

# Using GenX2005 Management Reporting

This feature in GenX2005 allows you to preview and print a variety of reports that display detailed information on all files entered into the GenX program.

## Processors/Originators

Designating file processors, title processors and originators will give you the necessary tools and capabilities to track file activity, both within your business and outside of it.

### Adding/Deleting Processors and Originators

To enable the management reporting feature of the software, you must first add the names of your Processors and Originators to the program. To do this, go the Utilities drop-down menu on the toolbar. Click on the Processor/Originator Name Maintenance button. Here you can add Processors and Originators by typing in a name and clicking the add button in either the Add File/Title Processor box or the Add Originator box. To delete names, select a name from the drop down box and click the delete button.

### Selecting and Changing

You can select or change the Processors and/or Originator for a particular file at any point. After adding a closing or opening an existing one, go to the Information Menu, and click the Attorney/ Processor/ Originator Selection button. To make your initial selection or change any of these, simply click the drop down box and select a name.

### Using Defaults

You might want to use the same processors and/or originator for all, or a majority of, your closings. To do this, go again to the Utilities drop-down menu on the toolbar and click the Company Name Maintenance button. Go to the Management Defaults tab. You will notice that, along with processors and the originator, you can also select your default attorney here. Use the drop down boxes to select your defaults. If you do not want a particular default, clear the box so it is empty. Defaults will be added to all new closings but not to existing closings.

## Reporting

The Management Reporting screen can be accessed from Tools drop-down menu.

### “From” and “To” Dates

When the GenX Management Reporting screen appears, the cursor will be in the “From” date box. The date you enter in this box, as well as in the “To” date box, will determine the time frame that the report is based on. Alternatively, you can use the calendar buttons (located to the right of the date boxes) to enter dates. Click the calendar button, click a date and close the calendar pop up screen. Or simply double click a date and the calendar screen will close automatically.

### Sorting Results (except for summary reports)

For most reports you have the option of sorting the results displayed. At the top, center of the screen, choose File Number, Closing Date or Lender to sort by that selection.

### **Choosing Reports**

You can choose as many reports as you want at one time. However, if a report returns no data based on your filtering criteria, the program will only preview or print the reports up to the one with no data. A message box will tell you which report is empty. You'll can uncheck that report then continue to preview or print without reselecting. If you choose to input the necessary Processor or Originator information into the files, you will have to go back into Management Reporting after you're done and reselect the reports that didn't preview or print.

## **Types of Reports**

### **General Reports**

Preview or print reports that display details on files currently open, opened, scheduled to close, or closed. You can do this for any combination of Processors and/or Originators. You can also use advanced filtering to view or print details on any files that have a file processor, title processor, or originator designated. Or even those that have none designated.

### **File Processor Reports**

Preview or print reports that display activity for selected file processor(s) on opened, currently open, scheduled to close, or closed files.

### **Title Processor Reports**

Preview or print reports that display activity for selected title processor(s) on opened, currently open, scheduled to close, or closed files.

### **Originator Reports**

Preview or print reports that display activity for selected originator(s) on closed files. You can also choose a lender to apply more filtering to your results.

### **Loan Type Reports**

Preview or print reports on refinance, purchase or both loan types. You can also choose a lender to apply more filtering to your results.

### **Summaries**

Preview or print reports that display the activity of all file Processors, Title Processors, or Originators on currently open, closed, postponed, or cancelled files. Also displays the file count of those files where no Processor or Originator is assigned as well as those with deleted Processors and Originators.