



Track Management Reports

This document provides instructions for using the Reports feature in Track to generate over forty specific Management and tracking reports.

Management Reports	1
Generating Management Reports.....	1
Printing Management Reports	2
Exporting Management Reports	2
Available Management Reports	3
Order Reports – Appraiser.....	3
Order Reports – Client	35
Appraisal Orders By	72

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Management Reports

Management Reports are customizable by client, appraiser, and date range. Run a report as a continuous report or allow Track to insert page breaks between each client and appraiser. Narrow the results by filtering other criteria such as form type, location, job type, or order status.

NOTE: Not all filtering options are available for all reports. Unavailable options are grayed out.


Generating Management Reports

1. Click **Reports** and select **Order Reports - Appraiser**, **Order Reports - Client**, or **Appraisal Orders by**.
2. Select a report.
3. Select the report criteria, select a destination (*Screen* or *Printer*) and click **OK**.

TIP: Multiple criteria may be selected by holding down the **CTRL** key on the keyboard while clicking additional selections.


NOTE: Reports sent to the screen may be printed. See *Printing Management Reports*. Reports sent to the printer print immediately.

Printing Management Reports

1. Click **Reports** and select **Order Reports - Appraiser**, **Order Reports - Client**, or **Appraisal Orders by**.
2. Select the report criteria, selecting *Screen* as the destination, and click **OK**.
3. Click the **Print** icon ()
4. Select the *Print Range* and the *Number of Copies*.
5. Select *Collate Copies* to group the report in sets when printing multiple copies, and click **OK**.

NOTE: Print properties, report orientation (landscape or portrait) and paper size, are hard coded into each report.

Exporting Management Reports

1. Click **Reports** and select **Order Reports - Appraiser**, **Order Reports - Client**, or **Appraisal Orders by**.
2. Select the report criteria, selecting *Screen* as the destination, and click **OK**.
3. Click the **Export** icon ()
4. Select the *Format* and the *Destination* and click **OK**.

Format

Available formats are determined by the programs installed on the computer. Commonly used formats include Comma-separated values (CSV), Text, Rich Text Format, and Tab-separated values.

Destination

Application

Opens the report in the software program that corresponds to the selected *Format*.

Disk File

Saves the report to a specified file directory on the computer.

Exchange Folder

Saves the report to a shared folder on the Exchange server.

Microsoft Mail (MAPI)

Sends the report to the specified email recipient(s). MAPI compliant e-mail is required. Supported e-mail programs include Microsoft Outlook 98 and higher versions, and Eudora.

Available Management Reports

The Reports feature in Track generates over forty specific tracking reports. Select reports from three categories: *Order Reports - Appraiser*, *Order Reports - Client*, or *Appraisal Orders by*. Reports may be printed.

Order Reports – Appraiser

Reports in the *Order Reports – Appraiser* category highlights appraiser criteria: workload, order status, commissions, etc.

Appraiser Workload

The *Appraiser Workload* lists individual orders and subtotals the number of reports and revenue generated per appraiser.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to an appraiser

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser.

The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- File Number
- Due Date
- Form Type
- Subject Address
- Borrower Name
- Client Name
- Appraisal Fee

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraiser Workload**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraiser/Client Fee

The *Appraiser/Client Fee* report lists the total fees per client per appraiser.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to a client and an appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Client

Third: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Subject Address
- Borrower Name
- Form Type
- File Number
- Client Fee
- Appraiser Fee

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraiser/Client Fee.**
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Supervisor/Client Fee

The *Supervisor/Client Fee* report lists the total fees per client per supervisory appraiser.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to a client and a supervisory appraiser

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Client

Third: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Subject Address
- Borrower Name
- Form Type
- File Number
- Client Fee
- Supervisor Fee

Instructions

1. Click **Reports > Order Reports – Appraiser > Supervisor/Client Fee.**
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Incomplete Orders

The *Incomplete Orders* report lists all outstanding orders subtotaling Total Orders and Total Orders Outstanding.

Report Requirements

- No date selection required
- *Signed Date* is blank
- Order assigned to an appraiser
- Order *Status* is not *Cancelled*; *Status* may be blank

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser.

Orders are sorted by

First: Appraiser Code

Second: Client

Third: File Number

Report Data

The following information is listed for each order.

