



RAPID User Guide for Customers
Reports Section

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1. Reports

SEARCH DATA UPLOAD DOCUMENTS REPORTS EXPRESS ORDER

ADMINISTRATION LOGOUT

Order Products

Buyer/Borrower: Transaction#: [New]
Seller/Owner:
Property:
Loan #:

Transaction Type:

Available Products

Appraisal Automated Valuations Business Credit Closing
Consumer Credit Document Services Flood Title

Ordered Products

[None]

CANCEL

Reports can be accessed from the [Service Search page](#) by clicking the [Reports button](#) on the navigation bar at the top of the page. In order for the [Reports button](#) to show, it must be turned 'on' within the Administration module. (Please refer to the Administration User Guide)

1.1 Reports Page



Clicking the [Reports button](#) takes the user to the [Reports page](#) where the user is offered to build the following reports:

- Orders by Provider - Summary
- Open Orders
- Canceled Orders
- Order Detail by State/County
- Order Summary by State/County
- Provider Summary with Turn Time
- Order Detail with Turn Time
- Provider Summary with Turn Time and Confirmation Time

1.1.1 Orders By Provider Summary Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Orders By Provider Summary
Build your report

User Name:

Party: * zc003 Test Mortgage Company

Select Filter Based On Provider Provider: <- Providers ->

Select filter on service type Service Type: <- Service Type ->
Appraisal
Automated Valuations
Business Credit
Closing

Select date ordered Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Orders By Providers - Summary Report*:

- *User Name*: the user enters a *User Name* if they would like the report to be filtered by a specific *User Name*.
- *Party*: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- *Provider*: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.
- *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- *Date Ordered*: the user enters the date range that they would like the report to be run for.
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- ❑ *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- ❑ *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.2 Open Orders Report

The screenshot shows a web application interface for generating an Open Orders Report. At the top, there is a navigation bar with buttons for SEARCH, DATA UPLOAD, ORDER PRODUCTS, DOCUMENTS, and ADMINISTRATION. Below this is a LOGOUT button. The main heading is "Customer Report- Open Orders" with the sub-heading "Build your report". The form contains several input fields and dropdown menus: "User Name:" (text input), "Party:" (dropdown menu showing "* zc003 Test Mortgage Company"), "Provider:" (dropdown menu showing "<- Providers ->"), "Service Type:" (dropdown menu showing "<- Service Type ->" with a list of options: Appraisal, Automated Valuations, Business Credit, and Closing), and "Days Open Greater Than or Equal To:" (text input). There are also two buttons at the bottom: "VIEW REPORT" and "BACK".

The user is prompted to enter the following criteria to run the *Open Orders Report*:

- ❑ *User Name*: the user enters a *User Name* if they would like the report to be filtered by a specific *User Name*.
- ❑ *Party*: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- ❑ *Provider*: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.
- ❑ *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- ❑ *Days Open Greater Than or Equal to*: the user enters the minimum number of days the orders to be displayed on the report have been open.

Please note the buttons located at the bottom of the page:

- ❑ *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- ❑ *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.3 Canceled Orders Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Canceled Orders

Build your report

User Name:

Party: *zc003 Test Mortgage Company ▼

Select Filter Based On Provider Provider: <- Providers -> ▼

Select filter on service type Service Type: <- Service Type -> ▲
Appraisal
Automated Valuations
Business Credit
Closing ▼

Select date ordered Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Canceled Orders Report*:

- *User Name*: the user enters a *User Name* if they would like the report to be filtered by a specific *User Name*.
- *Party*: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- *Provider*: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.
- *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- *Date Ordered*: the user enters the date range that they would like the report to be run for.
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- ❑ *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- ❑ *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.4 Order Detail by State/County Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Order Detail by State/County
Build your report

Select service status <- Service Status ->

User Name:

Party: * zc003 Test Mortgage Company

Select Filter Based On Provider Provider: <- Providers ->

Select filter on service type Service Type: <- Service Type ->

- Appraisal
- Automated Valuations
- Business Credit
- Closing

Select State And County State: <- ALL ->

Select date ordered Beginning Date: 5/1/2001 (mm/dd/yyyy)

Ending Date: 5/7/2001 (mm/dd/yyyy)

(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Order Detail by State/County Report*:

- *Service Status*: the user selects one of the following *Service Statuses* from the drop down menu that they would like the report to be filtered by.
 - *New*: orders that are new and not confirmed.
 - *In Progress*: orders that are currently in progress (includes orders that are on hold or delayed).
 - *Cancelled*: orders that have been cancelled by the Service Provider or the Customer.
 - *Complete*: orders that have been completed.
 - *Delayed*: orders that have been delayed.
 - *On Hold*: orders that have been put on hold by the Service Provider or the Customer.
- *User Name*: the user enters a *User Name* if they would like the report to be filtered by a specific *User Name*.
- *Party*: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- *Provider*: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.

