Information Reporting

Business Online Banking Brought to You by *myTrustmark® Business*

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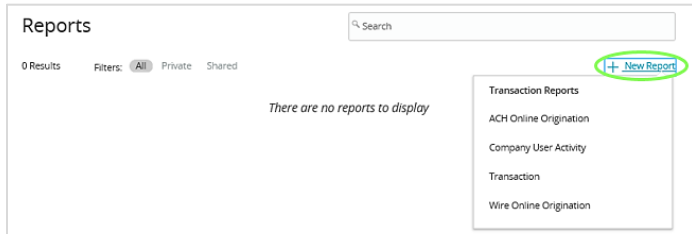
1. Select ***Reports.***

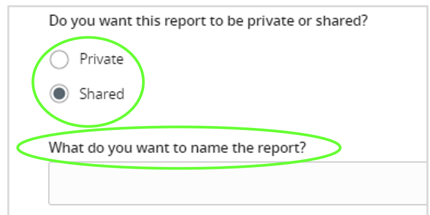
2. Select ***+New Report*** and the desired report from the drop-down list.

   NOTE: Reports provided will be based on segment level.

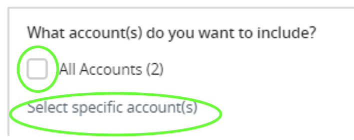


3. Select the ***Privacy Option*** for this report and ***Name the Report***.

   NOTE: Shared means all users in the same User Role may view the report. Private is only viewable to you.

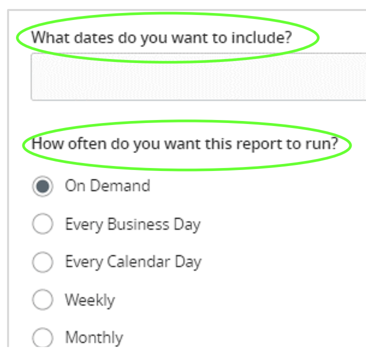


4. Select the accounts to include in the report by selecting ***All Accounts*** or the ***Select specific account(s)*** link.



5. Select the ***Date Range*** for the report.

   NOTE: Custom Dates allows the user to select a specific date range, i.e. March 1 – March 5.

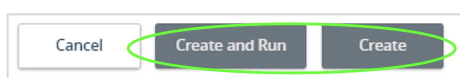


6. Select the desired schedule for the report to automatically run.

7. Select ***Create and Run*** to generate the report immediately. Select ***Create*** to schedule the report without immediately generating the report.

   NOTES: The report will display as ***In Progress*** while it is being generated.

   You will need to navigate to another screen and return to the ***Reports*** screen to access the report.



8. The format icon(s) (PDF, etc.) will appear next to the scheduled report once it has been generated. Select the ***Download*** type to open or save the report.

9. Select the ***kebab*** icon within the Actions column to edit the existing report, view history, copy or delete the report.

10. To save the Report as a Favorite select the ***Star*** icon.