- Assigned Date
- Due Date
- Inspected Date
- Reviewed Date
- Status
- Client
- Borrower Name
- Subject Address
- File Number
- Form Type
- Fees
- Days Overdue

Instructions

1. Click **Reports > Order Reports – Appraiser > Incomplete Orders**.
2. Select all, one, or multiple appraisers and clients.
3. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
4. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
5. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Overdue Orders

The *Overdue Orders* report lists all overdue orders, by appraiser, based on a specified determination date. For example if Signed Date is the determination date, all unsigned orders (Signed Date is blank) are listed as overdue.

Report Requirements

- Initial date selection not required
- *Determination Date* selected on the *Additional Search Criteria* screen
- *Determination Date* blank in the order
- Order assigned to an appraiser

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser.

Orders are sorted by

First: Appraiser Code

Second: Client

Third: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Due Date
- Assigned Date
- Borrower Name
- Client Name
- Subject Address
- Form Type
- File Number
- Days Overdue

Instructions

1. Click **Reports > Order Reports – Appraiser > Overdue Orders**.
2. Select all, one, or multiple appraisers and clients.
3. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
4. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
5. Select the report destination, *Screen* or *Printer*, and click **OK**.
6. Select the *Determination Date* and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Order Status

The *Order Status* report provides the status of each order assigned to an appraiser.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to an appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Client

Third: State

Fourth: File Number

Report Data

The following information is listed for each order.

- Appraiser
- Order Status
- Form Type
- File Number
- Ordered Date
- Due Date
- Subject Address
- Client Name

Instructions

1. Click **Reports > Order Reports – Appraiser > Order Status**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Unassigned Orders

The *Unassigned Orders* report is a listing of all unassigned orders (Appraiser field is blank) in the database.

Report Requirements

- No date selection is required.
- Unassigned orders (*Appraiser* field is blank)

Report Output

The report prints in landscape layout on legal-size paper.

Orders are sorted by

First: Order Date

Second: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Due Date
- Client Name
- Borrower Name
- Subject Address
- Form Type
- File Number
- Fees

Instructions

1. Click **Reports > Order Reports – Appraiser > Unassigned Orders**.
2. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
3. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
4. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraiser Commission Report

The *Appraiser Commission Report* lists individual orders, by appraiser, and includes the Client Fee, Appraiser Fee, Payment Status, and Total Amount Due.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to an appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Ordered Date

Third: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- File Number
- Subject Address
- Form Type
- Days Overdue
- Client Fee
- Appraiser Fee
- Status

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraiser Commission Report**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Supervisor Commission Report

The *Supervisor Commission Report* lists individual orders, by supervisory appraiser, and includes the Client Fee, Appraiser Fee, Payment Status, and Total Amount Due.

Report Requirements

- Beginning (From) and ending (To) dates
- Selected date type entered in the order
- Order assigned to a supervisory appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Ordered Date

Third: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- File Number
- Subject Address
- Form Type
- Days Overdue
- Client Fee
- Supervisor Fee
- Status

Instructions

1. Click **Reports > Order Reports – Appraiser > Supervisor Commission Report**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraisal Turnaround

The *Appraisal Turnaround* report lists the number of reports, the average turnaround time in days, and the total revenue generated per appraiser.

Report Requirements

- Beginning (From) and ending (To) dates
- Order assigned to an appraiser
- *Cancelled Date* blank, and the order *Status* is not *Cancelled*; *Status* may be blank
- *Beginning Calculation Date* and *Ending Calculation Date* selected on the *Additional Search Criteria* Screen
- Dates entered in the *First Day to Ignore* (Enter up to 5 *Days to Ignore*) (optional)
- Number of days, 5 or 7, entered in *Work Week*
- Number of days entered in *Adjustment in Days*

NOTE: *Beginning Calculation Date* and *Ending Calculation Date* are used to calculate the turnaround time. For Example, if the *Assigned Date* is the beginning date and the *Signed Date* is the ending date, the turnaround time is calculated based on the number of days between these dates.

NOTE: *Days to Ignore* is used to exclude holidays and other non-working days.

NOTE: The number of days entered in *Adjustment in Days* is added to or subtracted from the calculated turnaround time. If no adjustment is required, enter 0 (zero).

