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Layout

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Layout

Bank Reconciliation > Tables > Reconciliation Layout > Layout

This tab is used to design the bank reconciliation layout template that displays the reconciliation summary information.

A list of the category descriptions with the operator type from the Categories tab is displayed. If **Inactive** is selected for any category on the Categories tab, the category description is not displayed on this tab.

Set the reconciliation layout:

Click ⌄ to select the number of columns to be included in the layout.

|

The drag and drop feature is available on this tab, which allows you to change the category order in a column. Hover over a category until the category box color turns a darker blue and the mouse pointer changes to four arrows, then hold down the left mouse button and drag and drop the category to the desired location within the same column (i.e., **Bank** or **System**).

Drag and drop feature demonstration

drag_and_drop_feature.mp4

Click **Save**.

Other functions and features:

Reset	Reset data. Click to retrieve data from the last save. If you click **Reset**, any unsaved changes are lost.


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