

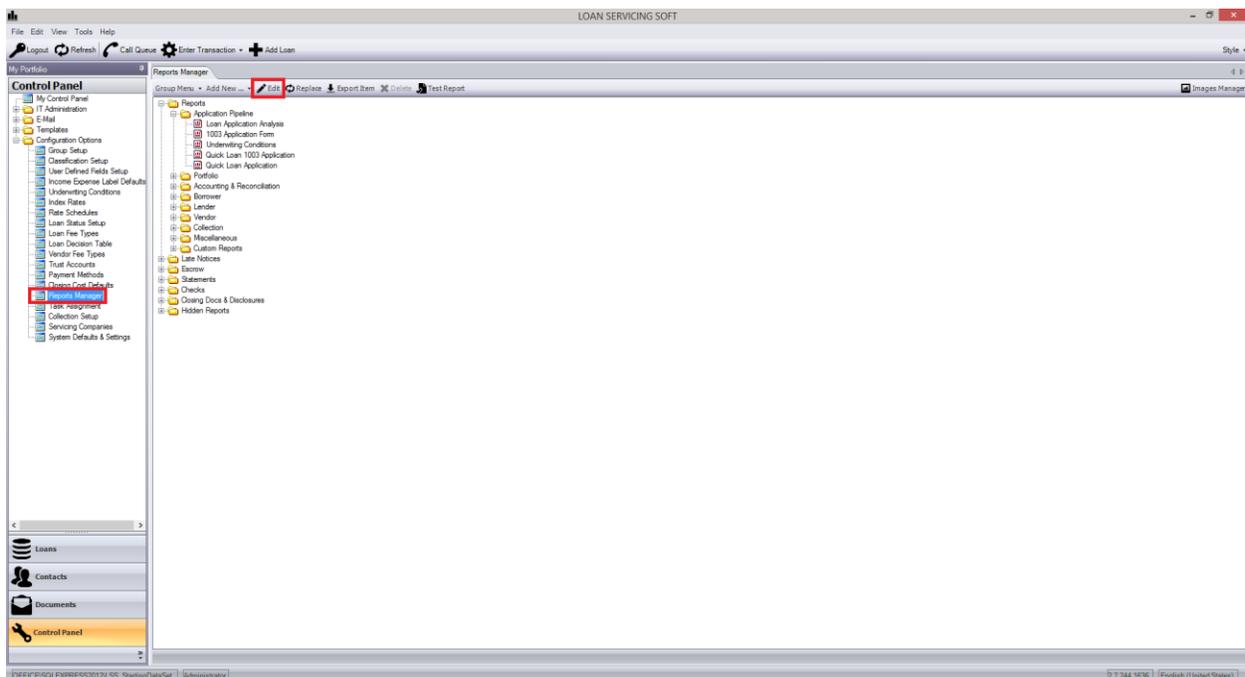
LOAN SERVICING SOFT Using Reports

This document will guide you through the process of setting up and using reports in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

Reports Manager

All reports and documents in LOAN SERVICING SOFT are configured in the Reports Manager section of the control panel. **Control Panel -> Configuration Options -> Reports Manager**. Select a report and click the **Edit** button to make changes to the reports settings.



From the Edit Report window you can make the following changes:

Name – You have the option to customize the display name of the report.

Skip on Update – Check this box if you have customized your report and don't want it to be overwritten when an update is made.

Add to Favorites – Check this box if you use this document on a regular basis and want it to appear in the favorites menu of the Documents section. This will give you quick access to the report.

Is Public – Check this box if you want this document to be available to everyone

Visible Only To – Uncheck the **Is Public** box and use the drop down key to select the group or user you would like to be able view this document.

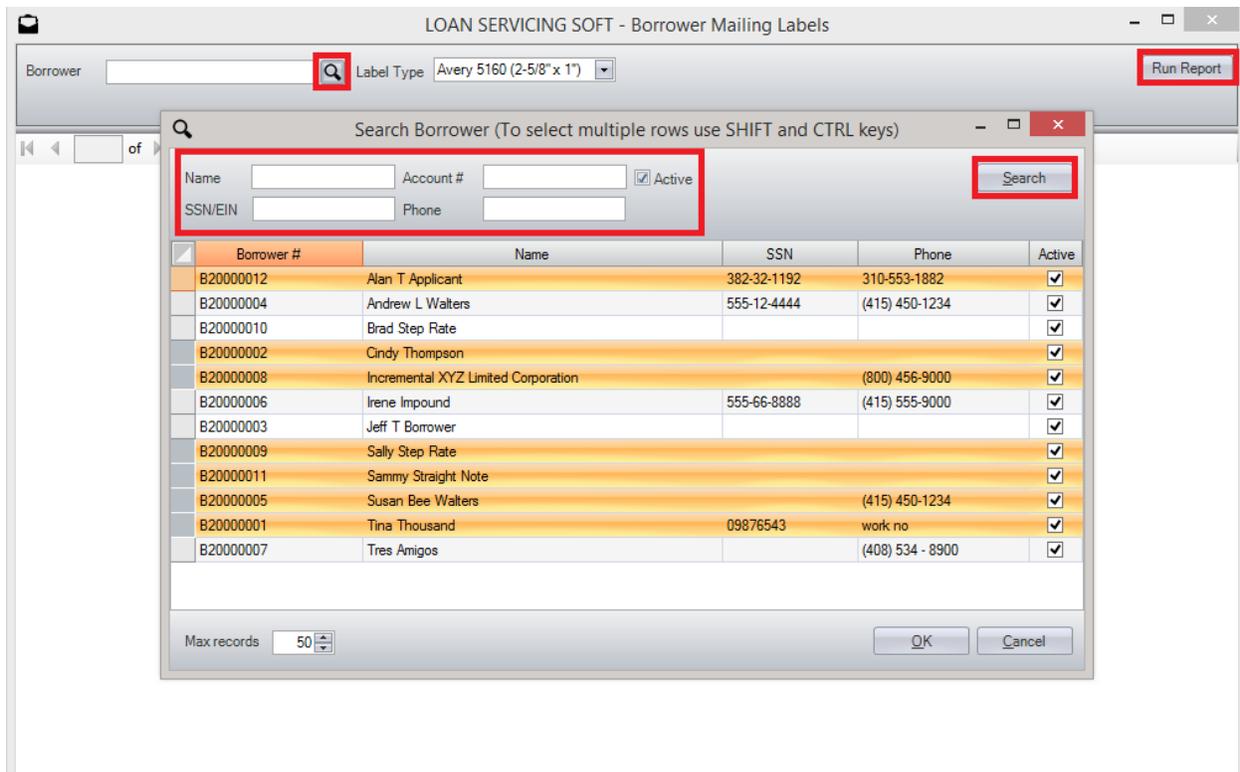
Group – An internal setting.

