

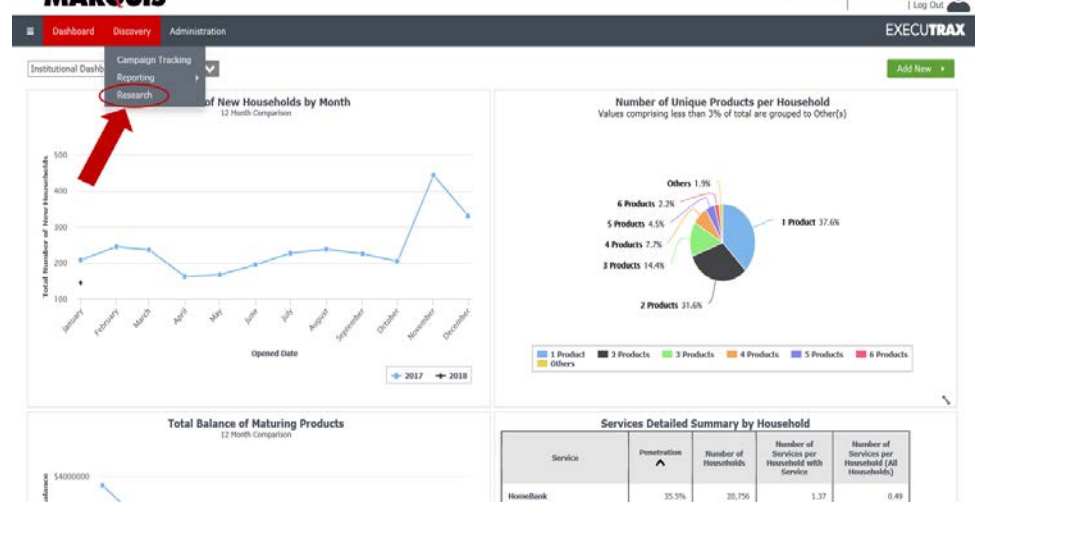
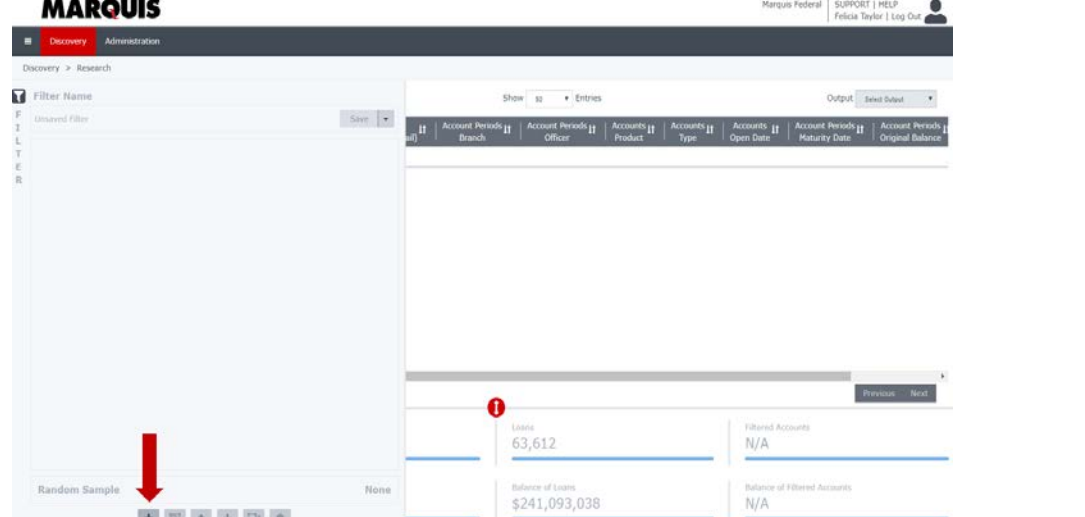


FILTERING

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MARQUIS

MNET607	Building a Filter
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	Click on “Research” .
	 <p>The screenshot shows the Marquis Discovery menu. The 'Research' option is highlighted with a red circle and a red arrow pointing to it. The menu also includes 'Campaign Tracking Reporting' and 'Institutional Dash'. The background shows a dashboard with various charts and tables.</p>
Step 4	Click on the “plus symbol” located in the bottom left hand side of the page to add a new filter condition box.
	 <p>The screenshot shows the Marquis Research page. A filter dialog box is open, and a red arrow points to the plus sign at the bottom left of the dialog box. The dialog box has a 'Filter Name' field and a 'Save' button. The background shows a table of accounts with columns for 'Account Periods', 'Branch', 'Officer', 'Product', 'Type', 'Open Date', 'Maturity Date', and 'Original Balance'.</p>
Step 5	Double click on the empty “condition box” and a three-step box will appear with Field, Operator and Value.
Step 6	In the Field box, click the “drop-down arrow” to select a field.
6.1	The fields available will be account, household, individual, user defined and any appended fields such as demographic, P\$YCLE or Propensity data.

MARQUIS

The screenshot shows the MARQUIS interface with the 'Filter Name' section active. A red arrow points to the 'New Filter' box, and another red arrow points to the 'Field' dropdown menu. The interface includes a navigation bar with 'Dashboard', 'Discovery', and 'Administration'. Below the filter section, there are summary statistics for 'Loans' and 'Filtered Accounts'.

