First Horizon BusinessConnect^{SM}

Download and Export Information

DOWNLOAD AND EXPORT

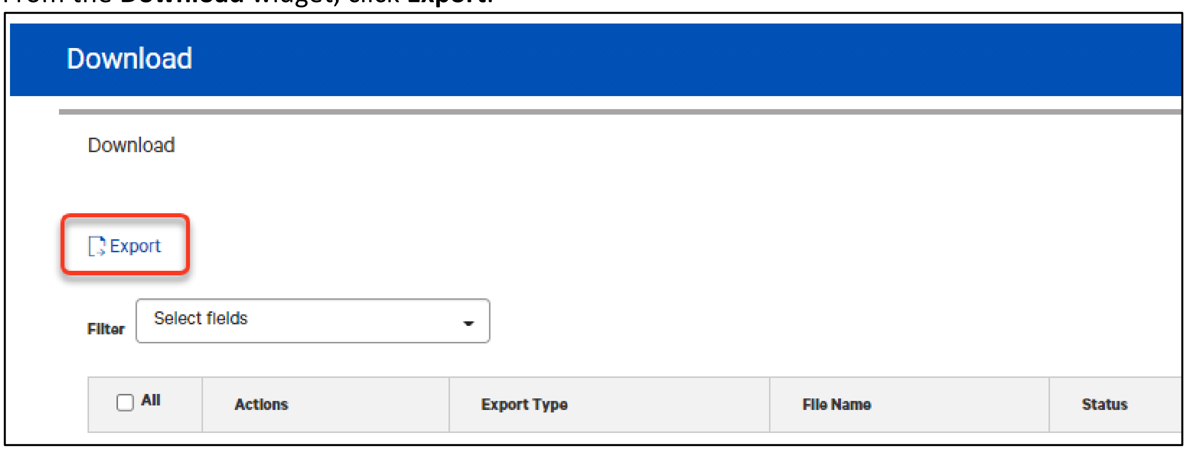
The Download widget in BusinessConnect[SM] allows you to download balance and transaction data in CSV and CS Basic Export (a basic comma-separated format). In order to do so, you must have permission to download data in the appropriate format.

Bank account and transaction information can also be downloaded in CSV format from the Account Summary screen or transaction list view with the export function.

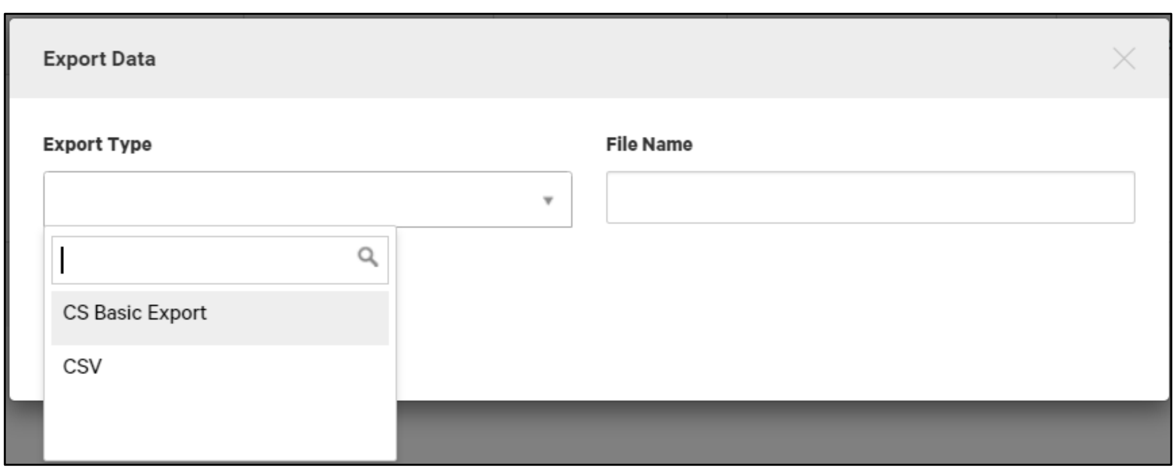
There are **two steps** to downloading balance and transaction data. First, you need to submit an export request. After the system processes the request, you can download the exported data from the Downloads screen. Note that the entry of different fields is required for each of the different export types. These differences are detailed in the instructions that follow.

