**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: 6/9/2025 Requestor name: Kati Kelley

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

Business area: Marketing

Purpose: Strategic initiative Project Name: Business Acquisition Campaign Pilot

Proposed start date: 6/9/2025 Proposed due date: 7/3/2025

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. | We are kicking off the SMB Prospecting Campaign Pilot and want to inform our vendor/partner what types of existing small businesses we serve currently, by NAICS code, in order to inform our plans for acquisition listbuy. For our roughly 3,000 business customers…are you able to provide me a report showing percentage of business customers in each of the NAICS codes? Chad- Please call if need to talk this through |
| **Request goal:**  How will the business benefit from the report? | Click to enter text. |
| **Required fields:**  Provide the required fields names or description. | Click to enter text. |
| **Field sort:**  Describe how the information should be sorted (account number, name, branch, etc.). | Click to enter text. |
| **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: | | |