

How to Create a Claims Summary Report

- After logging into My Estes, go to the **Online Reporting** page. 1.
- 2. Click Create a Report and select Claims Summary.

- Next, give your report a name, by filling in the **Report Name** field. 3.
- Users with access to multiple accounts can choose to run reports 4. that include data for all accounts, or data for a specific account only.
- If you'd like to keep all available data columns as they appear by 5. default, click **Save Report**. If you'd like to customize the layout

of your report, please see the How to Customize your Claims Summary Report section of this guide.

- You can generate a report any time you would like to see a real-time 6. snapshot of your data. To download a copy of your report directly to your desktop, click the Download Report button at the bottom of the screen.
- 7. Or for detailed instructions on how to schedule reports, please see the How to Schedule Your Claims Summary Report section of this guide.

| | My Reports | Create a Report | | | |
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How to Customize Your Claims Summary Report

- When you first create your report, all of the available data columns will be presented to you. These columns may be removed, rearranged, or filtered to meet your needs.
- 2. If you'd like to customize the data you see in your report, click the **Fields** icon, just above the data fields on the right hand side.
- This will pull up a list of possible data field columns. To de-select a column, simply click the **check box** to the left of its name. You can also de-select all columns by unchecking the **Select All** box.

Please note: Removing fields from your report does not remove the data from our system. Should you wish to restore any data fields you've previously removed, simply click on the Fields icon, and re-select the data fields you'd like to see.



- If you would like to reorder the data fields, start by clicking on the column name to select the column. Without releasing the click, drag the column to its desired location.
- 5. At any time during the customization process, you can view your report in fullscreen mode. Simply click the **Fullscreen** icon immediately to the right of the Fields icon.
- When you're finished customizing the layout of your report, be sure to save your changes. To do this, click **Save Report** on the bottom right side of your screen.

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How to Schedule Your Claims Summary Report

- 1. Once you've saved your report, you can create a schedule by which it is sent to specific recipients at the frequency of your choosing. To do this, click Schedule Report on the bottom right side of your screen.
- 2. To set your **report frequency**, use the drop-down menu to select whether you'd like to run the report daily, weekly, or monthly. Note that reports will be run at 4:00 a.m. EST on the dates selected.
- You can also set your report duration by choosing whether you want 3. to run your report just once, until a specific end date, or indefinitely.
- Once you've created a schedule, you can choose that your report 4. be sent to as many as ten recipients by entering their email addresses into the designated field (one per line).
- Finally, you can use the drop-down menu to choose your 5. preferred report format: Excel worksheet file format (.xlsx) or text/CSV format (.csv).
- 6. After making your selections, click the **Submit** button.

We make it easy for you to create customized reports - then download them on-demand or schedule the directly to your inbox on a daily, weekly, or monthly basis. Reports are run at 4 a.m. ET daily.

View Invoices for:

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Fictitious Manufacturing

Download Report

All billing accounts

REFRESH REPORT

One Account: Account Number

Claim Type

1 - Shortage

Schedule Report

Create a Report

7. Click Save Report.

Online Reporting

My Reports

elect a Report

Claims Summary

Report Name

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3 1234567

4 1234567 5 1234567

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Showing 13 rows

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Fictitious Manufacturing

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Report Delivery Preferences

Enter up to 10 email addresses (one per line). We will email your report to the provided email addresses, at the frequency requested.

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