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each order.

- Assigned Date
- Due Date
- Ordered Date
- File Number
- Form Type
- Subject Address
- Days Overdue
- Days Turnaround
- Appraiser Fee

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraisal Turnaround**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.
8. Select the *Beginning Calculation Date* and the *Ending Calculation Date*.
9. Select the number of days in the *Work Week*.
10. Enter the *Adjustment in Days* and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Days Remaining

The *Days Remaining* report displays the days remaining until Due Date for each order.

Report Requirements

- Beginning (From) and ending (To) dates
- Order assigned to an appraiser
- *Due Date* greater than the computer system date

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by appraiser.

The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Due Date
- Assigned Date
- Borrower Name
- Client
- Ordered Date
- Subject Address
- Form Type
- File Number
- Days Left

Instructions

1. Click **Reports > Order Reports – Appraiser > Days Remaining**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraiser List

The *Appraiser List* report is a detailed listing of appraisers in the database.

Report Requirements

- No date selection required

Report Output

The report prints in landscape layout on legal-size paper. The report lists the appraisers in the database.

Appraisers are sorted by

First: Appraiser Code

Report Data

The following information is listed for each appraiser.

- Appraiser Code
- Appraiser Name
- Appraiser Address
- Appraiser Fee/Percentage
- Supervisor Fee/Percentage
- State Certification Number
- Certification State
- State License Number
- License State

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraiser List**.
2. Select all, one, or multiple appraisers.
3. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
4. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Invoiced Reports by Appraiser

The *Invoiced Reports by Appraiser* report lists the individual orders and the total amount billed per appraiser during the specified time period.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to an appraiser
- *Invoiced Date* entered in the order

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all invoiced client fees. (Invoiced fees with 0 (zero) Amount Due are included.) The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each appraiser.

- File Number
- Borrower Name
- Subject Address
- Client Code
- Form Type
- Invoiced Date
- Amount Billed

Instructions

1. Click **Reports > Order Reports – Appraiser > Invoiced Reports by Appraiser**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Invoiced Reports by Appraiser 2

The *Invoiced Reports by Appraiser 2* report lists the individual orders and the total amount billed per appraiser during the specified time period. Report includes order turnaround time and appraiser fees.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to an appraiser
- *Invoiced Date* entered in the order
- *Beginning Calculation Date* and *Ending Calculation Date* selected on the *Additional Search Criteria* Screen
- Dates entered in the *First Day to Ignore* (Enter up to 5 *Days to Ignore*) (optional)
- Number of days, 5 or 7, entered in *Work Week*
- Number of days entered in *Adjustment in Days*

NOTE: *Beginning Calculation Date* and *Ending Calculation Date* are used to calculate the turn around time. For Example, if the *Assigned Date* is the beginning date and the *Signed Date* is the ending date, the turn around time is calculated based on the number of days between these dates.

NOTE: *Days to Ignore* is used to exclude holidays and other non-working days.

NOTE: The number of days entered in *Adjustment in Days* is added to or subtracted from the calculated turnaround time. If no adjustment is required, enter 0 (zero).

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all invoiced client fees. (Invoiced fees with 0 (zero) Amount Due are included.) The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each appraiser.

- File Number
- Client Name
- Case Number
- Subject Address
- Borrower Name
- Ordered Date
- Inspected Date
- TAT (turnaround time)
- Appraiser Paid Date
- Appraiser Fee

Instructions

1. Click **Reports > Order Reports – Appraiser > Invoiced Reports by Appraiser 2.**
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.
8. Select the *Beginning Calculation Date* and the *Ending Calculation Date*.
9. Select the number of days in the *Work Week*.
10. Enter the *Adjustment in Days* and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraiser Fee Splits

The *Appraiser Fee Splits* report lists the amount paid to each appraiser per order.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order includes *Fee Splits*
- Order assigned to an appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: Client

Report Data

The following information is listed for each appraiser.

- File Number
- Designation
- Amount
- Date Paid

Instructions

1. Click **Reports > Order Reports – Appraiser > Appraiser Fee Splits**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Order Reports – Client

Reports in the *Order Reports – Client* category highlights client criteria: accounts receivable, client activity, account status, etc.