Category	Value
Loans	63,612
Filtered Accounts	N/A
Balance of Loans	\$241,093,038
Balance of Filtered Accounts	N/A

Note: Typing into the box will apply a search function to easily locate a field, operator or value.

Step 7 Click the **“drop down arrow”** to select the Operator.

Step 8 Type in the **“Value”** or click the **“drop down arrow”** to select a lookup value.

The screenshot shows the MARQUIS interface with the 'Filter Name' section active. A red arrow points to the 'Value' dropdown menu. The interface includes a navigation bar with 'Discovery' and 'Administration'. Below the filter section, there are summary statistics for 'Filtered Accounts' and 'Balance of Filtered Accounts'.

Category	Value
Filtered Accounts	N/A
Balance of Filtered Accounts	N/A

Note: Typing in the box will apply the search function to make it easier to locate specific values.

Step 9 Click Done.

Step 10 To add more filter conditions, click the **“plus symbol”** and another conditions box will appear.

10.1 The default connector is **“AND”**. To switch it to **“OR”**, click on the connector to toggle between connector options.

MARQUIS

<p>10.2</p>	<p>To group 2 or more “OR” statements, place a check mark in the “boxes to the right of the filter conditions”.</p>
<p>10.3</p>	<p>Click the “Group Conditions” button, located directly to the right of the plus symbol.</p>
<p>Step 11</p>	
<p>Step 12</p>	<p>To apply the filter, click the drop-down arrow next to “Save” and select “Activate”.</p> <p>To view the filtered data, click the “Filter button” to toggle it out of the way.</p>

MARQUIS

The screenshot displays the MARQUIS Discovery Administration interface. At the top, there is a navigation bar with 'Discovery' and 'Administration' tabs. The main content area shows a search results table for accounts. A red arrow points to the 'Accounts Default' dropdown menu. Below the table, there are summary statistics for Households, Deposits, Loans, and Filtered Accounts.

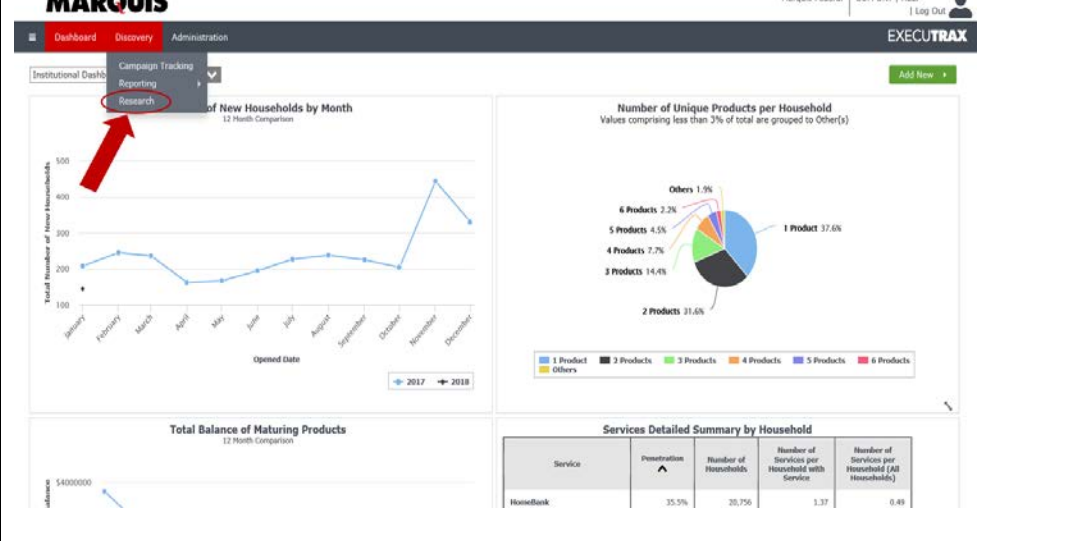
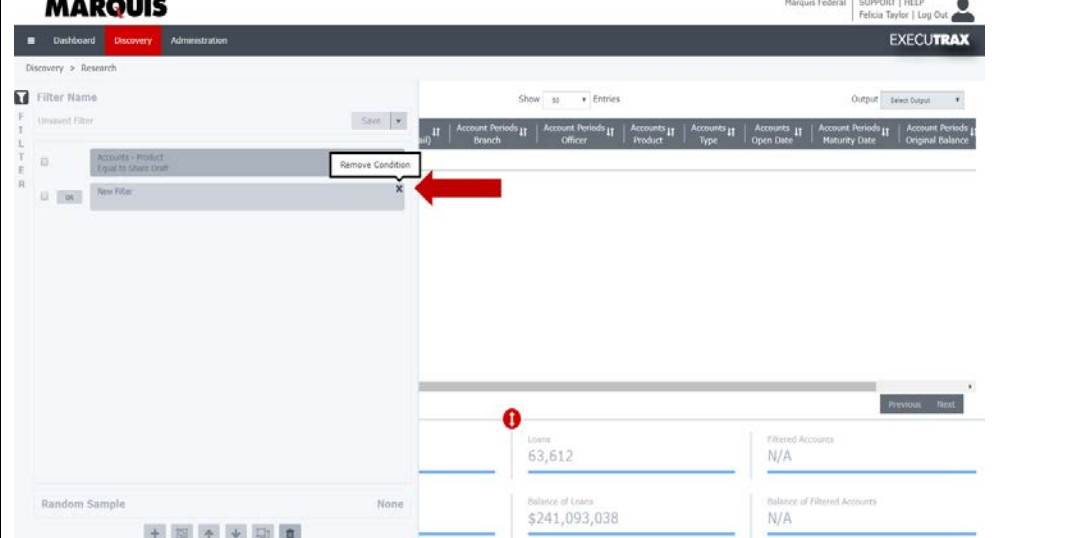
Account Periods Status	Households Name	Accounts City	Accounts State Code	Accounts Style (Business/Retail)	Accounts Branch	Account Periods Officer	Accounts Product	Accounts Type	Accounts Open Date	Acc Mat
Closed	Kiaa Erica Lagros	Columbus	OH	Retail	Mansfield	Robert Days	Share Draft	Personal Checking	9/14/2017	
Closed	Josh Deatree Troutel	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/13/2017	
Closed	Labadie Cummings And Greenholt Inc	Columbus	OH	Business	Downtown	Paul Basinger	Share Draft	Business Checking	7/18/2017	
Closed	Hale Jeff Troutel II	Hilliard	OH	Retail	Parkway	Joanie Wilson	Share Draft	Personal Checking	5/19/2017	
Closed	Elexa Heidi Tillman	Pickerington	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	1/8/2018	
Closed	Antonietta Katrine Hilpert	Columbus	OH	Business	Downtown	Paul Basinger	Share Draft	Business Checking	5/25/2017	
Closed	Laurie Alejandrin Gleason	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/20/2017	
Closed	Emery Rice Stosin	Canal Winchester	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	6/21/2017	
Closed	Frami And Sons Group	Columbus	OH	Business	State Street	Paul Basinger	Share Draft	Business Checking	10/24/2017	
Closed	Lauren Hpolito Smith	Westerville	OH	Retail	Clintonville	Theodore Morris	Share Draft	Personal Checking	5/18/2017	
Closed	Maroua Major Murazik	Reynoldsburg	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	5/22/2017	
Closed	Antonietta Katrine Hilbert	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/13/2017	

