Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout	Print	Export Report Data		

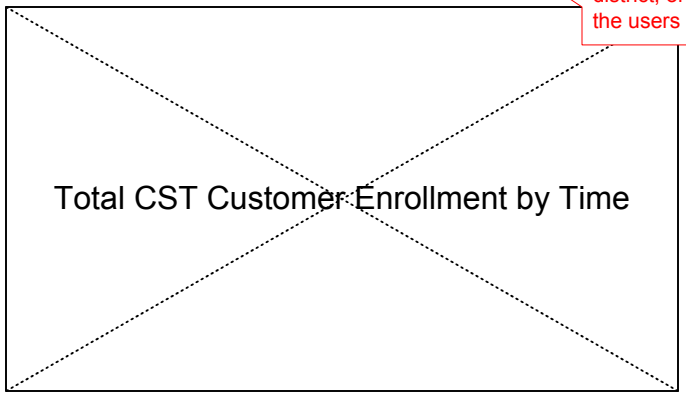
Reports

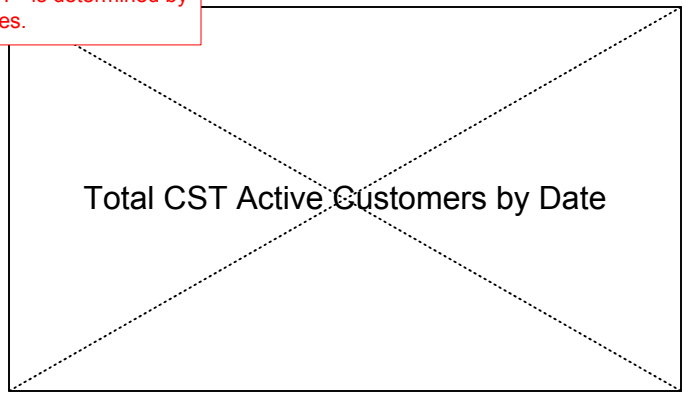
- *CST Customer Data*
- New Customers
- Performance v. Goals

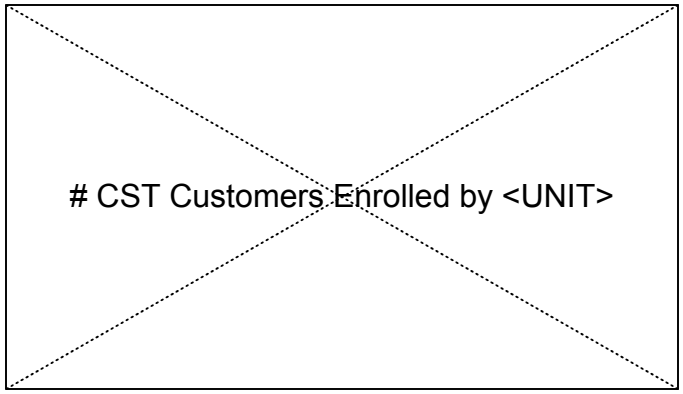
Search

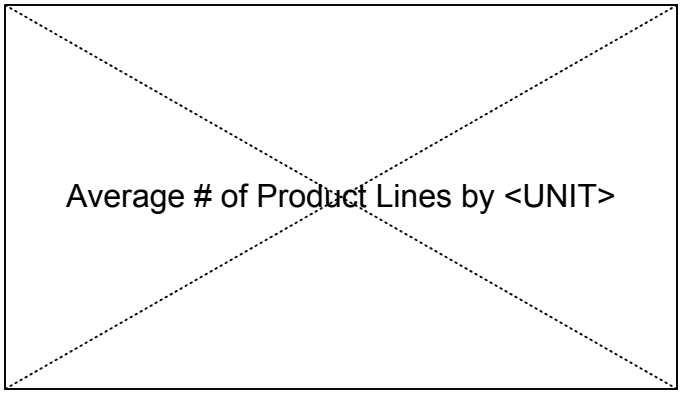
CST Customer Data by <UNIT>

This screen displays CST Summary Data by <UNIT>, which may be group, territory, division, district, or AU. Default <UNIT> is determined by the users role and preferences.









Standard Footer Info? Big Bank requirements?

PAGE NAME: **CST Summary Data Report**				
DATE: 09/30/04	PAGE: 1 OF 10		Doc. Code: *<document code here>*	
PROJECT: *<project name here>*			CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

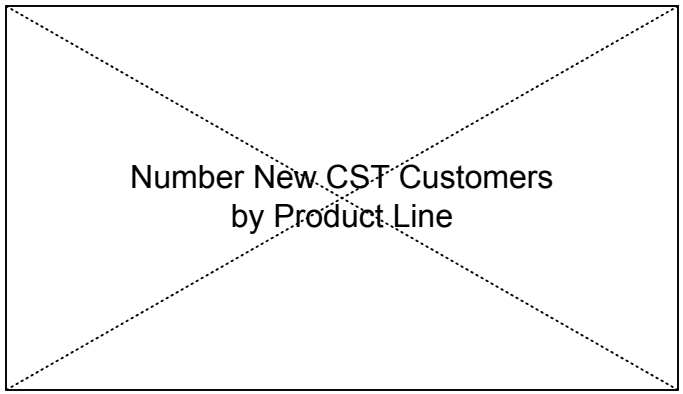
Login / Logout | Print | Export Report Data