Accounts Receivable

The *Accounts Receivable* report lists the total amount due per client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order includes a *Bill to Client*
- Amount Due greater than zero

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Invoiced Date

Third: File Number

Report Data

The following information is listed for each client.

- Invoiced Date
- File Number
- Borrower Name
- Form Type
- Subject Address
- Fees
- Paid
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Accounts Receivable**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Aged Accounts Receivable

The *Aged Accounts Receivable* report lists all overdue accounts by the number of days since Invoiced Date.

Report Requirements

- No date selection required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report lists all overdue accounts by the number of days since the *Invoiced Date*.

The report is divided into sections by number of days since *Invoiced Date*: 0-29 Days Overdue, 30–59 Days Overdue, 60-89 Days Overdue, 90-119 Days Overdue, and 120+ Days Overdue.

Orders are sorted by

First: Days Overdue Range

Second: File Number

Report Data

The following information is listed.

- Borrower Name
- Invoiced Date
- Client Name
- Borrower Name
- Invoice Number
- Subject Address
- File Number
- Loan Number
- Form Type
- Job Type
- Days Over
- Fees
- Amount Paid
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Aged Accounts Receivable**.
2. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
3. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Aged Accounts Receivable by Client

The *Aged Accounts Receivable by Client* report lists all overdue accounts by client divided into sections by the number of days since *Invoiced Date*.

Report Requirements

- No date selection required
- *Invoiced Date* entered in the order
- Order includes a *Bill to Client*
- *Amount Due* greater than zero

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report lists all overdue accounts by client.

The report is divided into sections by number of days since *Invoiced Date*: 0-29 Days Overdue, 30–59 Days Overdue, 60-89 Days Overdue, 90-119 Days Overdue, and 120+ Days Overdue.

The report calculates the days overdue based on the current system date minus the *Invoiced Date*.

Orders are sorted by

First: Days Overdue Range

Second: File Number

Third: File Number

Report Data

The following information is listed by client.

- Invoiced Date
- Client Name
- Borrower Name
- Invoice Number
- Subject Address
- File Number
- Loan Number
- Form Type

- Job Type
- Days Over
- Fees
- Amount Paid
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Aged Accounts Receivable by Client**.
2. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
3. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraisal Volume

The *Appraisal Volume* report is a summary report listing the number of orders and the total fees per client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Report Data

The following information is listed by client.

- Total Orders for Client
- Total Fees for Client

Instructions

1. Click **Reports > Order Reports – Client > Appraisal Volume**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Cash Receipts

The *Cash Receipts* report lists Total Receipts, Average Days to Pay, and Average Fee by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order includes a *Fee* or *Misc. Fee*
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by client.

The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Invoiced Date

Third: File Number

Report Data

The following information is listed by client.

- Paid Date
- Invoiced Date
- Ordered Date
- File Number
- Form Type
- Subject Address
- Borrower Name
- Fees
- Payments
- Days to Pay
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Cash Receipts**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client Activity

The *Client Activity* report lists order activity and fee breakdown by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by client.

The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed by client.

- File Number
- Form Type
- Borrower Name
- Subject Address
- Ordered Date
- Due Date
- Assigned Date
- Inspected Date
- Signed Date
- Reviewed Date
- Fax/EDI Date
- Invoiced Date
- Paid Date
- User Defined Date
- Client Fees

- Misc. Fees

Instructions

1. Click **Reports > Order Reports – Client > Client Activity**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client Activity History

The *Client Activity History* report lists order activity and event history details by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by client.

The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed by client.

- File Number
- Form Type
- Borrower Name
- Subject Address
- Ordered Date
- Assigned Date
- Inspected Date
- Reviewed Date
- Fax/EDI Date
- Event Date
- Status
- Initials
- Comments
- Revised Due Date

Instructions

1. Click **Reports > Order Reports – Client > Client Activity History**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Incomplete Orders

The *Incomplete Orders* report lists all incomplete orders and total fees outstanding by client.

Report Requirements

- No date selection required
- Order assigned to a client
- *Signed Date* blank
- *Cancelled Date* blank and the *Status* is not *Cancelled*; *Status* may be blank

Report Output

The report prints in landscape layout on legal-size paper and is divided into sections by client.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed by client.

