

Financial Account Activity Summary By Year

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Go to **Reports** and select *Financial Account Activity Summary by Year*.

The **Financial Account Activity Summary by Year** provides an analysis of your portfolio growth, viewed on a year-to-date basis. The default report date filter displays the latest complete billing month. Click on the filter to change the date in use. You can add additional filters to narrow results.

Navigate from the summary report to the detail for a specific merchant. Alternatively, select the magnifying glass icon next to the **Financial Account Activity Summary by Year** to view the same summarized information for all merchants.

View the **Financial Account Activity Summary by Year** report and the following fields.

Field	Description
ID	The Merchant ID, or MID, is the account number assigned to the account.
Name	The business name is also known as the DBA (Doing Business As). The DBA will be used when processing transactions and appear on the cardholder statement.
Status*	The account moves through different stages depending on the actions and activities of the merchant, and the merchant's status will reflect this information.
Status Changed Date*	The date of the last status change to the merchant account.
Date Approved*	The date the application was approved.
Date Activated*	The first batch greater than \$10 was processed on this date, indicating the account is being actively used.
Established Monthly Volume*	The average rolling sales of 3 prior full processing months.
Prior YTD Sales Volume	The dollar amount from the previous year's sales volume.
Prior YTD Partner Net Rev	The dollar amount from the previous year's partner net revenue.
Prior YTD Residual	The dollar amount from the previous year's residual payment.
Current YTD Sales Volume	The dollar amount of the current year's sales volume.
Current YTD Partner Net Rev	The dollar amount of the current year's partner net revenue.
Current YTD Residual	The dollar amount of the current year's residual.
YOY Sales Volume	The dollar amount of the year-on-year sales volume.
YOY Partner Net Rev	The dollar amount of the year-on-year partner net revenue.
YOY Residual	The dollar amount of the year-on-year residual.

*Appears in the Lookup report only.