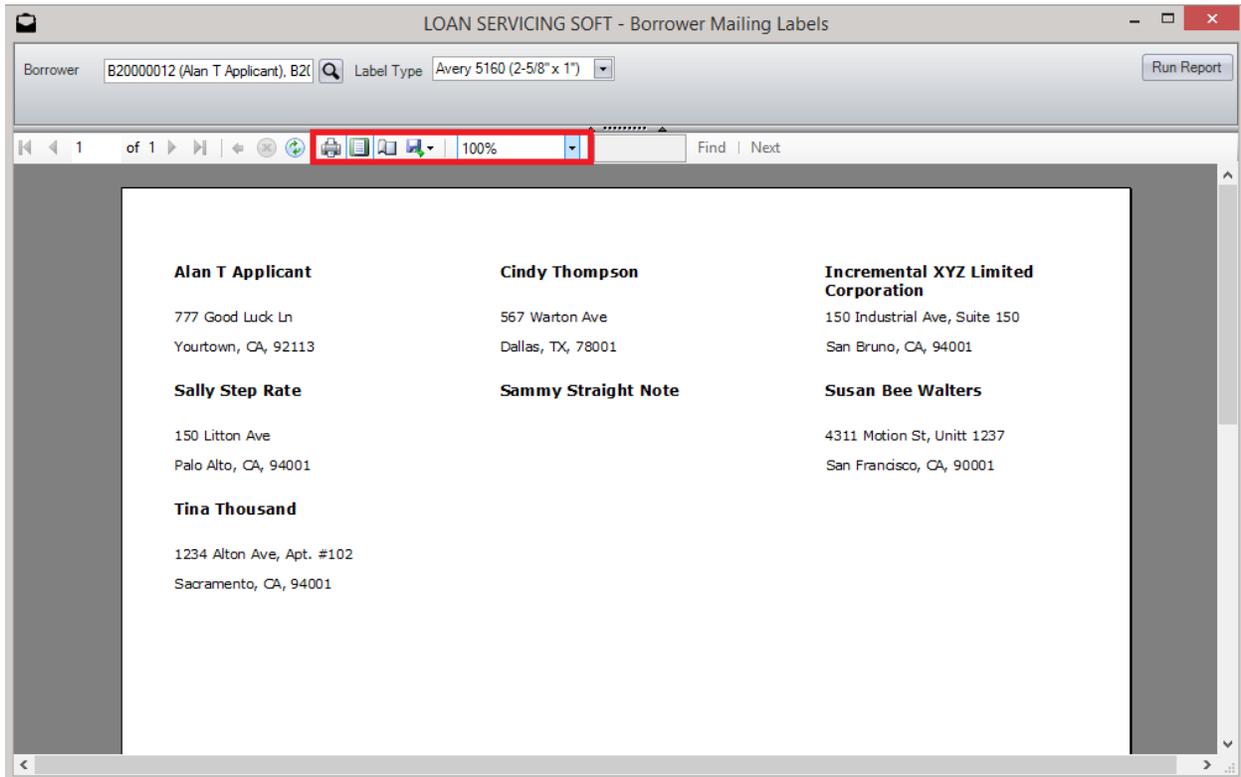
Running Reports

Reports and other documents are found in the **Documents** section of the software. Reports that have been marked as favorites will appear in the Favorites subsection.

To run a report:

- Double click a report in any folder.
- For reports requiring a selection, click the magnifying glass and select an account.
- You can filter your search results by filling in the appropriate fields and clicking the **Search** button.
- Some reports allow multiple selections. Use the **shift** and **ctrl** keys to make your selection.
- Configure other report options to filter your data (in this example: Label Type).
- Click the **Run Report** button.





Once you have run the report, you can use the drop down menu to change the way the preview is displayed. You can also choose to print or export the document.