SUBMIT EXPORT REQUEST

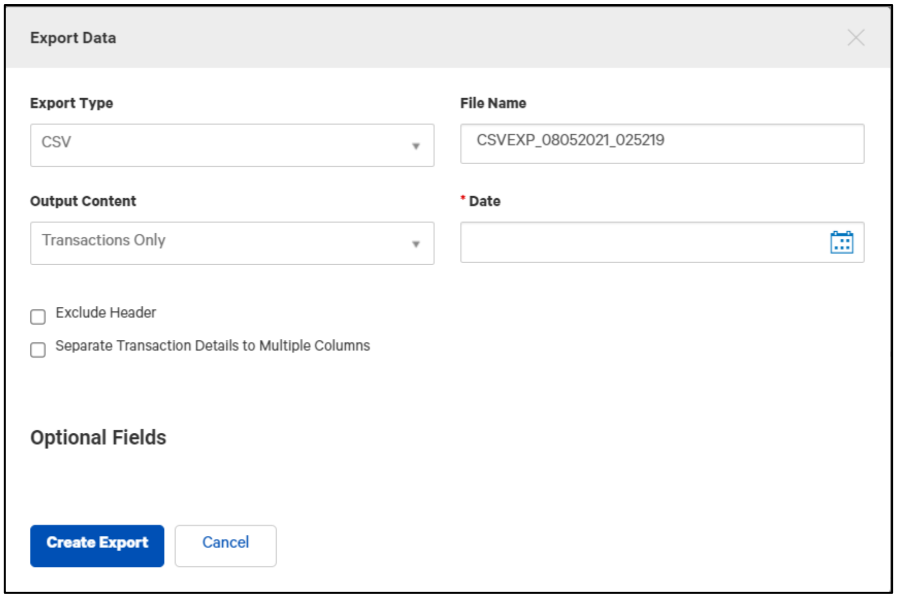
1. From the **Download** widget, click **Export**.



2. From the **Export Type** drop-down, select the type of file you want to export.
3. Accept the default file name or enter a **new file name** for the exported file.



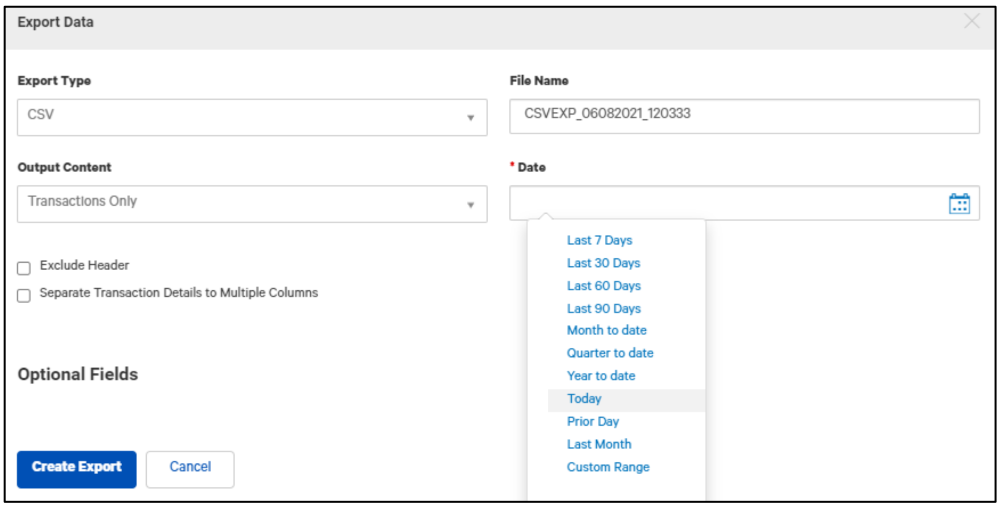
4. If you selected **CSV as the export type**,
    - Select the content you want to export from the Output Content drop-down: **Transactions Only, Balances and Transactions**, or **Balances Only.**
    - You can also check the **Exclude Header box** if you want to exclude the header from the exported file.
    - Check the **Separate Transaction Details to multiple columns** box to export transaction detail as comma-delimited fields.



