

Water Cooler



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Navigating Abbit's Web Site (View/Print Month Statements)

We are continuing the articles on assisting you with maneuvering through our website with ease. Now that you have completed the Client Login, your choices are:

- View/Print Month Statements
- Client Information
- Time Payment Calculation Screen
- Change Your Login and Password
- View Your Preneed Profile

1. Click on View/Print Month Statements
2. Read the instructions, then go to:
Print Statement Month ▼
3. Click on the arrow at the end of the rectangle. This will allow you to look at various months and years.
4. Click on the month you want and it will become highlighted.
5. Now click on the rectangle that says:

Now that your statement has popped up on the screen, we'll go over the layout so you can locate the information you are looking for.

1. The information is listed according to TRUST Number
(example: Trust 4411117700)
2. Followed by the TRUST Name
(example: JPM Bond TR(QFT) for GTD Contr)
3. Under **each** TRUST there may be 4 sections.
 - Contract Inventory:** Clients are listed in alphabetical order by last name.
 - Contract Activity:** Shows clients with deposits to new or existing accounts.
 - Contract Terminations/Cancelations:** This is self explanatory.
 - Summary Section:** Provides totals for this Trust.

(View/Print Month Statements continued)

5. At the end of the statement is:
Totals For All Trusts For (your company name): The totals for each of your Trusts are combined, giving you a Grand Total

You may choose to view the statement information on your computer screen or you may print it. To print, place your cursor on the toolbar in the upper left hand corner and:

1. Click on: File
2. Click Print Preview
3. Click arrow and a pull down menu will occur. ▼
4. Then click 100%: The information will now be in larger print, to fill the page.
5. Click on the printer symbol
6. Now click Print

Some computers may have a somewhat different format for printing so follow the instruction for your computer.

Next month we will proceed to the Abbit Management Preneed System "Client Information" section and walk through the specific information available for each of your clients.

We are here to assist you, so if you have any questions, please call us at 1-800-232-2179.



**Have a Great 4th of July
and a Safe
Happy Summer**