

How to Add a Bank Account

IOLTA One™

www.marathon-records.com

A complete IOLTA / R.E. escrow resource for the solo and small firm



How to add a bank account

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- Step 1: Start from the application home page
- Step 2: Select “Accounts” from the menu bar
 - A list of choices will appear
- Step 3: Select and click “Add Account”
- Step 4: Enter the bank name
 - Hit “tab” on the keyboard
- Step 5: Enter the bank account number
 - Select and click “submit”
 - The new bank account has been added



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Transactions	Bank name	Account nu		
Transactions	North Fork Bank	5555555-6720	\$24,509.81	Modify

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- Step 3: Select and click “Add Account”



The screenshot displays the Marathon Records web application interface. At the top, there is a logo of a woman with scales of justice and a classical building. Below the logo, the text reads "Marathon Records" and "Bookkeeping for IOLTA Accounts". A navigation bar contains "Home", "Clients", "Client Matters", "Accounts", and "Reports". The "Accounts" menu is open, showing options: "View Account", "Add Account", "Modify Account", and "Create Reconciliation Report". A large blue arrow points to the "Add Account" option. Below the menu, there is a section titled "List of bank account" with a table showing account details.

Transactions	Bank name	Account number	Balance	Actions
Transactions	North Fork Bank	5555555-6720	\$24,509.81	Modify

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- Step 4: Enter the bank name
 - Hit “Tab” on the keyboard



The screenshot displays the Marathon Records web application interface. At the top, there is a logo of a woman with scales of justice and a classical building. Below the logo, the text reads "Marathon Records Bookkeeping for IOLTA Accounts". A navigation bar contains links for "Home", "Clients", "Client Matters", "Accounts", and "Reports". The main content area is titled "Update account information below:". Below this title, there are two input fields: "Bank name:" with the value "Sample Bank #34" and "Account number:" with the value "888-927473812-2013". A "Submit" button is located below the input fields. Two blue arrows point towards the input fields, one from the left and one from the right, indicating the focus area.

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- Step 5: Enter the account number *
 - **Note: This is optional*
 - Select and click “Submit”
 - Bank account has now been entered

The screenshot displays the Marathon Records web interface. At the top, there is a logo of a woman with scales and a sword, and the text 'Marathon Records Bookkeeping for IOLTA Accounts'. Below this is a navigation menu with 'Home', 'Clients', 'Client Matters', 'Accounts', and 'Reports'. The main content area is titled 'Update account information below:'. It contains two input fields: 'Bank name:' with the value 'Sample Bank #34' and 'Account number:' with the value '888-927473812-2013'. A 'Submit' button is located below the input fields. Two blue arrows point towards the input fields, one from the left and one from the right.