Showing 1 to 50 of 31,839 entries

Households	Deposits	Loans	Filtered Accounts
24,742	31,839	0	31,839
Individuals	Balance of Deposits	Balance of Loans	Balance of Filtered Accounts
27,300	\$38,787,867	\$0	\$38,787,867

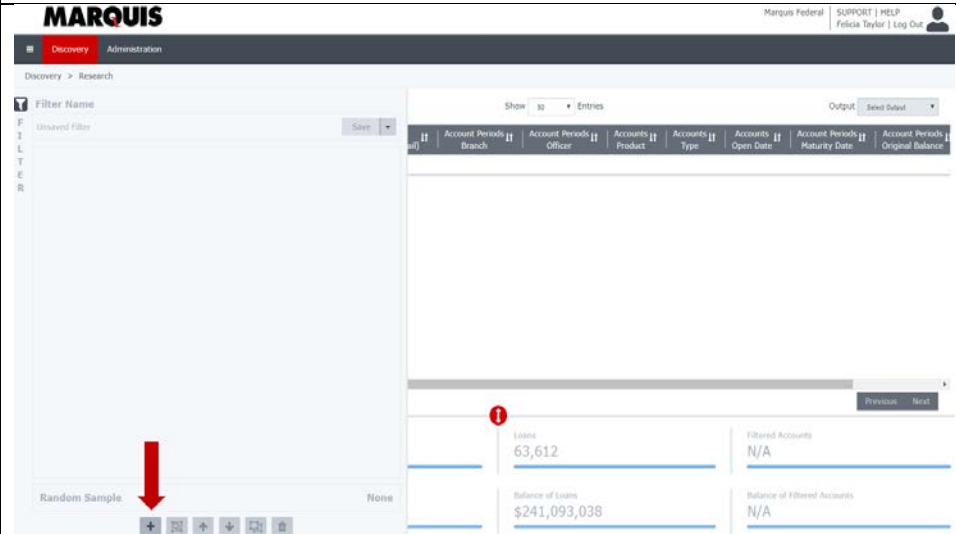
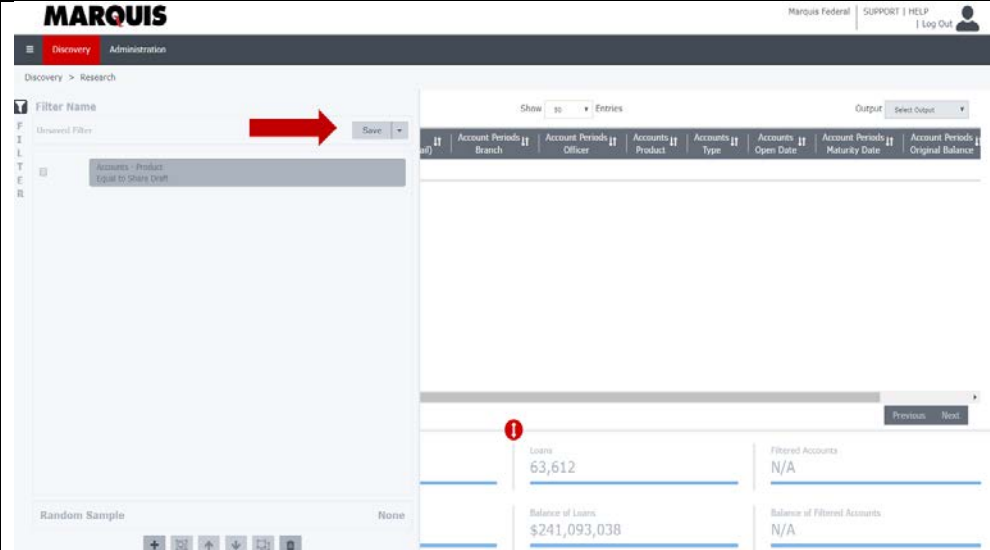
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MARQUIS

