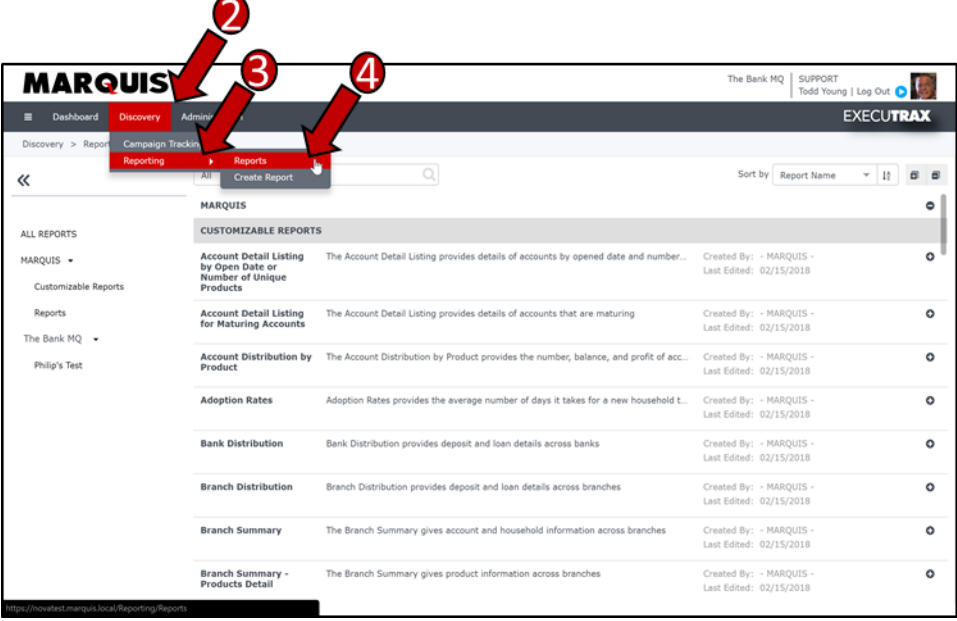
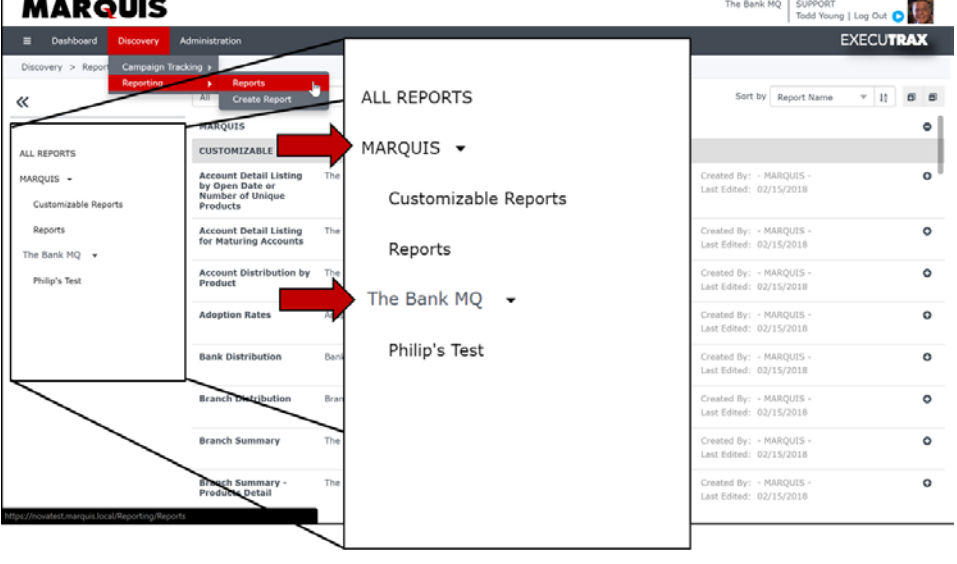
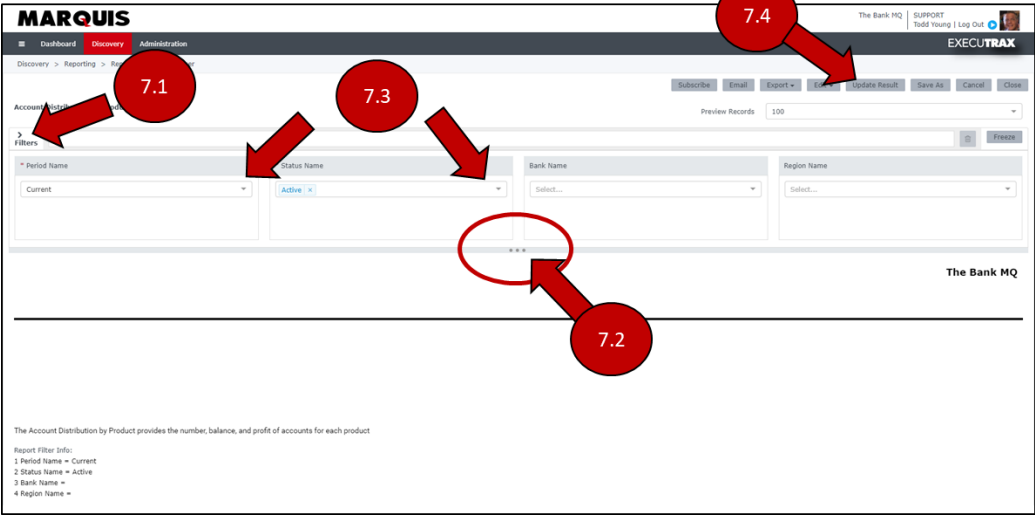


