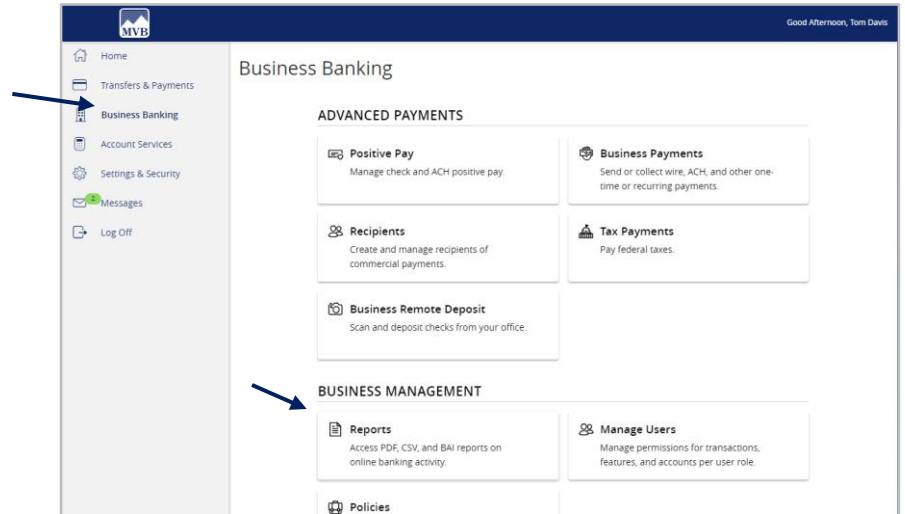


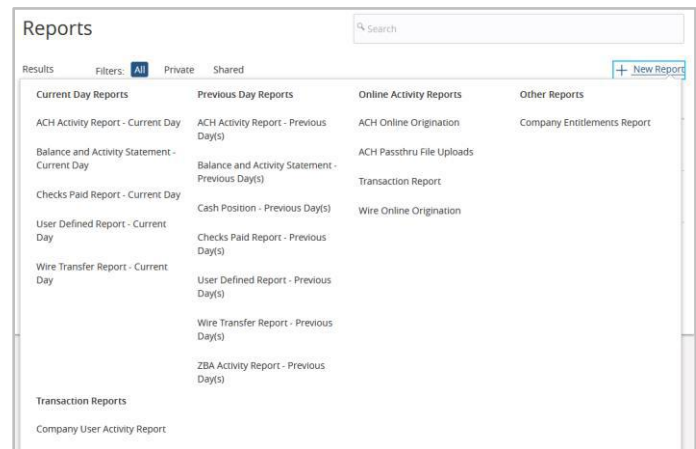


Reports Setup Process

1. Select the 'Business Banking' menu, then select 'Reports'.



2. Click the 'New Report' link and select the desired report from the list.



Questions? Please contact Client Support at 1-844-682-2265 or ClientSupport@MVBBanking.com.



3. Indicate whether the report is Private or Shared.
4. Enter the desired name for the report.
5. Indicate which accounts need to be included in the report.

NOTE: This step only corresponds with reports associated with account information.

- a. Click the 'All Accounts' box to include all available accounts in the report.
- b. Click the 'Select specific account(s)' link to choose individual accounts to be included in the report.
- c. Select the accounts to be included in the report. Either select by label or by individual account, then Submit.

This report will generate the following file formats: PDF, CSV Change report type

Do you want this report to be private or shared?

Private

Shared

What do you want to name the report?

What account(s) do you want to include?

All Accounts (3)

Select specific account(s)

What dates do you want to include?

How often do you want this report to run?

On Demand

Every Business Day

Every Calendar Day

Weekly

Monthly

Cancel Create and Run Create

SELECT ACCOUNT(S)

Showing: All Selected

Select accounts by labels:

Sample

Accounts:

Select all | Clear all

FOUNDATION CHECKING 4837

COMMERCIAL LOC 360 0356

STATEMENT SAVINGS 4495

0 accounts selected

Cancel Submit

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6. Select the date(s) to be included in the report.
 - a. Select one of the dynamic date range options. (A rolling date range that shifts in accordance with the current day)

NOTE: Information can be pulled as far back as the oldest transaction that exists within Online Banking for the respective account(s).

What dates do you want to include?

- Last Business Day
- Last Week
- Last Month
- Last 30 Days
- Last 60 Days
- Last 90 Days
- Custom Dates

7. Select how often the report should run.
8. Select 'Create and Run' to run the report immediately and to save the recurrence. Or select 'Create' to schedule the report without immediately running it.

How often do you want this report to run?

On Demand

Every Business Day

Every Calendar Day

Weekly

Monthly

Cancel Create and Run Create

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- The report will display as either 'Queued', 'In Progress', or 'Never Run' while it is being generated, depending on how many reports are currently being generated.
- Click the 'Actions' option to View History, Run On-Demand, Edit, Copy, or Delete the specific report.

The screenshot shows a web interface titled 'Reports' under the heading 'Information Reports'. It includes a search bar, filter options (All, Private, Shared), and a '+ New Report' button. A table lists reports with columns for Name, Last Run, Download, and Type. An 'Actions' column is open for the first report, showing options: View History, Run Now, Edit, Copy, and Delete.

Name	Last Run	Download	Type	Actions
Demo Sample	11/15/2023	PDF CSV	Transaction Report: Report on Various Transaction Types	View History Run Now Edit Copy Delete
Sample	11/15/2023	PDF CSV	ACH Transactions originated in Online Banking	
Sample	Never Run		Transaction Report: Report on Various Transaction Types	

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