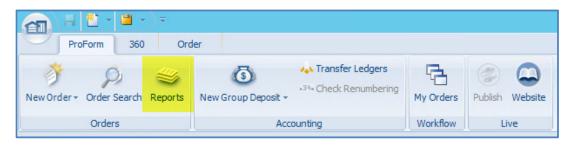


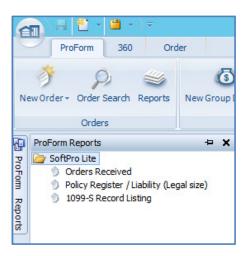
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Generating Reports

From the ProForm ribbon select the Reports icon.



A list of available reports will populate on the left side of the screen.



The Report list will auto-hide when you click elsewhere in application. When it does so, you can open the report list by floating the mouse over the **ProForm Report** tab to the left of the screen. By selecting the push-pin icon, you can pin the reports list in an open position and prevent the list from auto hiding.

ProForm 360 Order	ProForm 360 Order
Ø W New Order → Order Search Reports New	New Order - Order Search Reports New O
Orders	Orders
Start Page 🗙 Order 15-0003	ProForm Reports
Recently Viewed Items	SoftPro Lite SoftPro Lite Orders Received Policy Register / Liability (Legal size) 1099-S Record Listing



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Select the report needed from the Reports list and double click to start the report. Many reports in Select have customizable parameters. The user has the ability to capture all available data by not limiting the report in any way and just selecting OK.

Policy Register / Liability (Legal size)								
Underwriter name:	I ✓							
Report by:*	Issued Date							
Date from: Date to:	(None) v							
Include endorsements: Include additional title charges:								
Endorsements only: Show endorsements, charges as totals only:								
Show charge type, transaction code summary: Report comments:								
* Required	OK Cancel							

When the report is generated, any limitations on the report will list at the top left of the report heading. In this example, the report was generated by Issue Date. Based on these reporting criteria, a report of 8 pages was produced.

Underwriter Code: Al Underwriter Name: Al Issued Date: Al						(Policy F	Register / Liability By Issued Date
Format Options: Selection by issue Underwriter Agent Number Order Number Insured / Description	Amount of Insurance Policy Number			ssued Date	Total Charges	Underwriter Portion	Agent Portion	Prior Policy Number/Coverage
Chicago Title and Insurance Company No Agency ID 2007080009 Daniel P. Harrington	375.000.00 987777	Residential 1-4	a	8/22/07	1.312.50	262.50	1.050.00	
الاربية المعلى المستحد الجري فتتحارب	at a summer and a sub-	June P	30, 2080.		312.50			and
cuiatri a an affe, Mary K. Affi Capital Bank, its successors and/or assign	55,32,00 1,501,50. 400,000.00 4354535345	Residential 1-4	1 Order: 20101100	.ə/1、 2/15/10 44 Total:	175.00 \$2,450.00	35.00 \$490.00	140.00 \$1,960.00	
	Underw	rriter: Chicago Title and I	insurance Compa	ny Total:	\$8,662.50	\$1,732.50	\$6,930.00	



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The same report can be run with different criteria.

Policy Register / Liability (Legal size)									
Underwriter name:		v							
Underwriter code:		¥							
Report by:*	Issued Date	¥							
Date from:	02/01/2015 🗸								
Date to:	02/28/2015 🗸								
Include endorsements:									
Include additional title charges:									
Endorsements only:									
Show endorsements, charges as totals only:									
Show charge type, transaction code summary:									
Report comments:									
* Required	OK Car	icel							

Based on these reporting criteria, a report of 11 pages was produced.

										Policy I	Register / L	iability
	Underwriter Code: All Underwriter Name: All Sweld Date: "1/12009 through 12/31/2009 Format Options: Salection by issued date, endorsement details included; additional tille charge details included; transaction code summary displayed Comments: 2009 Summary Report.											
		1	Amount of Insurance Policy N	lumber	Property Use	Transaction Code	lssued Date	Total Charges	Underwriter Portion	Agent Portion	Prior Policy Number/Coverage	,
No Age 20090 Bria	060023	id wife, Mary K. Wil	650 000 00 7867867	868	Residential 1-4		05/15/09	2,275.00	455.00 00	1,820.00 25	J	يب جمع
	Code Noc Entered	Underwnt,	455.00 1,820.00	0.00 550.00	i 4	23. 455.00 370.00						
	lotal	Total Charges Underwriter Split Agent Split	2,275.00 455.00 1,820.00	550.00 0.00 550.00		825.00 455.00 370.00						
Fidelity N	Fidelity National Title Insurance Company											
	(I Vege 1 of 11)											

You can view the pages of the reports by utilizing the forward and back button located at the bottom of the report.





Save As

Close

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Select Options X Exit Select

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To print the report, utilize the print function under the Application button, also known as the SoftPro button. You can also find Save As options here. -* TT) 360 Report ProFor ProForm ProTrust Pro 1099 SPImage SPAdmin Save a document to disk. Preview and print a docum New . Save as PDF document. PDF Print Click to print the active docume Click to save the active document in Adobe PDF (.pdf) format. Dpen Open ۶ Save as Word document. W 🕯 **Print Preview** Click to save the active document in Microsoft Word (.doc) format. Save Save 📩 Click to preview the active docu Save as Office XML document. Start Page Start Page W Click to save the active document in Microsoft Office Open XML (.docx) format. Save as Excel document. Click to save the active document in Microsoft Excel (.xls) format. Work Lists Work Lists -Print . Print Send Send , Publish Publish .

🗈 Select Options 🛛 🗙 Exit Select

Save As

Close