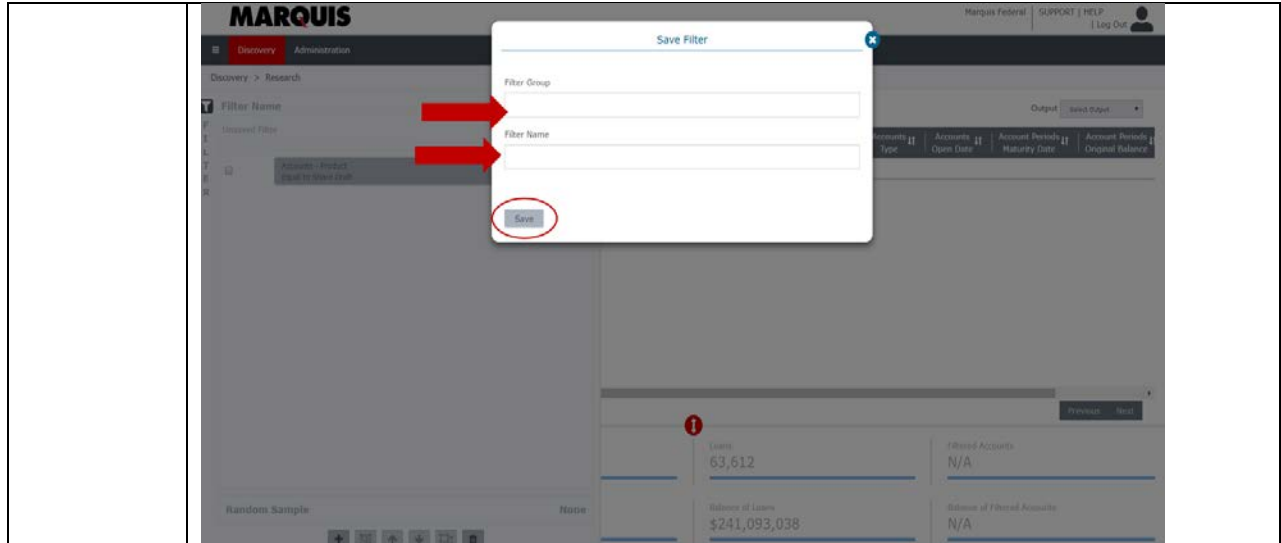
MNET608	Removing a Filter Condition
Order of Steps	Tasks
Step 1	Log into Marquis Next.
Step 2	Click on “Discovery” on left side of menu bar to display drop down menu.
Step 3	Click on “Research”.
	 <p>The screenshot shows the Marquis dashboard with the 'Discovery' menu open. The 'Research' option is highlighted with a red circle and a red arrow. The dashboard includes a line chart for 'Total Number of New Households by Month', a pie chart for 'Number of Unique Products per Household', and a table for 'Services Detailed Summary by Household'.</p>
Step 4	Click on the “plus symbol” located in the bottom left hand side of the page to add a new filter condition box.
Step 5	Double click on the empty “condition box”.
Step 6	Select your “field, operator and value”. Click Done.
Step 7	To remove the condition, click the “X” in the upper right hand corner of the condition box.
	 <p>The screenshot shows the 'Filter Name' dialog box in Marquis. A condition box for 'Accounts - Product' is visible. A red arrow points to the 'X' icon in the top right corner of the condition box, which is used to remove the condition. The dialog also shows a table of filter conditions and a 'Random Sample' button.</p>