- Ordered Date
- Due Date
- Appraiser Name
- Borrower Name
- Subject Address
- Form Type
- File Number
- Fee
- Days Over

Instructions

1. Click **Reports > Order Reports – Client > Incomplete Orders**.
2. Select all, one, or multiple appraisers and clients.
3. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
4. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
5. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Statement of Account

The *Statement of Account* report is a detailed invoice of the total amount due by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order includes a *Billing Client*
- Amount Due greater than zero

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Invoiced Date

Third: File Number

Report Data

The following information is listed by client.

- Invoice Date
- Form Type
- File Number
- Case Number
- Borrower Name
- Client File Number
- Subject Address
- Fee
- Amount Paid
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Statement of Account**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Statement of Account – Window Envelope

The *Statement of Account - Window Envelope* report is a detailed invoice of the total amount due by client. The report prints in Window Envelope style, a tri-fold format suitable for window envelopes.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order includes a *Billing Client*
- Amount Due greater than zero

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report is divided into sections by client and prints in Window Envelope style. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Invoiced Date

Third: File Number

Report Data

The following information is listed by client.

- Invoice Date
- Form Type
- File Number
- Case Number
- Borrower Name
- Client File Number
- Subject Address
- Fee
- Amount Paid
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Statement of Account – Window Envelope**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Uninvoiced Orders

The *Uninvoiced Orders* report lists the total uninvoiced orders and the amount due by client.

Report Requirements

- No date selection required
- Order assigned to a client
- *Signed Date* contains a date

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed by client.

- Date Signed
- Form Type
- File Number
- Subject Address
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Uninvoiced Orders**.
2. Select all, one, or multiple appraisers and clients.
3. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
4. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
5. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Turnaround Report

The *Appraisal Turnaround* report lists the number of orders and the average turnaround time in days by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client and to an appraiser
- *Beginning Calculation Date* and *Ending Calculation Date* selected on the *Additional Search Criteria* Screen
- Dates entered in the *First Day to Ignore* (Enter up to 5 *Days to Ignore*) (optional)
- Number of days, 5 or 7, entered in *Work Week*
- Number of days entered in *Adjustment in Days*

NOTE: *Beginning Calculation Date* and *Ending Calculation Date* are used to calculate the turnaround time. For Example, if the *Assigned Date* is the beginning date and the *Signed Date* is the ending date, the turnaround time is calculated based on the number of days between these dates.

NOTE: *Days to Ignore* is used to exclude holidays and other non-working days.

NOTE: The number of days entered in *Adjustment in Days* is added to or subtracted from the calculated turnaround time. If no adjustment is required, enter 0 (zero).

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- Fax/EDI Date
- Canceled Date
- Borrower Name
- Subject Address
- Form Type
- File Number
- Days to Complete

Instructions

1. Click **Reports > Order Reports – Client > Turnaround Report**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.
8. Select the *Beginning Calculation Date* and the *Ending Calculation Date*.
9. Select the number of days in the *Work Week*.
10. Enter the *Adjustment in Days* and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client List

The *Client List* report is a listing of clients in the database.

Report Requirements

- No date selection required

Report Output

The report prints in landscape layout on legal-size paper. The report lists the clients in the database.

Clients are sorted by

First: Client Code

Report Data

The following information is listed for each client.

- Client Code
- Client Name
- Client Address
- Default Contact
- Miscellaneous Instruction
- Phone Number
- Other Phone
- Fax Number

Instructions

1. Click **Reports > Order Reports – Client > Client List**.
2. Select all, one, or multiple clients.
3. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
4. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Order Status Report

The *Order Status Report* lists incomplete orders and total fees outstanding by client.

Report Requirements

- No date selection required
- Order assigned to a client
- *Signed Date* blank
- Order includes a *Fee* or *Misc. Fee*

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- Status
- Ordered Date
- Due Date
- Appraiser Name
- Borrower Name
- Subject Address
- Form Type
- File Number
- Fees
- Days Over

Instructions

1. Click **Reports > Order Reports – Client > Order Status Report**.
2. Select all, one, or multiple appraisers and clients.
3. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
4. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
5. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Detailed Appraisal Orders Received

The *Detailed Appraisal Orders Received* report lists orders received by client and includes the appraiser fee and amount charged for each order.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- File Number
- Form Type
- Subject Address
- Appraiser Name
- Appraiser Fee
- Total Fee

Instructions

1. Click **Reports > Order Reports – Client > Detailed Appraisal Orders Received**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraisal Orders Received

The *Appraisal Orders Received* report is a listing of orders received by client.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- Client
- File Number
- Form Type
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Appraisal Orders Received**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Summary Appraisal Orders Received

The *Summary Appraisal Orders Received* report is a high-level summary of the number of orders received by form type.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Form Type

Second: Amount Due

Third: State

Report Data

The following information is listed for each order.

