**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: 12/17/2024 Requestor name: Stephanie Nordberg

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

Business area: Retail

Purpose: Strategic initiative Project Name: New Business TINs by Branch

Proposed start date: 1/1/2025 Proposed due date: 1/31/2025

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? Yes

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 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. | Retail is looking to assign goals and track new business relationship growth and need a report to track. Dave Medeiros has discussed his needs with Bill Muto and Chad D |
| **Request goal:**  How will the business benefit from the report? | To be able to track new business relationship growth for the branches |
| **Required fields:**  Provide the required fields names or description. | Chad has been provided a list of all required fields |
| **Field sort:**  Describe how the information should be sorted (account number, name, branch, etc.). | Account Officer |
| **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: | | |