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MARQUIS

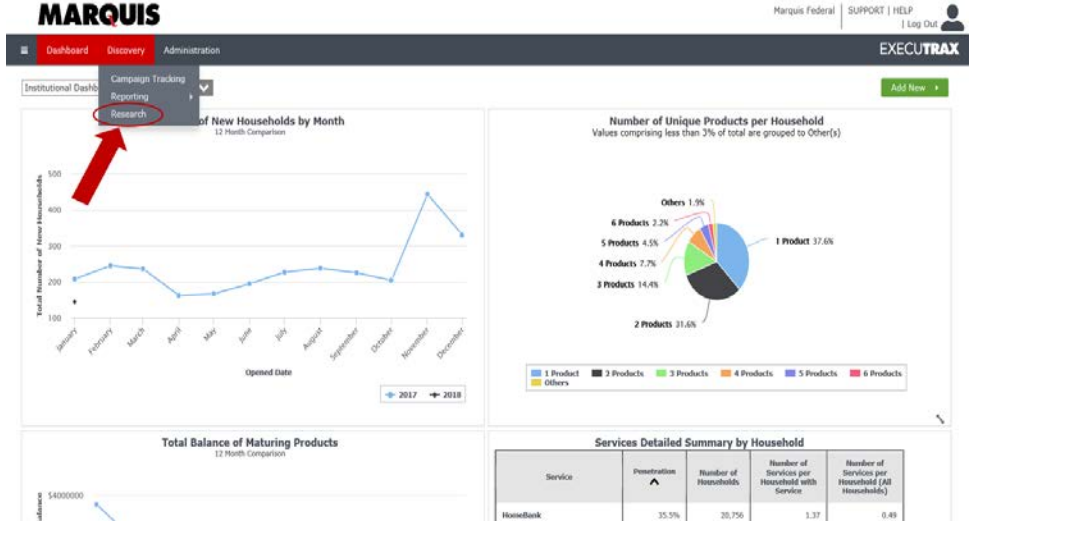
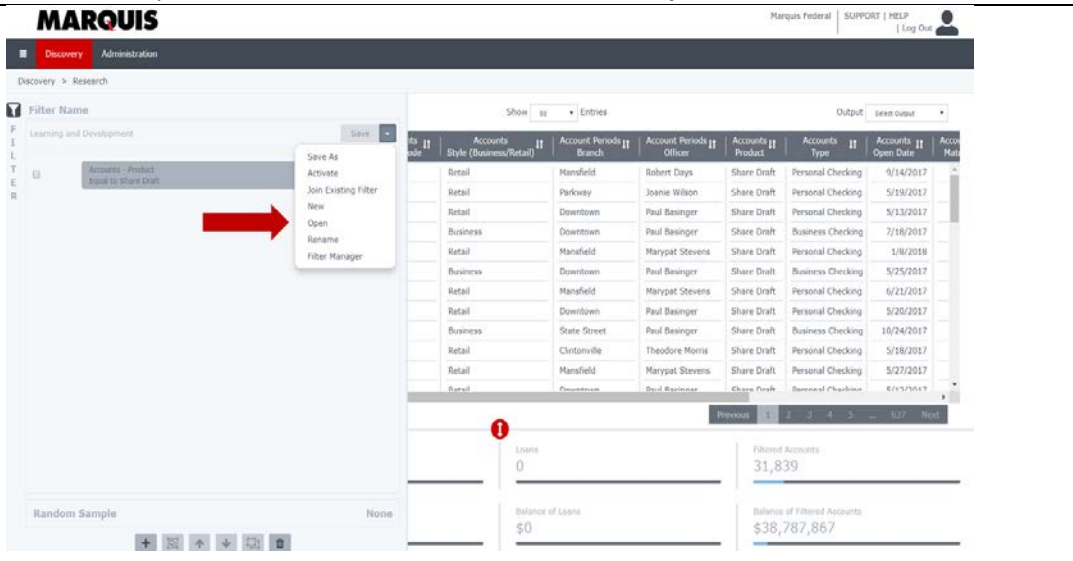
MNET609	Saving a Filter
Order of Steps	Tasks
Step 1	Log into Marquis Next .
Step 2	Click on " Discovery " on left side of menu bar to display drop down menu.
Step 3	Click on " Research ".
Step 4	Click on the " plus symbol " located in the bottom left hand side of the page to add a new filter condition box.
	
Step 5	Double click on the " empty condition box " and a three-step box will appear with Field, Operator and Value.
Step 6	Select your " field ", " operator " and " value ". Click Done .
Step 7	Click the " Save " button.
	
Step 8	Click the drop-down arrow to select a " Group " OR type in a new " Group Name ".
Step 9	Type in a unique " filter name ".
Step 10	Click Save to complete the saving process.

MARQUIS



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MARQUIS

MNET610	Opening a Saved Filter
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	Click on “Research”.
	 <p>The screenshot shows the Marquis dashboard with the 'Discovery' menu open. The 'Research' option is highlighted with a red circle and a red arrow. The dashboard contains several charts and tables, including a line chart for 'Total Number of New Households by Month', a pie chart for 'Number of Unique Products per Household', and a table for 'Services Detailed Summary by Household'.</p>
Step 4	Click the drop down arrow next to “Save” and select “Open”.
	 <p>The screenshot shows the 'Filter Names' dialog box in the Marquis interface. The 'Save' dropdown menu is open, and the 'Open' option is selected with a red arrow. The background shows a table of account data with columns for Account Style, Branch, Officer, Product, Type, and Open Date.</p>
Step 5	Click on a filter from the list.
5.1	Click in the “Search” box to type in a name of a filter or click on the drop-down arrow by “Filter Group” to isolate filters within a specific group.

MARQUIS

Open Filter

Filter Group Search

Name	Fields	# of Records	Last Activation Date	Last Changed By	Last Chg Date
Deposits	Accounts - Product Type (Loan/Deposit), Account Periods - Status	0			06
Growth potential	Household Periods - Total Balance, Account Periods - Branch, Househ...	0	10/23/2018		07
Learning and Develop...	Accounts - Product	31,839		rtaylor	10
Status is Active	Account Periods - Status	213,216		jgriffin	10

Step 6 Click on the filter once to select it.

6.1 Once selected, the filter will automatically apply.

Step 7 To view the filtered data, click the **"Filter button"** to toggle it out of the way.

