



First Horizon BusinessConnectSM

Report Management



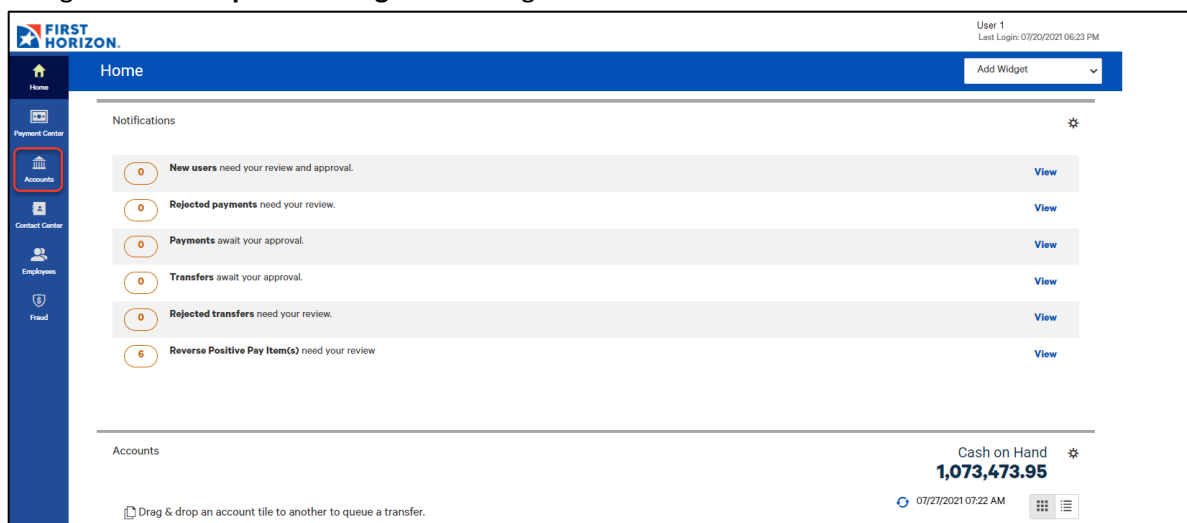


REPORT MANAGEMENT

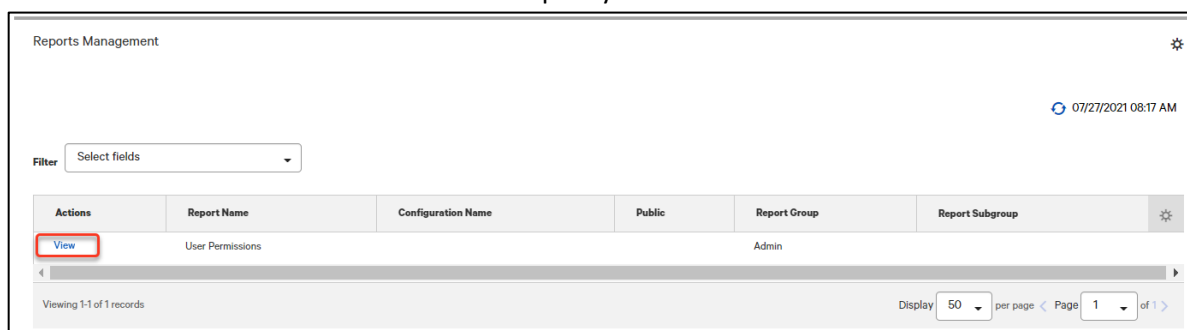
The Reports Management widget shows a list of reports available. By default, the widget is displayed on Account Center workspace.

VIEW REPORTS

1. Click **Accounts** in the menu on the left-hand side.
2. Navigate to the **Reports Management** widget.



3. Select **View** in the Actions column for the report you would like to view.



4. The system displays the appropriate report criteria selection.

Notes

The View option for some reports will display a configuration screen where you can filter the data you would like to view in the report. Set the filter criteria by expanding a section and entering or selecting the appropriate data. You can save the filter criteria by clicking **Save**.

When you are ready to view the report, click **Run Report**.



SPECIAL REPORTS

Special Reports are reports generated by an external/third party application. By default, the widget is displayed on the Account Center workspace and provides reports with a date of today.

To view a special report:

1. Click **Accounts** in the menu on the left- hand side.
2. Navigate to the **Special Reports** widget.
3. Search for reports by clicking the **Edit** link.

The screenshot shows the 'Special Reports' widget interface. At the top, there is a title 'Special Reports' and a settings icon. Below the title, there are two links: 'Search Criteria' and 'Edit'. The 'Edit' link is highlighted with a red box. Below the links, there are four columns: 'Report ID' (All), 'Description' (All), 'Date' (Today), and 'File Type' (All). Below these columns, there is a 'Filter' section with a dropdown menu labeled 'Select fields'. Below the filter, there is a table with columns: 'Actions', 'Report ID', 'Description', 'Report Date', 'Load Date', 'File Type', and 'Number of Pages'. The table is currently empty, and the text 'There is no content' is displayed below it. At the bottom, there is a footer section with the text 'Viewing 0-0 of 0 records' and a pagination control showing 'Display 50 per page' and 'Page 1 of 1'.

4. Select or enter search criteria.
 - a. Report ID
 - b. Description
 - c. Date (**Report Date** or **Load Date**) Click the appropriate radio button, and then use the calendar icon to select a date or date range.
 - d. File type: either **Data File** or **Report**.



5. Click **Search**.

Special Reports

Report ID

Description

Date

01/01/2021 - 07/27/2021

☒ Report Date ☐ Load Date

File Type

Report

Search

Filter

Select fields

Actions	Report ID	Description	Report Date	Load Date	File Type	Number of Pages
There is no content						

6. Do one of the following:

- If the type is *Data File*, select **Download** in the **Actions** column to save or download a copy of the file.
- If the type is *Report*, select **View** in the **Actions** column to see the report onscreen.

To initiate another search, click the **Edit** link and enter or select your search criteria.