**Bristol County Savings Bank Internal Report Request Form**

Instructions: All report requests must be submitted on an Internal Report Request Form. Please complete all of the fields, providing specific detail in the “Report Detail” section. Email this form, and any report samples or screen shots, to [**Report.Request@bcsbmail.com**](mailto:Report.Request@bcsbmail.com)

Submitted date: 9/10/2025 Requestor name: Cori Clayton

Type of request:  New  Modify existing (report name): Click to enter text.

Business area: Marketing

Purpose: Strategic initiative Project Name: North Raynham Branch Reconstruction Project

Proposed start date: Click enter a date. Proposed due date: 9/20/2019

Output format:  PDF  Excel  iDashboard

|  |  |  |
| --- | --- | --- |
| Most recent business day | Most recent end-of-month | Specific Date: Click to enter a date. |
| Date Range: From: Click to enter a date. To: Click to enter a date. | | |

Report data as of:

Will this be a recurring report? No

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Daily | Weekly | Monthly | Quarterly | Yearly |
| Other: Click to enter text. | | | | |

If yes, frequency:

***Report Detail:***

|  |  |
| --- | --- |
| **Specific business need:**  Describe the business situation to be addressed by the report. | Inform customers assigned to or have recently transacted at North Raynham of upcoming branch construction plans and impact to services |
| **Request goal:**  How will the business benefit from the report? | We will be able to properly set customer expectations of their North Raynham branch experience and create excitement/awareness around the reconstruction. |
| **Required fields:**  Provide the required fields names or description. | First name, last name, address, city, state, zip |
| **Field sort:**  Describe how the information should be sorted (account number, name, branch, etc.). | Include the following parameters: Customers assigned to North Raynham, those who have transacted at North Raynham within the last 90 days, those will personal/businesses addresses within 5 miles of North Raynham, Raynham Center, & Taunton Main office, Those who own a safe deposit box at North Raynham |
| **Account Status:**  Check off account status(es) to include. | Active  Dormant  Non-Performing (non-accrual)  Closed  Charged-off |

To be completed by Report Writer

|  |  |  |
| --- | --- | --- |
| Job # | Date Submitted: | Date Assigned: |
| Created by: | | |
| Data Source(s) Used (COCC table name, etc): | | |
| Criteria/Filter: | | |
| Validation: | | |
| Output scheduled/saved (include schedule detail): | | |
| Draft submitted date: | Final delivery date: | |
| Final approval by: | | |