MARQUIS

Discovery > Research

accounts Default Show as Entries


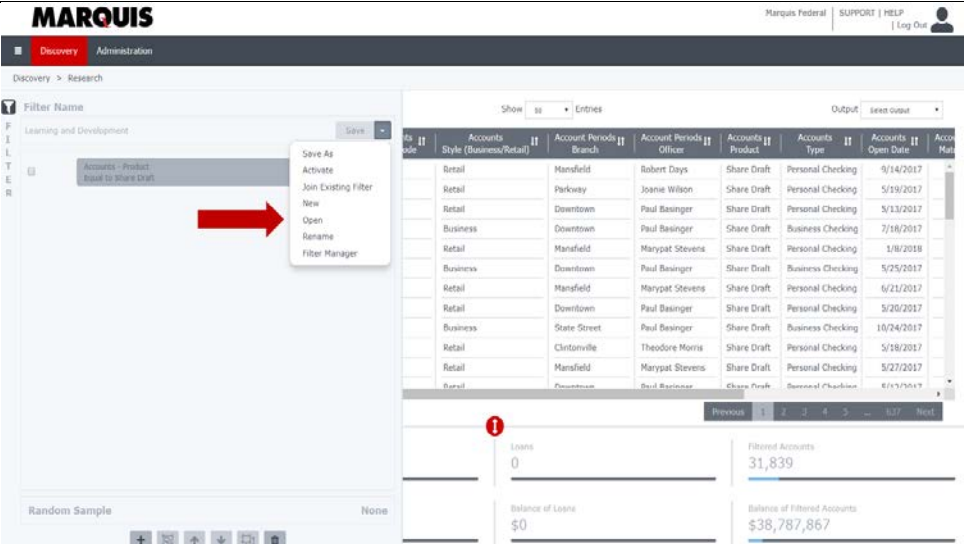
Account Periods Status	Households Name	Accounts City	Accounts State Code	Accounts Style (Business/Retail)	Account Periods Branch	Account Periods Officer	Accounts Product	Accounts Type	Accounts Open Date	Account Mail
Closed	Kiaa Erica Lagros	Columbus	OH	Retail	Mansfield	Robert Days	Share Draft	Personal Checking	9/14/2017	
Closed	Josh Destinee Treutel	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/13/2017	
Closed	Labadie Cummings And Greenholt Inc	Columbus	OH	Business	Downtown	Paul Basinger	Share Draft	Business Checking	7/18/2017	
Closed	Hale Jeff Treutat II	Hilliard	OH	Retail	Parlway	Jeanie Wilson	Share Draft	Personal Checking	5/19/2017	
Closed	Elexa Heidi Tillman	Pickerington	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	1/8/2018	
Closed	Antonietta Katrine Hilpert	Columbus	OH	Business	Downtown	Paul Basinger	Share Draft	Business Checking	5/25/2017	
Closed	Laurie Alejandrin Gleason	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/20/2017	
Closed	Emery Rex Strovin	Canal Winchester	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	6/21/2017	
Closed	Frank And Sons Group	Columbus	OH	Business	State Street	Paul Basinger	Share Draft	Business Checking	10/24/2017	
Closed	Lauren Hpolito Smith	Westerville	OH	Retail	Clintonville	Theodore Morris	Share Draft	Personal Checking	5/18/2017	
Closed	Marcus Major Murazik	Reynoldsburg	OH	Retail	Mansfield	Marypat Stevens	Share Draft	Personal Checking	5/22/2017	
Closed	Antonietta Katrine Hilpert	Columbus	OH	Retail	Downtown	Paul Basinger	Share Draft	Personal Checking	5/13/2017	

Showing 1 to 50 of 31,839 entries

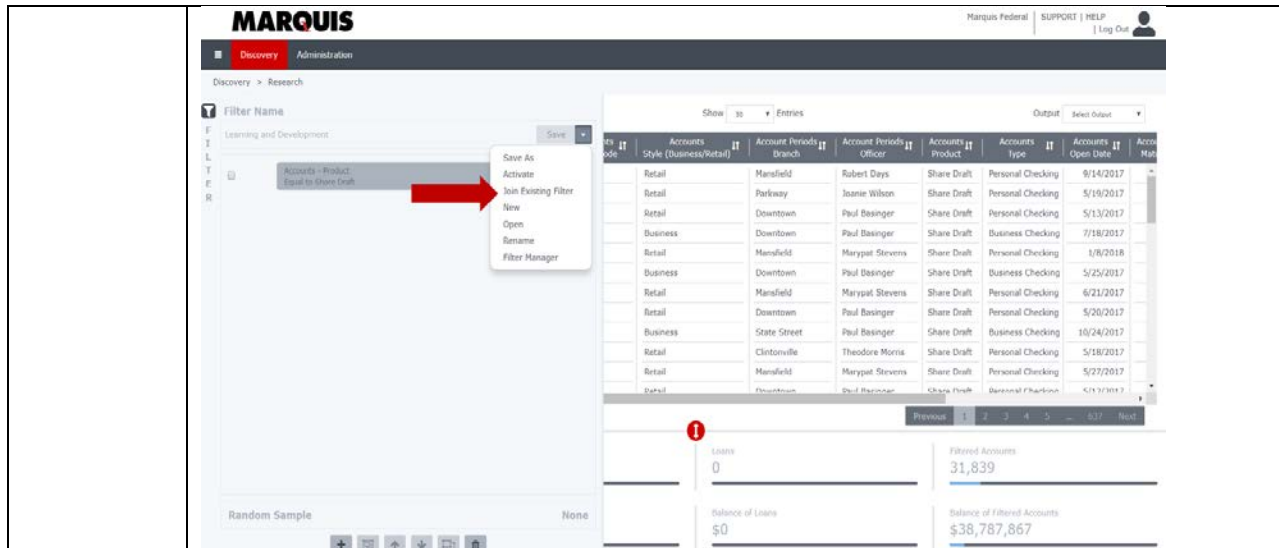
Households 24,742	Deposits 31,839	Loans 0	Filtered Accounts 31,839
Individuals 27,300	Balance of Deposits \$38,787,867	Balance of Loans \$0	Balance of Filtered Accounts \$38,787,867

