First Horizon TreasuryConnect℠ and First Horizon BusinessConnect℠

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NEW 3/2022

FILTERING A LIST

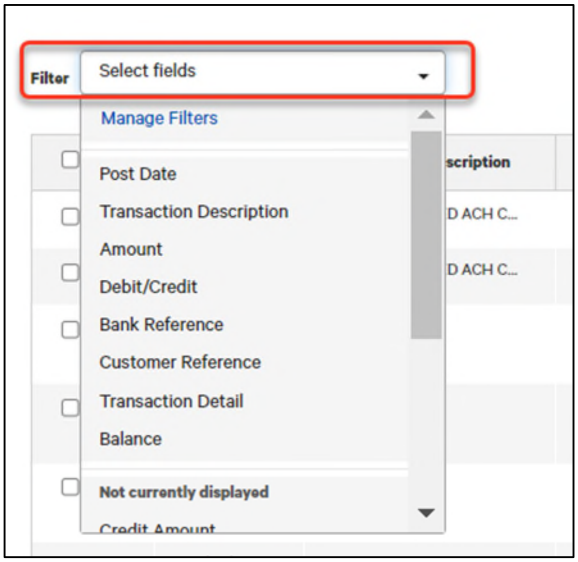
You can use the filter function to limit the records shown in a list to records that meet specific criteria. Lists can be searched using the quick search or the **Manage filters** option. For simple searches, use the quick search. For more complex searches, select **Manage filters**.

USE QUICK SEARCH

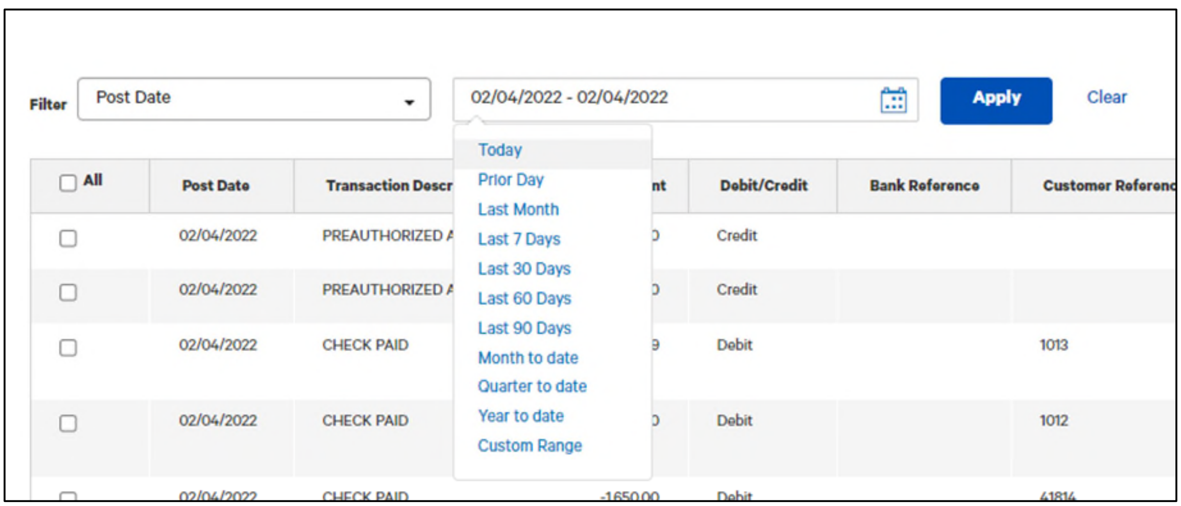
To filter the list with the quick search:

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**.



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**.



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** (⊗) 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.

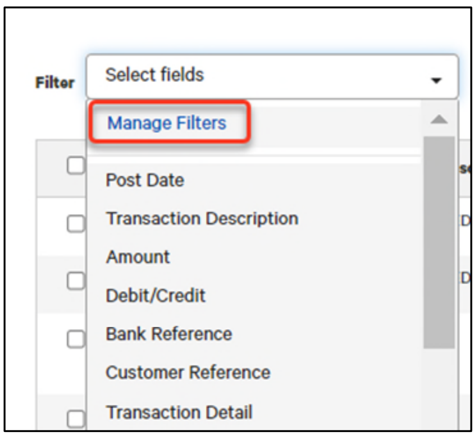
6. To remove all filters and search the entire list again, click **Clear**, and enter a new search.

USE MANAGE FILTERS (MULTIPLE CRITERIA)

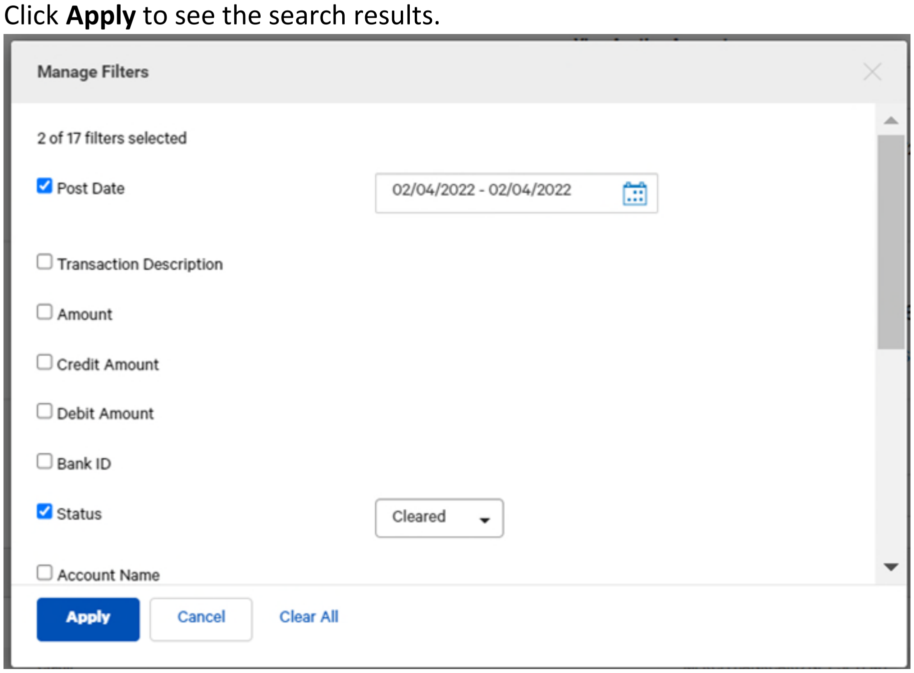
The **Manage Filters** options allows you to add multiple search criteria.