Note

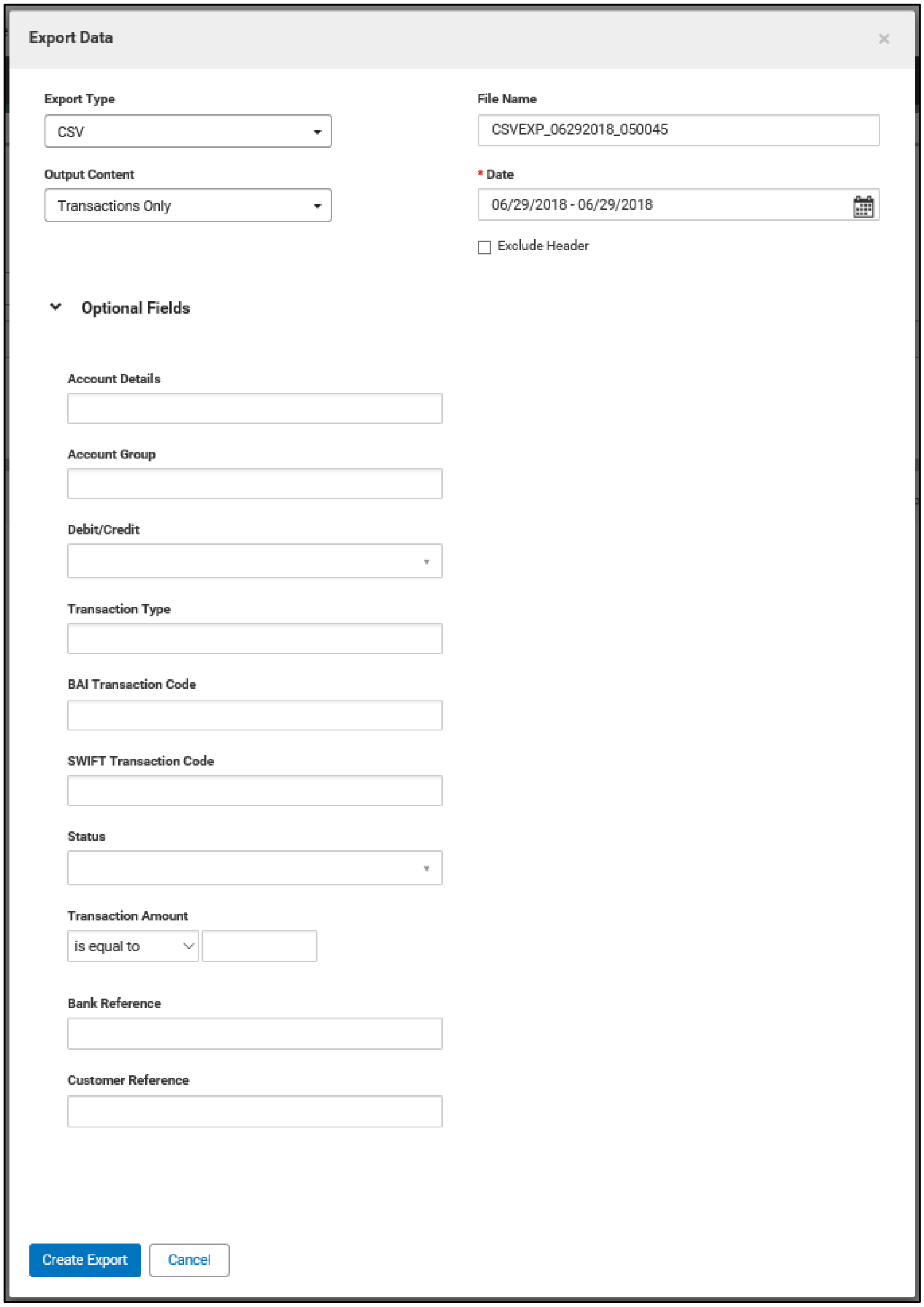
When the exported CSV file is opened in Microsoft Excel, each comma-delimited data element will appear in a separate column.

5. Use the calendar icon to select a **Date** or date range for the exported data:
   - Last 7 Days
   - Last 30 Days
   - Last 60 Days
   - Last 90 Days
   - Month to date
   - Quarter to date
   - Year to day
   - Today (Default. If you don't have access to current-day accounts/transactions, select **Prior day**.)
   - Prior day
   - Last Month
   - Custom Range: Select the first day of the range; the last available day will be the end date of the range.



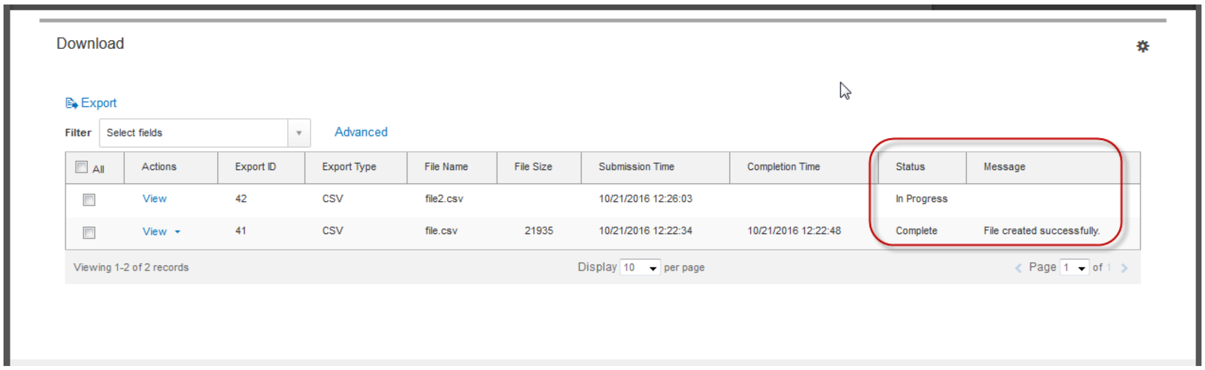
6. Click **Optional Fields**. The section expands to include additional criteria for the data you want to export.
7. Complete the necessary fields and any optional fields you want to include. See [Download Fields]for an explanation of the fields.