- Form Type
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Summary Appraisal Orders Received**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client Statement

The *Client Statement* Report lists the total amount due by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client
- *Amount Due* greater than zero

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Invoice Date

Third: File Number

Report Data

The following information is listed for each order.

- File Number
- Appraiser Name
- Case Number
- Subject Address
- Borrower Name
- Location
- Map Reference
- Days Past Due
- Amount Due

Instructions

1. Click **Reports > Order Reports – Client > Client Statement**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Invoiced Reports by Client

The *Invoiced Reports by Client* report lists the individual orders and the total amount billed by client during the specified time period.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to an appraiser and a client
- *Invoiced Date* entered in the order
- *Beginning Calculation Date* and *Ending Calculation Date* selected on the *Additional Search Criteria* Screen
- Dates entered in the *First Day to Ignore* (Enter up to 5 *Days to Ignore*) (optional)
- Number of days, 5 or 7, entered in *Work Week*
- Number of days entered in *Adjustment in Days*

NOTE: *Beginning Calculation Date* and *Ending Calculation Date* are used to calculate the turnaround time. For Example, if the *Assigned Date* is the beginning date and the *Signed Date* is the ending date, the turnaround time is calculated based on the number of days between these dates.

NOTE: *Days to Ignore* is used to exclude holidays and other non-working days.

NOTE: The number of days entered in *Adjustment in Days* is added to or subtracted from the calculated turnaround time. If no adjustment is required, enter 0 (zero).

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by client. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each appraiser.

- File Number
- Appraiser Name
- Case Number
- Subject Address
- Borrower Name
- Date Ordered
- Date Appraised (Signed Date)
- TAT (Turnaround Time)
- Appraiser Paid Date
- Appraiser Fee

Instructions

1. Click **Reports > Order Reports – Client > Invoiced Reports by Client**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.
8. Select the *Beginning Calculation Date* and the *Ending Calculation Date*.
9. Select the number of days in the *Work Week*.
10. Enter the *Adjustment in Days* and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraisal Orders By

Reports in the *Appraisal Orders By* category sort by the specified criteria: address, appraiser, borrower, etc. An *LSI Report* and an *Appraisal Property Report* are also available.

Address

The *Appraisal Orders by Address* report lists orders sorted by subject street address.

Report Requirements

- Beginning (From) and ending (To) dates required
- Street name entered in the order

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Subject Address

Report Data

The following information is listed for each order.

- Ordered Date
- Subject Address
- Appraiser
- Client Name
- Borrower Name
- Form Type
- File Number
- Fees

Instructions

1. Click **Reports > Appraisal Orders by > Address**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraiser

The *Appraisal Orders by Appraiser* report lists the total number of orders by appraiser.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to an appraiser

Report Output

The report prints in portrait layout on letter-size or legal-size paper and is divided into sections by appraiser. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Appraiser Code

Second: File Number

Report Data

The following information is listed for each order.

- Appraiser Name
- Subject Address
- Ordered Date
- Date Signed
- Form Type
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Appraiser**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Borrower

The *Appraisal Orders by Borrower* report lists orders sorted by borrower.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Borrower Name

Second: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Borrower Name
- Subject Address
- Client Name
- Appraiser Name
- Form Type
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Borrower**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Case Number

The *Appraisal Orders by Case Number* report lists client orders sorted by Case Number.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: Case Number

Report Data

The following information is listed for each order.

- Case Number
- Ordered Date
- Due Date
- Borrower Name
- Subject Address
- Appraiser Name
- Status
- File Number
- Form Type

Instructions

1. Click **Reports > Appraisal Orders by > Case Number**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

City

The *Appraisal Orders by City* report is a listing of orders by the Subject property city.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: City

Second: ZIP Code

Third: Form Type

Report Data

The following information is listed for each order.