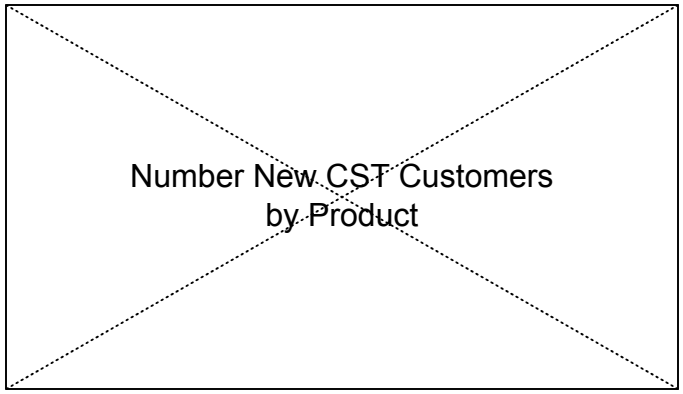
Reports

- CST Customer Data
- *New Customers*
- Performance v. Goals

Search

Number of New CST Customers by Product Line





Product Line	Products	# New Customers

Select Product Line to Display: Choose One

PAGE NAME: **Product Summary Report**			
DATE: 09/30/04	PAGE: 2 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

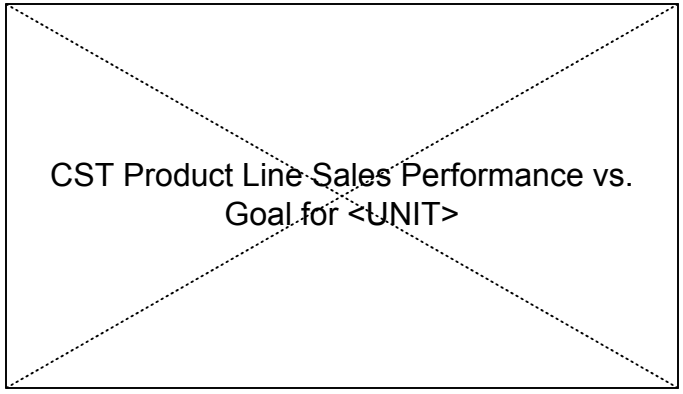
Login / Logout	Print	Export Report Data		

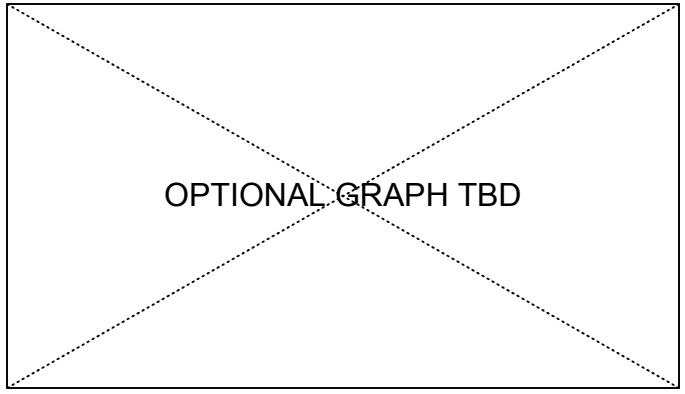
Reports

- CST Customer Data
- New Customers
- *Performance v. Goals*

Search

Performance vs. Goals





PAGE NAME: **Performance v. Goals Report**			
DATE: 09/30/04	PAGE: 3 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout	Print	Save Search Results	Compare Results

Reports

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

Please enter the desired search criteria at the left and press "Find." To narrow your search, provide as much information as possible.

You may change the sort order of the search results by clicking on the label of the column by which you wish to sort.

More detailed information about a CST Customer may be obtained by selecting that row.

Start Search

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Print | Save Search Results | Compare Results

Select Search Criteria

Custom

Please enter your search criteria below. Selecting a pre-set search type above will highlight required fields.

CST Customer Data (for searching only CST Customers)

CST Customer Name: | CST ID:

CST Customer City: | CST Setup Date:

CST Customer State:

CST Customer Logon from: to:

Business Customer Relationship Data (for searching all Commercial Customers)

Relationship Name: | Relationship Number:

Relationship Type:

RM Last Name: | RM First Name:

Consultant Territory:

CST Product Lines and Products

Check here to display customers with no current product lines.

