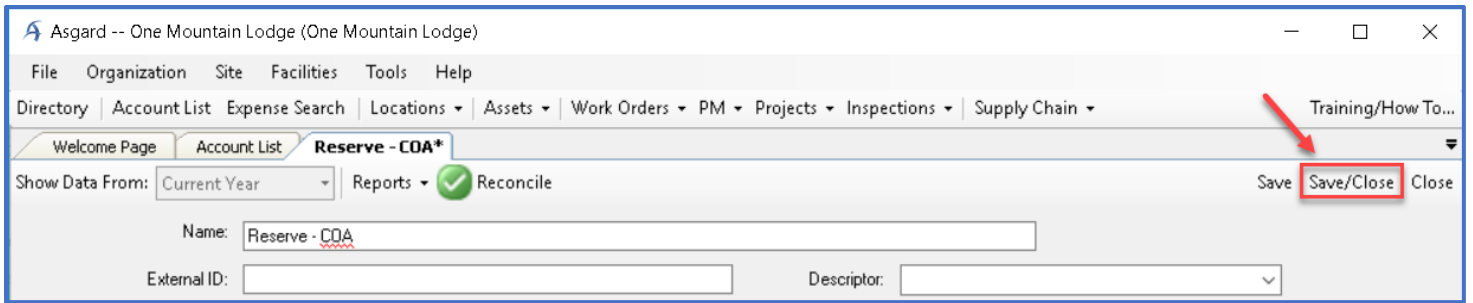
Step 5: Open the Reserve Account you would like to add to the new Account Group by double-clicking the name, or highlighting and selecting Edit from the toolbar above the list of Accounts.



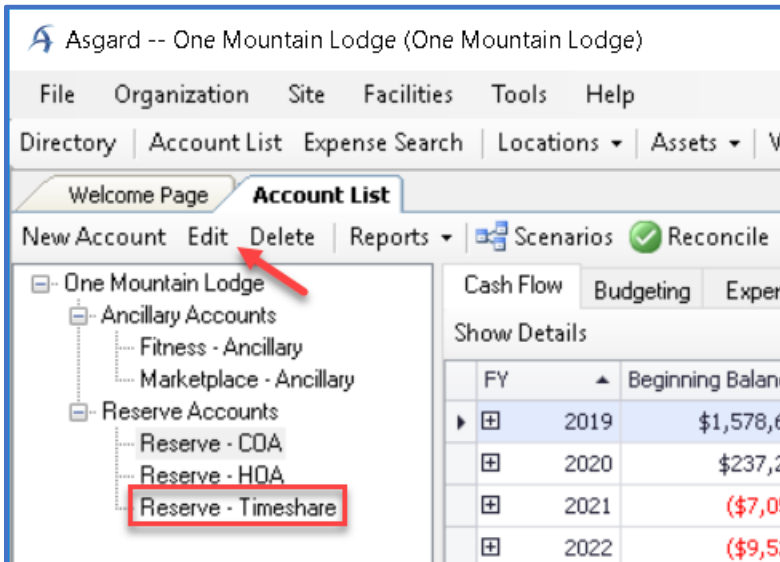
Step 6: Select the Groups tab from the lower portion of the Account Details window. Then select the box next to the new Account Group name.



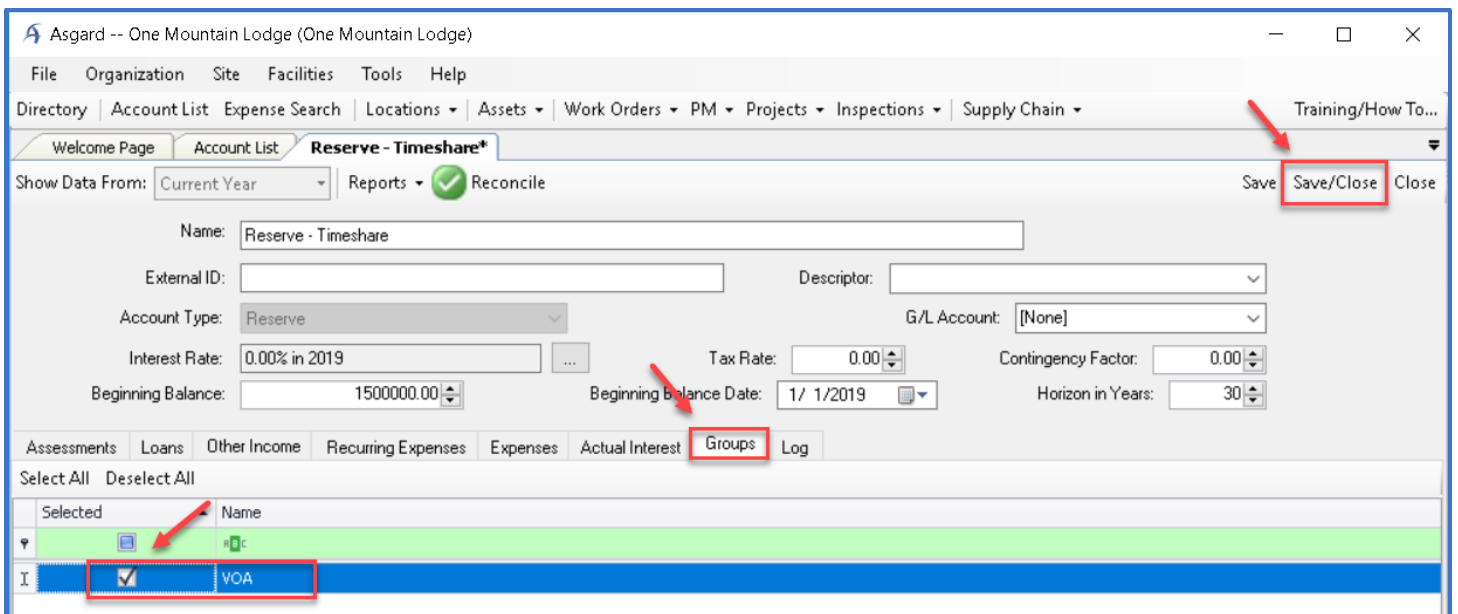
Step 7: Click Save/Close in the upper right-hand corner.