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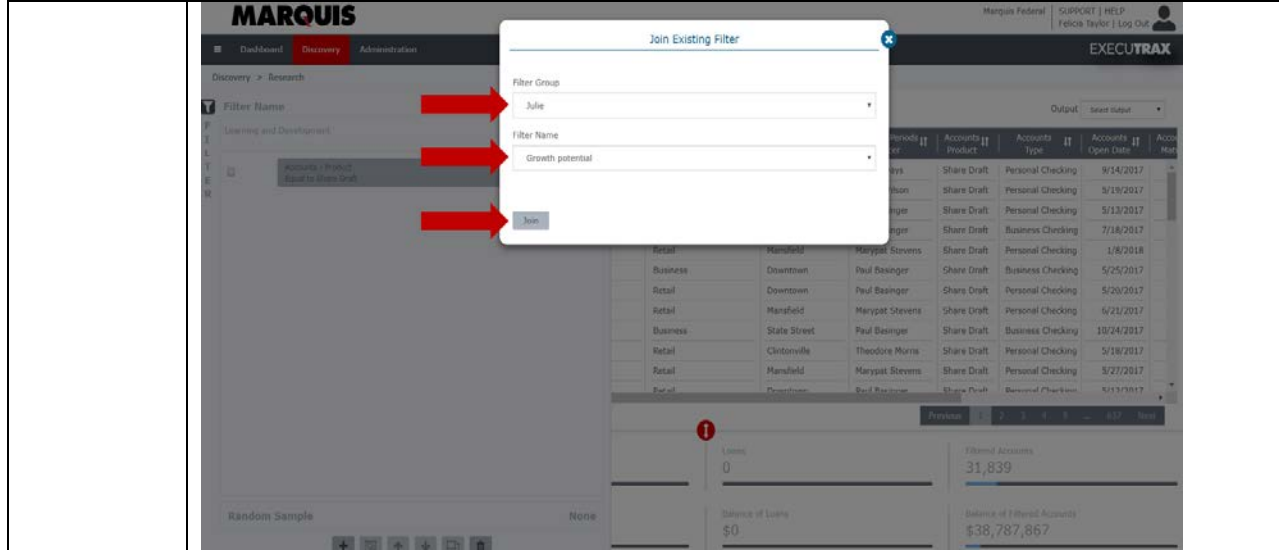
MARQUIS

MNET611	Join Existing Filter
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	Click on “Research”.
	 <p>The screenshot shows the Marquis dashboard with the 'Discovery' menu open. The 'Research' option is highlighted with a red circle and a red arrow. The dashboard includes a line chart for 'Total Number of New Households by Month', a pie chart for 'Number of Unique Products per Household', and a table for 'Services Detailed Summary by Household'.</p>
Step 4	Click the drop down arrow next to “Save”.
Step 5	Click on “Open”.
	 <p>The screenshot shows the 'Discovery > Research' page. A dropdown menu is open next to the 'Save' button, and the 'Open' option is highlighted with a red arrow. The page displays a table of account data and summary statistics.</p>
Step 6	Click on a filter from the list to select it.
Step 7	Click the drop-down arrow next to “Save” and select “Join Existing Filter”.