MARQUIS

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| MNET601 | Pulling a Standard Report |
| Order of Steps | Tasks |
| Step 1 | Log into Marquis Next |
| Step 2 | Click on "Discovery" on left side of menu bar to display drop down menu |
| Step 3 | Hover over "Reporting" |
| Step 4 | Click on "Reports" |
| |  <p>The screenshot shows the MARQUIS Reporting Reports page. Red arrows and numbers indicate the navigation steps: 2 points to the 'Discovery' menu item, 3 points to the 'Reporting' dropdown menu, and 4 points to the 'Reports' sub-menu item. The page displays a list of customizable reports under the 'MARQUIS' category, including 'Account Detail Listing by Open Date or Number of Unique Products', 'Account Detail Listing for Maturing Accounts', 'Account Distribution by Product', 'Adoption Rates', 'Bank Distribution', 'Branch Distribution', 'Branch Summary', and 'Branch Summary - Products Detail'.</p> |
| Step 5 | Under "All Reports" and under Marquis click on "Customizable Reports" or "Reports" |
| |  <p>The screenshot shows the MARQUIS Reporting Reports page with a callout box highlighting the 'All Reports' section. The callout box contains a list of report categories: 'ALL REPORTS', 'MARQUIS', 'Customizable Reports', 'Reports', 'The Bank MQ', and 'Philip's Test'. Red arrows point from the 'Customizable Reports' and 'Reports' sub-sections to the corresponding items in the callout box. The background shows the same list of customizable reports as in the previous screenshot.</p> |

MARQUIS

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| | <ul style="list-style-type: none"> Note: "Customizable Reports" are templates that can be altered and "Reports" are templates that cannot be altered |
| Step 6 | Select and click on the report name in Bold |
| Step 7 | If filter is needed, then continue to the next sub step. If not, then go to Step 8 |
| 7.1 | Click on Filters on the top left side |
| 7.2 | Click and hold on the three dots in the center of the filter box and pull down to reveal additional filters if available |
| 7.3 | To modify specific filter criteria, click on the down arrow to produce a drop-down menu and make your selection(s) |
| 7.4 | Click on the "Update Result" button in top right menu |
| |  <p>The screenshot shows the MARQUIS reporting interface. At the top left, there is a 'Filters' button (7.1). Below it, there are four filter boxes: 'Period Name' (Current), 'Status Name' (Active), 'Bank Name' (Select...), and 'Region Name' (Select...). Each filter box has a dropdown arrow (7.3). At the top right, there is an 'Update Result' button (7.4). Below the filter boxes, there is a three-dot menu (7.2) and a 'Preview Records' dropdown set to 100. At the bottom left, there is a 'Report Filter Info' section listing the selected filters: 1 Period Name = Current, 2 Status Name = Active, 3 Bank Name =, 4 Region Name =.</p> |
| Step 8 | Scroll down on the page to review the Report Filter Criteria |
| Step 9 | Continue scroll down on the page to review report |
| Step 10 | If export/print is needed, then continue to the next sub step |
| 10.1 | Click on "Export" in the top right menu |
| 10.2 | Select type of export (Excel, PDF, CSV) |
| 10.3 | Once the document has been exported, Open, Save, Print and/or Share |