



First Horizon BusinessConnectSM

Download and Export Information





DOWNLOAD AND EXPORT

The Download widget in BusinessConnectSM 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**.

The screenshot shows the 'Download' widget with a blue header. Below the header, there is a 'Download' label and an 'Export' button with a download icon, which is highlighted with a red rectangle. Below the 'Export' button is a 'Filter' dropdown menu with the text 'Select fields'. At the bottom, there is a table with five columns: 'All' (with a checkbox), 'Actions', 'Export Type', 'File Name', and 'Status'.

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.

The screenshot shows the 'Export Data' dialog box with a close button (X) in the top right corner. It has two main sections: 'Export Type' and 'File Name'. The 'Export Type' section has a dropdown menu with a search icon. A search results list is visible below the dropdown, showing 'CS Basic Export' and 'CSV'. The 'File Name' section has a text input field.



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.

The screenshot shows a dialog box titled "Export Data". It contains the following fields and options:

- Export Type:** A dropdown menu with "CSV" selected.
- File Name:** A text input field containing "CSVEXP_08052021_025219".
- Output Content:** A dropdown menu with "Transactions Only" selected.
- * Date:** A date picker icon.
- Exclude Header:** An unchecked checkbox.
- Separate Transaction Details to Multiple Columns:** An unchecked checkbox.
- Optional Fields:** A section header with no content below it.
- Buttons:** "Create Export" (blue) and "Cancel" (white with blue border).

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 date
- 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**.

Export Data

Export Type

CSV

File Name

CSVEXP_06292018_050045

Output Content

Transactions Only

Date

06/29/2018 - 06/29/2018

Exclude Header

☐

Optional Fields

Account Details

Account Group

Debit/Credit

Transaction Type

BAI Transaction Code

SWIFT Transaction Code

Status

Transaction Amount

is equal to

Bank Reference

Customer Reference

Create Export

Cancel



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									
Export									
Filter <input type="text" value="Select fields"/> Advanced									
All	Actions	Export ID	Export Type	File Name	File Size	Submission Time	Completion Time	Status	Message
<input type="checkbox"/>	View	42	CSV	file2.csv		10/21/2016 12:26:03		In Progress	
<input type="checkbox"/>	View	41	CSV	file.csv	21935	10/21/2016 12:22:34	10/21/2016 12:22:48	Complete	File created successfully.

Viewing 1-2 of 2 records Display 10 per page Page 1 of 1

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.

← Details - Export Information

Export Type
CS Basic Export

Status
AP

File Name
CSBEXP_06082021_114623.csb

Submission Time
06/08/2021 12:46:49

Completion Time
06/08/2021 12:47:04

File Size
11354


Message
File created successfully.

[Download](#) [Cancel](#)




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

Download

 Export

Filter

<input type="checkbox"/> All	Actions	Export Type	File Name	Status
<input type="checkbox"/>	View 	CS Basic Export	CSBEXP_06082021_114623.csb	Complete

Viewing 1-1 of 1 records

Download

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 <i>blank</i> (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 <i>blank</i> (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