- City
- Subject Address
- Ordered Date
- Form Type
- Sale Price
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > City**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
5. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
6. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client

The *Appraisal Orders by Client* report lists orders by client.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- Ordered Date
- Due Date
- Order Status
- Borrower Name
- Subject Address
- Appraiser Name
- Form Type
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Client**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Client File Number

The *Appraisal Orders by Client File Number* report lists client orders sorted by File Number.

Report Requirements

- Beginning (From) and ending (To) dates required
- Order assigned to a client

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Report Data

The following information is listed for each order.

- Client File Number
- Ordered Date
- Due Date
- Borrower Name
- Subject Address
- Appraiser Name
- Form Type
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Client File Number**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Form Type

The *Appraisal Orders by Form Type* report lists the number of orders and total fees by appraisal form type.

Report Requirements

- Beginning (From) and ending (To) dates required
- *Form Type* selected in the order

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Form Type

Second: File Number

Report Data

The following information is listed for each order.

- Form Type
- Ordered Date
- Subject Address
- Client Name
- Appraiser Name
- Fees
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Form Type**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Sale Price

The *Appraisal Orders by Sale Price* report lists orders by Sale Price within appraisal Form Type.

Report Requirements

- Beginning (From) and ending (To) dates required
- *Sale Price* entered in the order

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Form Type

Second: Sales Price

Report Data

The following information is listed for each order.

- Sale Price
- Ordered Date
- Subject Address
- Appraiser Name
- Form Type
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > Sale Price**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

User Defined Date

The *Appraisal Orders by User Defined Date* report lists orders sorted by the User Defined Date entered in the order.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in landscape layout on legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: User Defined Date

Second: Ordered Date

Third: File Number

Report Data

The following information is listed for each order.

- User Defined Date
- Ordered Date
- Subject Address
- Borrower Name
- Client Name
- Appraiser Name
- File Number

Instructions

1. Click **Reports > Appraisal Orders by > User Defined Date**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

LSI Report

The *LSI Report* is an Appraiser Billing Statement of orders completed for Lender Services, Inc.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: LSI Order Number

Report Data

The following information is listed for each order.

- Date of Service (Inspection Date)
- LSI Order number
- Borrower Name
- Total Fee

Instructions

1. Click **Reports > Appraisal Orders by > LSI Report**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Appraisal Property Report

The *Appraisal Property Report* is a list of appraised properties.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: File Number

Report Data

The following information is listed for each order.

- File Number
- Appraiser Name
- Client Name
- Case Number
- Subject Address
- Borrower Name
- Location
- Census Tract
- Map Reference
- Sale Price
- Appraised Value
- Ordered Date
- Appraised Date (Inspection Date)

Instructions

1. Click **Reports > Appraisal Orders by > Appraisal Property Report**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Total Fees

The *Appraisal Order by Total Fees* report provides a detailed list of fees charged per order.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: File Number

Report Data

The following information is listed for each order.

- Designation
- Name
- Amount of Fee

Instructions

1. Click **Reports > Appraisal Orders by > Total Fees**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See *Printing Management Reports* or *Exporting Management Reports* for printing or exporting instructions.

Fee Splits

The *Appraisal Orders by Fee Splits* report lists total fees outstanding including employee fee split detail.

Report Requirements

- Beginning (From) and ending (To) dates required

Report Output

The report prints in portrait layout on letter-size or legal-size paper. The report includes all orders for the specified date type that fall within the requested date range.

Orders are sorted by

First: Client

Second: File Number

Third: Appraiser Code

Report Data

The following information is listed for each order.

- Designation
- Name
- Amount of Fee

Instructions

1. Click **Reports > Appraisal Orders by > Fee Splits**.
2. Select the date type.
3. Enter the *From* and *To* dates.
4. Select all, one, or multiple appraisers and clients.
5. Select additional criteria in *Other 1* and *Other 2* to filter report output (optional).
6. Select *Separate Pages for each Client/ Appraiser* to insert a page break between clients or appraisers (optional).
7. Select the report destination, *Screen* or *Printer*, and click **OK**.

NOTE: See Printing Management Reports or Exporting Management Reports for printing or exporting instructions.