

How to Modify a Bank Account

IOLTA One™

www.marathon-records.com

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



How to modify an account

IOLTA One™

- Step 1: Start from the application home page
- Step 2: Select “Accounts”
- Step 3: Select “modify Account”
 - A list of your accounts will appear
- Step 4: Select the desired account
 - Double click “modify” next to desired account
- Step 5: Edit account information
- Step 6: Double click “submit” to modify account
 - The account has now been modified



How to modify an account

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- Step 1: Start at application home page
- Step 2: Select “Accounts” from the menu bar



The screenshot shows the Marathon Records application interface. At the top, there is a logo of a woman with scales and a sword, and a classical building icon. The main heading is "Marathon Records" with the subtitle "Bookkeeping for IOLTA Accounts". A blue arrow points down from the building icon to the "Accounts" menu item. The navigation bar includes "Home", "Clients", "Client Matters", "Accounts", and "Reports". The "Accounts" dropdown menu is open, showing options: "View Account", "Add Account", "Modify Account", and "Create Reconciliation Report". Below the menu, there are summary statistics for "Total uncleared deposits" and "Total uncleared disbursements", and a "List of bank accounts" table.

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

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- Step 3: Click “Modify Account”





The screenshot displays the Marathon Records web application interface. At the top, there is a logo of a woman with scales and a sword, and a classical building icon. The main heading is "Marathon Records" with the subtitle "Bookkeeping for IOLTA Accounts". Below this is a navigation bar with "Home", "Clients", "Client Matters", "Accounts", and "Reports". The "Accounts" menu is open, showing options: "View Account", "Add Account", "Modify Account" (circled in blue), and "Create Reconciliation Report". Two blue arrows point towards the "Modify Account" option. Below the menu, there is a table with columns: "Transactions", "Bank name", "Account number", and "Balance". The table contains one row for "North Fork Bank" with account number "5555555-6720" and a balance of "\$24,509.81". A "Modify" link is present in the last column of the row.

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

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- Step 4: Choose the desired account and double click “Modify” next to that account




Marathon Records
Bookkeeping for IOLTA Accounts

Home Clients ▾ Client Matters ▾ Accounts ▾ Reports ▾

Total uncleared deposits: 22
Total uncleared disbursements: 53

List of bank accounts:

Transactions	Bank name	Account number	Balance	Modify
Transactions	North Fork Bank	5555555-6720	\$24,509.81	Modify
Transactions	Sample Bank #34	888-927473812-2013	\$0.00	Modify



How to modify an account

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- Step 5: Edit account information



 
Marathon Records
Bookkeeping for IOLTA Accounts

Home Clients ▾ Client Matters ▾ Accounts ▾ Reports ▾

Update account information below:

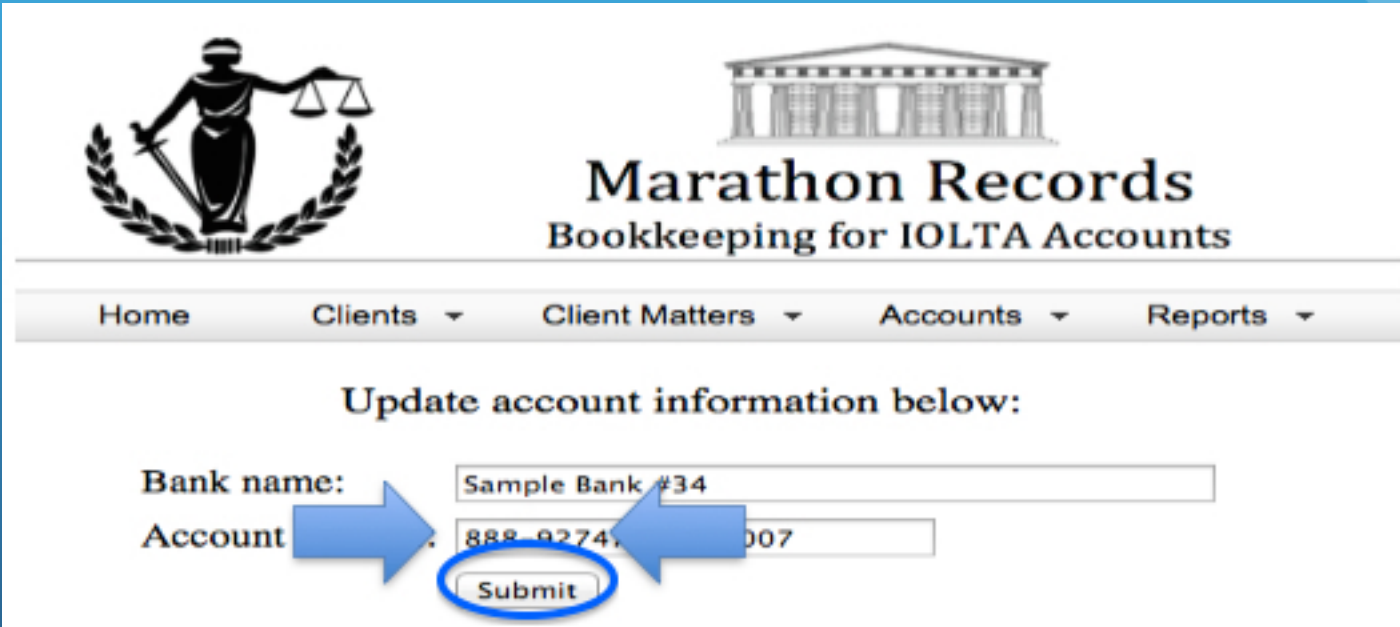
Bank name:

Account number:

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- Step 6: Double click “Submit” to modify account
 - The account has now been modified



The screenshot displays the Marathon Records web interface. At the top left is a logo of a woman with scales of justice. To the right is a classical building icon. The main heading reads "Marathon Records" with the subtitle "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:" and contains two input fields. The first field is labeled "Bank name:" and contains the text "Sample Bank #34". The second field is labeled "Account" and contains the text "888-9274-007". A blue circle highlights the "Submit" button below the second field. Two blue arrows point towards the "Submit" button from the left and right sides of the form.