First Horizon TreasuryConnect<sup>SM</sup> and First Horizon BusinessConnect<sup>SM</sup>



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# **FILTERING A LIST**

You can use the filter function to limit the records shown in a list to records that meet specific criteria. Lists can be searched using the quick search or the **Manage filters** option. For simple searches, use the quick search. For more complex searches, select **Manage filters**.

# USE QUICK SEARCH

To filter the list with the quick search:

1. In the **Select Fields** drop-down, select the field you would like to search by.

The example drop-down list is from Balance & Transaction Summary.

ilter	Select fields	•	
	Manage Filters	-	
	Post Date		scription
	Transaction Description		D ACH C
_	Amount		D ACH C
9	Debit/Credit		DACH C
	Bank Reference		
	Customer Reference		
	Transaction Detail		
	Balance		
	Not currently displayed		
[	Credit Amount	•	

- 2. If necessary, select an operator (for example, is equal to, is less than) from the list.
- 3. Enter the search criterion.
- 4. Click Apply.

er Post [	Date	•	02/04/2022 - 02/04	+/2022		Арр	ly Clear
	Post Date	Transaction Descr	Today Prior Day Last Month	nt	Debit/Credit	Bank Reference	Customer Referen
	02/04/2022	PREAUTHORIZED #	Last 7 Days	c	Credit		
	02/04/2022	PREAUTHORIZED #	Last 30 Days Last 60 Days	C	Credit		
כ	02/04/2022	CHECK PAID	Last 90 Days Month to date Quarter to date	Э	Debit		1013
כ	02/04/2022	CHECK PAID	Year to date Custom Range	C	Debit		1012
-	02/04/2022	CHECK PAID	-16	\$50.00	Debit		41814

The records that meet the criterion you specified appear in the list.

5. Repeat Steps 1 through 4 to search on as many fields as you want.

The filters (fields) that you select appear as a series of tiles above the list grid.

- To remove a selected filter, click the x (23) icon within the tile. The displayed list will adjust accordingly.
- To hide the filter tiles, click the **Filters** link at the far right.

You can toggle the Filters link between two states:



Filters are hidden. Click to *show* the filters.

• Filters are exposed. Click to hide the filters.

6. To remove all filters and search the entire list again, click **Clear**, and enter a new search.

# **USE MANAGE FILTERS (MULTIPLE CRITERIA)**

The Manage Filters options allows you to add multiple search criteria.

## To filter a list using the Manage filters option:

1. In the Select fields drop-down, click Manage filters.



- 2. Select the filters to add.
- 3. Click **Apply** to see the search results.

Manage Filters		×	
2 of 17 filters selected			•
Post Date	02/04/2022 - 02/04/2022		
Transaction Description			
Amount			
Credit Amount			
Debit Amount			
🗆 Bank ID			
Z Status	Cleared 👻		
C Account Name		•	•
Apply Cancel Clear All			



- 4. The records that meet the criteria you specified will appear in the list.
- 5. Click **Clear** to remove the filter.

Filter	Select fields	•	
Post	Date 02/04/2022 🕲	Status Cleared 🛛	Clear

### SAVE FILTER AS NEW VIEW

Once you filter a list, you can save it as a new view.

#### To save a filter as a view:

- 1. Filter the list as described in **Quick Search** or **Use Manage Filters** above.
- 2. Click the View drop-down in the upper right of the widget.
- 3. Click Save view.

Filter Post I	Select fie Date 02/0	elds 4/2022 🕲	▼ Status Cleared ©	Clear							Last 7Days + Save view All Transactions	
	All	Post Date	Transaction Descrip	ation	Amount	Debit/Credit	Bank Reference	Customer Reference	Image	Transactio	Checks Paid	÷
											Last 30 Days	
							There is no conter	nt			Last 7 Days	
											Previous Business Day	
											Today	•
Viewin	ng 0-0 of 0 r	ecords								Display 1	0 🗸 per page < Page	1 🗸 of 1 >

The view is saved in the list of available views.

If you want to delete this view in the future, select the **Delete** icon **m**.

#### **NAVIGATE WITH FILTERS IN APPLIED**

When you apply a filter or filters to any list in the application, that filter will **remain in force during your session** within the application.

You can navigate to other workspaces, widgets, and screens, and the filter(s) you applied in the list will be retained.

This behavior is true for users who navigate from the application to a portal environment and back again to the application.



# **SORT A LIST**

A list can be sorted so that the order of the rows is reversed. Sorting capability is **not** available on all columns.

#### To sort a list:

- Click on the column header. The rows of data will be resorted.
   An up/down arrow appears in the column to indicate the sort order.
- 2. To return the rows to their original order, click the column header again.

Filter Select fields  Type Checks Paid									Checks Paid	Ŧ	• Filters
	Post Date	Transaction Description	Amou	Credit Amou	Debit Amou	Bank Reference	↓ Customer Referen	Transaction Det	Image	BAI Code	Ağlılı
	02/03/2022	CHECK PAID	-829.76		829.76	004000161530	0000006320	CHECK	n Bayes (B)) N Bayes North Al Ro	475	
	01/26/2022	CHECK PAID	-829.76		829.76	004000161530	0000006320	CHECK	MANNA BUS	475	



# **MANAGING COLUMNS**

## **MOVE COLUMNS**

You can move columns to a new location in a list.

#### To move a column:

- Click, hold and drag the column to the new position.
- Release the mouse to drop the column in your desired position.

Filter	Select fie	lds	•							Checks Paid	Ŧ	• Filters
Туре	Checks P	aid				(						
	All I	Post Date	Transaction Description	Amou	Credit Amou	Debit Amou	Customer Referen	. nk Reference	Transaction Det	Image	BAI Code	Ağdıtı
		02/03/2022	CHECK PAID	-120.94		120.94	006310	004000343640	СНЕСК	MALVER BY	475	

### ADD OR REMOVE COLUMNS

Columns can be added or removed from some lists in the application. If the list supports this function, you will see the **Options** (\*\*) icon in the header row at the right side of the list.

#### To add or remove columns:

1. Click the **Options** icon.

Filter	Filter Select fields  Type Chocks Paid										• Filters
•	III Post Date	Transaction Description	Amou	Credit Amou	Debit Amou	Customer Referen	Bank Reference	Transaction Det	Image	BAI Code	*
	02/03/2022	CHECK PAID	-120.94		120.94	0000006310	004000343640	CHECK	Balance (B) Balance Balance	475	

- 2. The available columns are displayed. The checked boxes indicate which columns currently appear in the list.
- 3. Simply check or uncheck the columns you would like to include/exclude in your list.
- 4. Click Update.

Filter	Select fields				Checks Paid v OFilters
Тур	be Checks Paid				
	All Columns				
	Account Name	Additional Information	Amount	✓ BAI Code	Balance Balan
	Bank ID	<ul> <li>Bank Reference</li> </ul>	Credit Amount	<ul> <li>Customer Reference</li> </ul>	Debit Amount
	Debit/Credit	✓ Image	Post Date	Status	Transaction Description
	Transaction Detail	🗋 Туре	Value Date		
	Update Cancel				
	01/30/2022 CHECK PAID	-120.94	120.94 00000006310	004000343640 CHECK	475