Product Lines and Products:

Add Selected > | Add All >

Remove Selected | Remove All

General Ledger Hierarchy

Organization Type: AU

Look Up GL Hierarchy

Organization Number:

Add

Remove Selected | Remove All

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

Next Step >

Search widget slides onto screen to reveal the search fields and retreats when user clicks "Find Records"

PAGE NAME: **New Search**			
DATE: 09/30/04	PAGE: 5 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Print | Save Search Results | Compare Results

Select Search Criteria

Custom

Please enter your search criteria below. Selecting a pre-set search type above will highlight required fields.

CST Customer Data (for searching only CST Customers)

CST Customer Name: | CST ID:

CST Customer City: | CST Setup Date:

CST Customer State:

CST Customer Logon from: to:

Business Customer Relationship Data (for searching all Commercial Customers)

Relationship Name: | Relationship Number:

Relationship Type:

Look Up General Ledger Hierarchy

Close GL Look Up

Organization Type: AU | Parent Organization ID:

Organization ID: | Organization Name:

Look Up

Org Type	Org ID	Org Name

Add >

Selected Org(s):

Remove Selected

Remove All

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

Next Step >

PAGE NAME: **Search GL Hierarchy**			
DATE: 09/30/04	PAGE: 6 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Print | Save Search Results | Compare Results

Select Output Data

Custom

Please select the desired output data. A pre-set search type will automatically select relevant output data.

- ☐ CST Customer Name
- ☐ CST Customer ID
- ☐ CST Customer Setup Date
- ☐ CST Customer Last Logon Date
- ☐ CST Customer Number of Product Lines
- ☐ CST Customer Number of Products
- ☐ Commercial Customer Name
- ☐ Business Relationship Type
- ☐ Business Relationship Name
- ☐ Business Relationship Number
- ☐ Relationship Manager Name
- ☐ Relationship Manager Officer Number
- ☐ Group Name
- ☐ Group Number
  - ☐ Division Name
  - ☐ Division Number
    - ☐ District Name
    - ☐ District Number
      - ☐ AU Name
      - ☐ AU Number
- ☐ Territory

< Back to Search Criteria

Find Matching Records >

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

PAGE NAME: **Select Output Fields**			
DATE: 09/30/04	PAGE: 7 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Print | Save Search Results | Compare Results

Reports

Territory	CST Name	CST ID	Setup Date	Last Logon	AU #	AU Name	Business Rel #	RM Name	# Product Lines	# Products

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

New Search

CST Customer Data:

Name
CST ID
Address 1
Address 2
Address 3
Address 4
City
State ZIP Country

Territory
Group
Division
District
AU

Business Relationship Data:

WICS Name
WICS ID

Max Relationship Name
Max Relationship ID

Relationship Manager Name
Relationship Manager ID

List Other CST Customer Names with same WICS ID

Product Line Data:

List Product Lines owned by CST ID
List Products within each Line owned by CST ID (and Service Code?)

Clicking on a row will open a printable window with further details on that CST Customer.

Selecting a row will provide additional information about that CST Customer.
Search Results may be sorted by clicking on the label of the column by which you wish to sort.

PAGE NAME: **Search Results**			
DATE: 09/30/04	PAGE: 8 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Reports

Print | Save Search Results | *Compare Results*

Territory	CST Name	CST ID	Setup Date	Last Logon	AU #	AU Name

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

The active Search Results section is indicated by a background highlight in the column labels.

Selecting "New Search" clears the active section and opens the search widget with blank fields.

Selecting "Edit Search Criteria" leaves search results content intact and opens the widget pre-populated with the current search criteria.

Selecting "Close this Search" removes the active pane and returns the remaining pane to full-screen mode.

New Search

Edit Search Criteria | Close this Search

Print | Save Search Results

Territory	CST Name	CST ID	Setup Date	Last Logon	AU #	AU Name

Edit Search Criteria | Close this Search

PAGE NAME: **Compare Searches 1**			
DATE: 09/30/04	PAGE: 9 OF 10	Doc. Code: *<document code here>*	
PROJECT: *<project name here>*		CLIENT: *<client name here>*	

Retail Web Banking: Report Generator

Big Bank Logo

Login / Logout | Print | Save Search Results | *Compare Results*

Reports

Search Criteria

CST Criteria:

Name:
ID:
City:
State:
Setup:
Logon from:
Logon to:

Business Customer Criteria:

Rel Name:
Rel Type:
Rel #:
RM Name:

Territory:

Product Criteria:

Lines:
Products:

GL Hierarchy:

Territory	CST Name	CST ID	Setup Date	Last Logon	AU #	AU Name	Business Rel #	RM Name	# Product Lines	# Products

Edit Search Criteria | Close this Search

Territory	CST Name	CST ID	Setup Date	Last Logon	AU #	AU Name	Business Rel #	RM Name	# Product Lines	# Products

New Search | Edit Search Criteria | Close this Search

PAGE NAME: **Compare Searches 2**		
DATE: 09/30/04	PAGE: 10 OF 10	Doc. Code: *<document code here>*
PROJECT: *<project name here>*		CLIENT: *<client name here>*