- *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- *State*: the user selects a *State* from the drop down menu that they would like the report to be filtered by.
- *County*: the user selects a *County* from the drop down menu that they would like the report to be filtered by. The *County* drop down menu appears once the state has been selected and includes only the counties that are located in that specific state.
- *Date Ordered*: the user enters the date range that they would like the report to be run for:
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.5 Order Summary by State/County Report

Customer Report- Order Summary by State/County
Build your report

Select service status: <- Service Status ->

User Name:

Party: * zc003 Test Mortgage Company

Select Filter Based On Provider: <- Providers ->

Select filter on service type: <- Service Type ->

Appraisal
Automated Valuations
Business Credit
Closing

Select State And County: State: <- ALL->

Select date ordered: Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Order Summary by State/County Report*:

- **Service Status**: the user selects one of the following *Service Statuses* from the drop down menu that they would like the report to be filtered by.
 - **New**: orders that are new and not confirmed.
 - **In Progress**: orders that are currently in progress (includes orders that are on hold or delayed).
 - **Cancelled**: orders that have been cancelled by the Service Provider or the Customer.
 - **Complete**: orders that have been completed.
 - **Delayed**: orders that have been delayed.
 - **On Hold**: orders that have been put on hold by the Service Provider or the Customer.
- **User Name**: the user enters a *User Name* if they would like the report to be filtered by a specific *User Name*.
- **Party**: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- **Provider**: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.

- *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- *State*: the user selects a *State* from the drop down menu that they would like the report to be filtered by.
- *County*: the user selects a *County* from the drop down menu that they would like the report to be filtered by. The *County* drop down menu appears once the state has been selected and includes only the counties that are located in that specific state.
- *Date Ordered*: the user enters the date range that they would like the report to be run for:
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.6 Provider Summary with Turn Time Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Provider Summary with Turn Time
Build your report

Select Filter Based On Provider Provider: <- Providers ->

Select filter on service type Service Type: <- Service Type ->
Appraisal
Automated Valuations
Business Credit
Closing

Select State And County Party: * zc003 Test Mortgage Company
State: <- ALL ->

Select date ordered Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Provider Summary with Turn Time Report*:

- *Provider*: the user selects a *Provider* name from the drop down menu if they would like the report to be filtered by a specific *Provider*.
- *Service Type*: the user selects one of the following *Service Types* from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- *Party*: the user selects a *Party* name from the drop down menu if they would like the report to be filtered by a specific *Party*.
- *State*: the user selects a *State* from the drop down menu that they would like the report to be filtered by.
- *County*: the user selects a *County* from the drop down menu that they would like the report to be filtered by. The *County* drop down menu appears once the state has been selected and includes only the counties that are located in that specific state.

- *Date Ordered*: the user enters the date range that they would like the report to be run for:
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.7 Order Detail with Turn Time Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Order Detail with Turn Time
Build your report

Select Filter Based On Provider Provider: <-- Providers -->

Select filter on service type Service Type: <-- Service Type -->
Appraisal
Automated Valuations
Business Credit
Closing

Party: * zc003 Test Mortgage Company

Select State And County State: <-- ALL -->

Select date ordered Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Order Detail with Turn Time Report*:

- **Provider**: the user selects a **Provider** name from the drop down menu if they would like the report to be filtered by a specific **Provider**.
- **Service Type**: the user selects one of the following **Service Types** from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- **Party**: the user selects a **Party** name from the drop down menu if they would like the report to be filtered by a specific **Party**.
- **State**: the user selects a **State** from the drop down menu that they would like the report to be filtered by.
- **County**: the user selects a **County** from the drop down menu that they would like the report to be filtered by. The **County** drop down menu appears once the state has been selected and includes only the counties that are located in that specific state.

- *Date Ordered*: the user enters the date range that they would like the report to be run for:
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- *Back button*: if the user wants to move to the previous page, click the *Back button*.

1.1.8 Provider Summary with Turn Time and Confirmation Time Report

SEARCH DATA UPLOAD ORDER PRODUCTS DOCUMENTS ADMINISTRATION

LOGOUT

Customer Report- Provider Summary with Turn Time and Confirmation Time
Build your report

Select Filter Based On Provider Provider: <-- Providers -->

Select filter on service type Service Type: <-- Service Type -->
Appraisal
Automated Valuations
Business Credit
Closing

Select State And County Party: * zc003 Test Mortgage Company

Select date ordered State: <-- ALL -->

Beginning Date: 5/1/2001 (mm/dd/yyyy)
Ending Date: 5/7/2001 (mm/dd/yyyy)
(Date range cannot exceed 90 days.)

VIEW REPORT BACK

The user is prompted to enter the following criteria to run the *Provider Summary with Turn Time and Confirmation Time Report*:

- ❑ **Provider**: the user selects a **Provider** name from the drop down menu if they would like the report to be filtered by a specific **Provider**.
- ❑ **Service Type**: the user selects one of the following **Service Types** from the drop down menu that they would like the report to be filtered by.
 - Appraisal
 - Automated Valuations
 - Business Credit
 - Closing
 - Consumer Credit
 - Document Services
 - Flood
 - Title
- ❑ **Party**: the user selects a **Party** name from the drop down menu if they would like the report to be filtered by a specific **Party**.
- ❑ **State**: the user selects a **State** from the drop down menu that they would like the report to be filtered by.
- ❑ **County**: the user selects a **County** from the drop down menu that they would like the report to be filtered by. The **County** drop down menu appears once the state has been selected and includes only the counties that are located in that specific state.

- *Date Ordered*: the user enters the date range that they would like the report to be run for:
 - Beginning Date
 - Ending Date

Please note the buttons located at the bottom of the page:

- *View Report*: after completing all required fields, click the *View Report button* and the report will be displayed.
- *Back button*: if the user wants to move to the previous page, click the *Back button*.