

How to Create a Claims Summary Report

1. After logging into My Estes, go to the **Online Reporting** page.
2. Click **Create a Report** and select **Claims Summary**.
3. Next, give your report a name, by filling in the **Report Name** field.
4. Users with access to multiple accounts can choose to run reports that include data for all accounts, or data for a specific account only.
5. If you'd like to keep all available data columns as they appear by 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.
6. You can generate a report any time you would like to see a real-time 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.

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Online Reporting

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

My Reports **Create a Report**

Select a Report
Claims Summary **2**

Report Name * **3**

View Invoices for:
 All billing accounts **4**
 One Account: Account Number Account Search

REFRESH REPORT

Fields Fullscreen

1	2	3	4	5	
Account #	Claimant	Remit	Claim Type	Total Count	Total
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	

Showing 13 rows

6

Download Report Schedule Report **SAVE REPORT** **5**

How to Customize Your Claims Summary Report

1. 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.
3. 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.

4. 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.
6. 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.

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.

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My Reports **Create a Report**

Select a Report: Claims Summary

View Invoices for: All billing accounts One Account: Account Number Account Search

Report Name *

REFRESH REPORT

Fields Fullscreen

1	2	3	4	5	6
Account #	Claimant	Remit	Claim Type	Total Count	Total
1234567	Fictitious Manufacturing	Fictitious Manufacturing	Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1
1234567	Fictitious Manufacturing	Fictitious Manufacturing	1 - Shortage	1	1

Showing 13 rows

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My Reports **Create a Report**

Select a Report: Claims Summary

View Invoices for: All billing accounts One Account: Account Number Account Search

Report Name *

REFRESH REPORT

Fields Fullscreen

Fields APPLY CANCEL

Select and arrange columns

- Select All
- Account #
- Claimant
- Remit
- Claim Type
- Total Count
- Total Requested Amount
- Paid Count
- Paid Amount

Showing 13 rows

Download Report Schedule Report **SAVE REPORT**