8. Click **Create Export**.



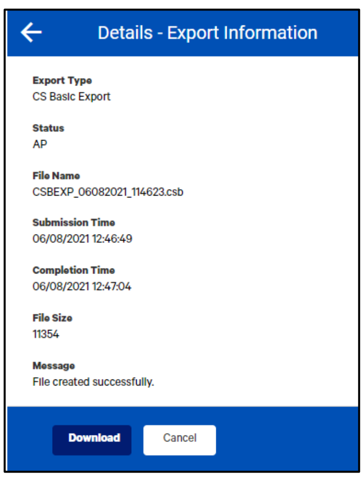
9. The export request is listed in the **Downloads** widget.

   The Status column lists the progress of the request. The status will change to Complete once the export has finished. If the file was created successfully, the **Message** column will reflect this fact. An export normally takes less than a minute to process, depending on the size of the file. If the Status has not changed to Complete after a minute or so, click the Refresh button to the left of today's date

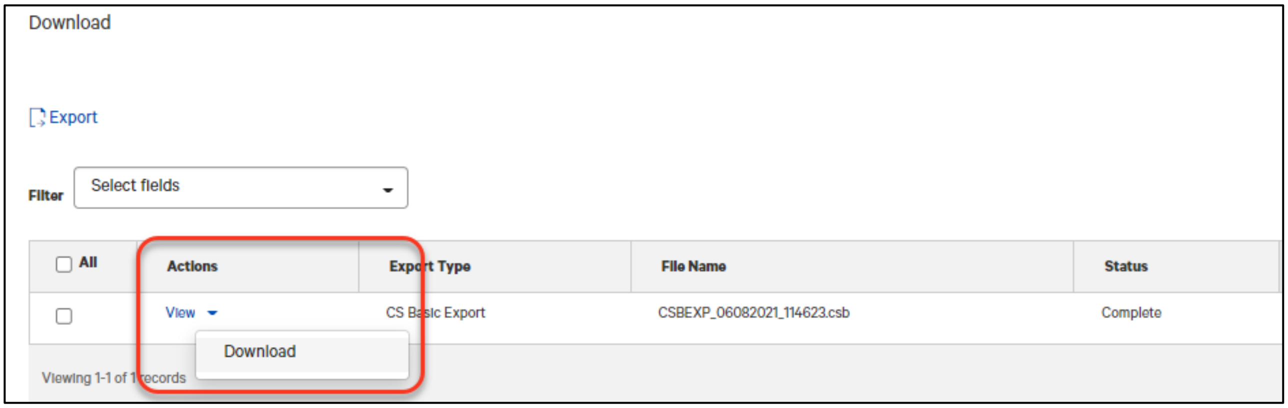


DOWNLOAD EXPORTED FILE

1. In the Downloads widget, click **View** from the Actions menu to review the export information.
2. Click **Download** on the window that appears.



3. You may also click **View** and then **Download** without viewing the export information.



4. The item is downloaded to your computer. Follow your browser instruction to open or save the file.

DOWNLOAD FIELDS

The following table describes fields that may appear on the Export Data screen. These fields allow you to further filter the data you would like to export.

Field	Explanation
Date	The date or range of dates for the data to export
Account Details	Details about the account. The default setting is *blank* (optional). This results in all available accounts being selected for export.
Account Group	A name of a group of accounts you want to return data for The default setting is *blank* (optional). This results in all available accounts being selected for export.
Debit/Credit	You can export either debit or credit transactions
Transaction Type	The types of transaction data to download
BAI Transaction Code	The BAI code associated with the data you would like to download
SWIFT Transaction code	The SWIFT code associated with the data you would like to download
Status/Transaction Status	The status of the download
Transaction Amount	The amount of the transaction
Bank Reference	Bank reference information
Customer Reference	Customer reference information