MARQUIS



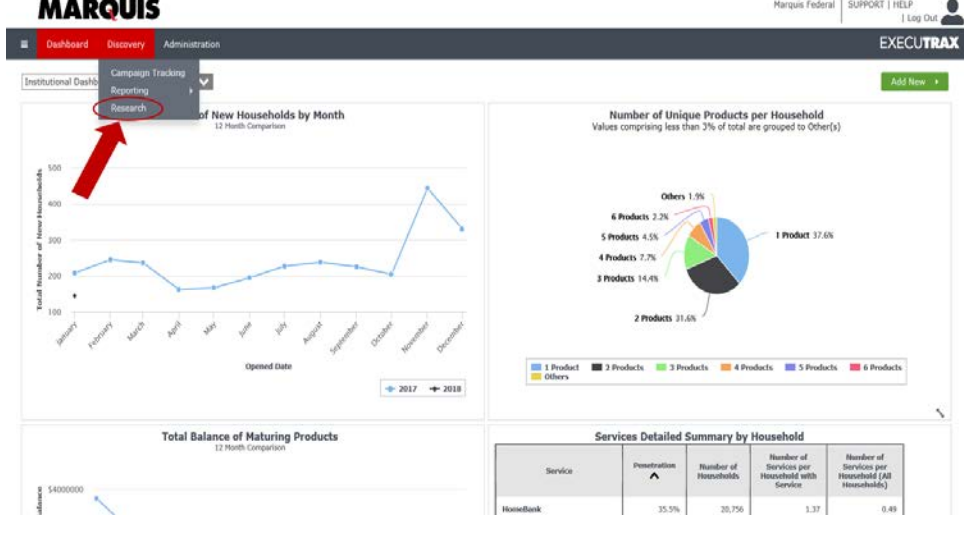
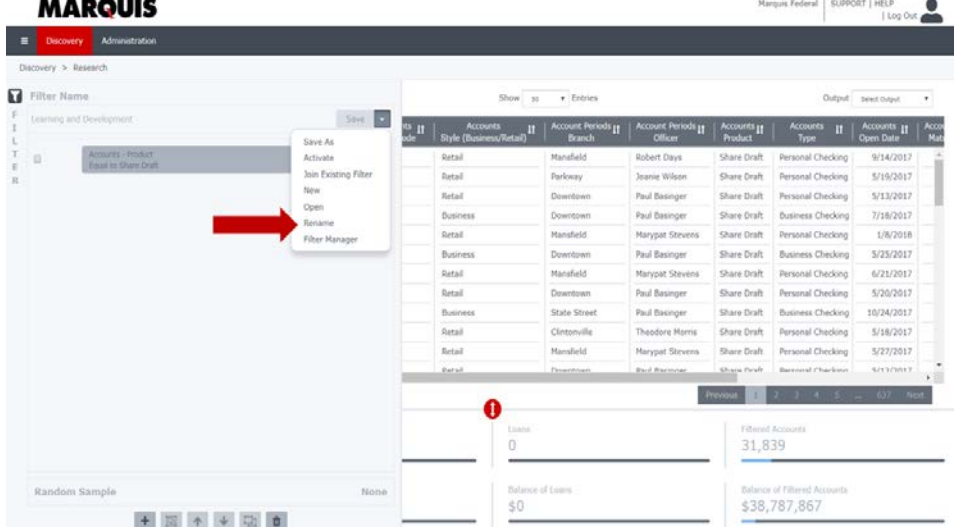
- Step 8** Click the drop-down arrow next to **"Filter Group"** to select the group.
- Step 9** Click the drop-down arrow next to **"Filter"** to see the list of filters in the selected group.
- Step 10** **Highlight** the filter you want to join.
- Step 11** Click the **"Join"** button on the bottom left of the box.



- 11.1** The filter joined will be appended to the bottom of filter condition boxes.


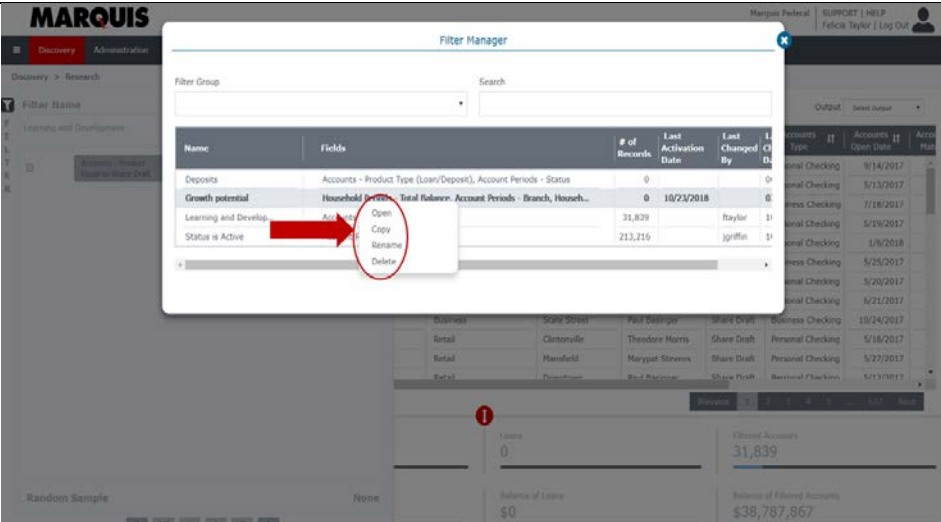
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MARQUIS

MNET612	Renaming a Filter
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	Click on “Research”.
	 <p>The screenshot shows the Marquis dashboard with the 'Discovery' menu open. The 'Research' option is highlighted with a red circle and a red arrow. The dashboard includes a line chart for 'Total Number of New Households by Month', a pie chart for 'Number of Unique Products per Household', and a table for 'Services Detailed Summary by Household'.</p>
Step 4	Click the drop down arrow next to “Save”.
Step 5	Click on “Open”.
Step 6	Click on a filter from the list to select it.
Step 7	Click the drop-down arrow next to “Save” and select “Rename”.
	 <p>The screenshot shows the 'Filter Manager' interface. A dropdown menu is open next to the 'Save' button, and the 'Rename' option is highlighted with a red arrow. The interface includes a list of filters, a table of account data, and summary statistics for filtered accounts.</p>
Step 8	Make any necessary changes to the name and click Save to apply the new name.

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MARQUIS

MNET613	Filter Manager
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	Click on “Research”.
	 <p>The screenshot shows the Marquis dashboard with the 'Discovery' menu open. A red arrow points to the 'Research' option. The dashboard includes a line chart for 'Total Number of New Households by Month', a pie chart for 'Number of Unique Products per Household', and a table for 'Services Detailed Summary by Household'.</p>
Step 4	Click on the drop-down arrow next to “Save” and select “Filter Manager”.
Step 5	Click on any filter and 4 options will display to choose from: Open, Copy, Rename, Delete.
	 <p>The screenshot shows the 'Filter Manager' window. A table lists filters with columns for Name, Fields, # of Records, Last Activation Date, and Last Changed By. A context menu is open over the 'Growth potential' filter, showing options: Open, Copy, Rename, and Delete. A red arrow points to the 'Copy' option.</p>

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