To filter a list using the Manage filters option:

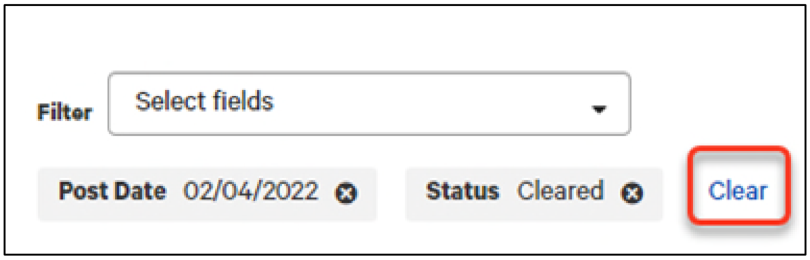
1. In the **Select fields** drop-down, click **Manage filters**.



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



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

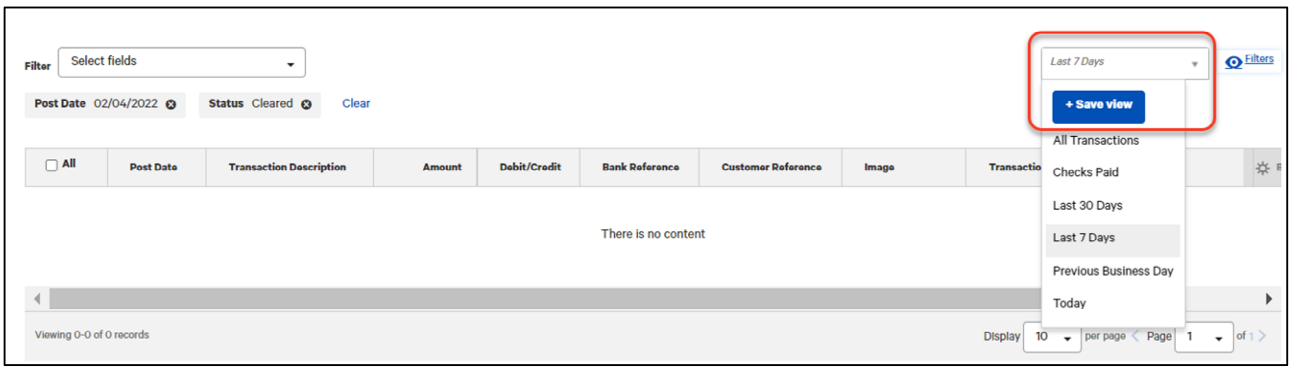


SAVE FILTER AS NEW VIEW

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**.



The view is saved in the list of available views.

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

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

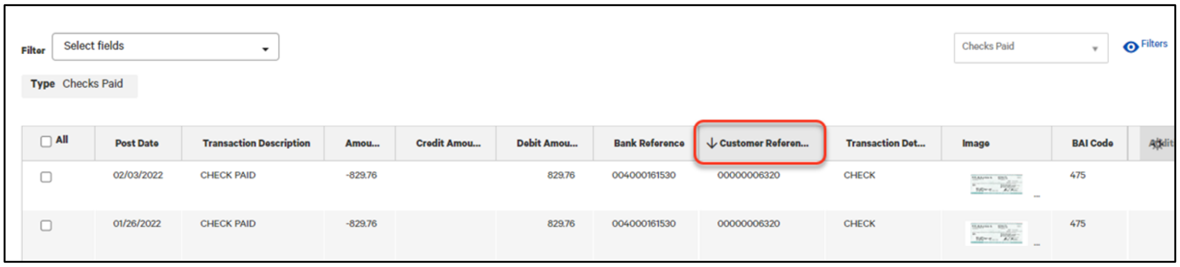
A list can be sorted so that the order of the rows is reversed. Sorting capability is **not** available on all columns.

To sort a list:

1. 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.



MANAGING COLUMNS

MOVE COLUMNS

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

To move a column:

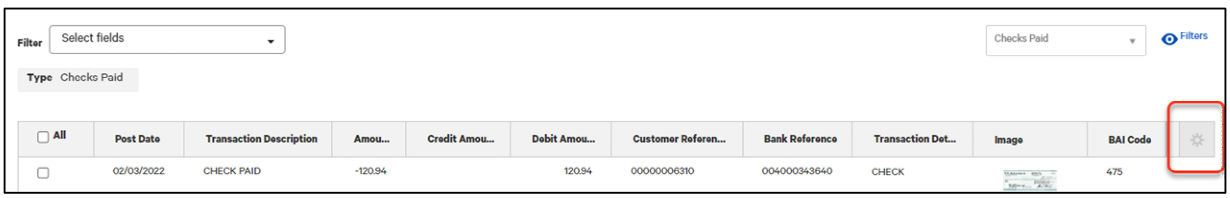
- Click, hold and drag the column to the new position.
- Release the mouse to drop the column in your desired position.

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.



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**.