

Patron Equity Report Dashboard

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Purpose

This dashboard holds the balances of Patronage and provides the ability to sort by *Equity*, *Stock*, and *Investment* and see an overview. This will be part of the month-end process to tie out to the Ledger or verify patron balances. This dashboard will also help determine payout balances of equity and/or stock for patrons.

Details.

This dashboard honors user restrictions based on customer location.

The first section shows the *Classification* breakdown. This dashboard also has *Stock Class* breakdown and *Customer* breakdown of totals. The second dashboard displays a detailed report view.

Filter by *Customer*, *Classification*, *Stock Class*, etc.

Select anywhere to view relevant data points on other sections of the dashboard with the provision to navigate to the detailed report.