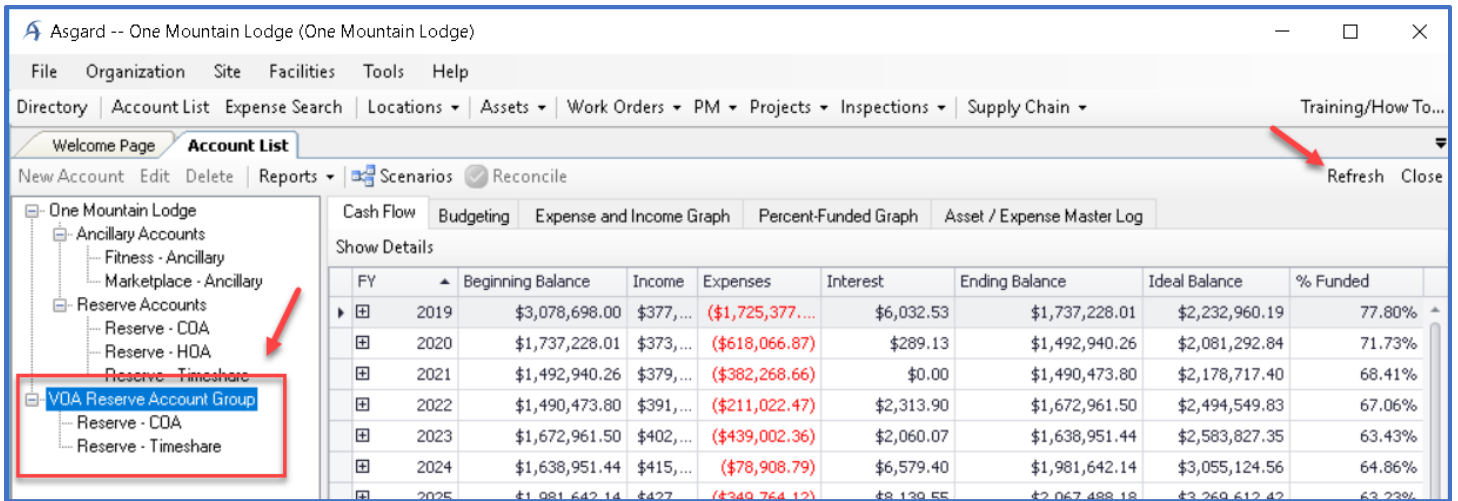
Step 8: Open the other Account you would like added to the Account Group by double-clicking, or highlighting and selecting Edit from the toolbar above the list of Accounts.



Step 9: Repeat Steps 6-7 in the Account Details window to link the Account to the new Account Group.



Step 10: Your new Account Group will appear on the Account List page. You may have to hit Refresh.



FY	Beginning Balance	Income	Expenses	Interest	Ending Balance	Ideal Balance	% Funded
2019	\$3,078,698.00	\$377,...	(\$1,725,377....	\$6,032.53	\$1,737,228.01	\$2,232,960.19	77.80%
2020	\$1,737,228.01	\$373,...	(\$618,066.87)	\$289.13	\$1,492,940.26	\$2,081,292.84	71.73%
2021	\$1,492,940.26	\$379,...	(\$382,268.66)	\$0.00	\$1,490,473.80	\$2,178,717.40	68.41%
2022	\$1,490,473.80	\$391,...	(\$211,022.47)	\$2,313.90	\$1,672,961.50	\$2,494,549.83	67.06%
2023	\$1,672,961.50	\$402,...	(\$439,002.36)	\$2,060.07	\$1,638,951.44	\$2,583,827.35	63.43%
2024	\$1,638,951.44	\$415,...	(\$78,908.79)	\$6,579.40	\$1,981,642.14	\$3,055,124.56	64.86%
2025	\$1,981,642.14	\$427,...	(\$349,764.12)	\$8,139.55	\$2,067,488.18	\$3,269,612.42	63.23%



You can expand the plus sign to view the included accounts, view individual or consolidated Cash Flows by highlighting specific accounts, and generate Reports based on the consolidated information.

Note: You cannot open the Account Details page from the Account Group drop-down. You must open the Account Details page of any Reserve Account from the original Account location (under the Reserve Account drop-down).