



# Track Management Reports

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## Management Reports

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The Reports feature in Track generates and prints over forty specific tracking reports. 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

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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


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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

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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

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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

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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

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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

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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.