

ENCOMPASS – HOW TO USING REPORTING VIEWS IN TPO PORTAL

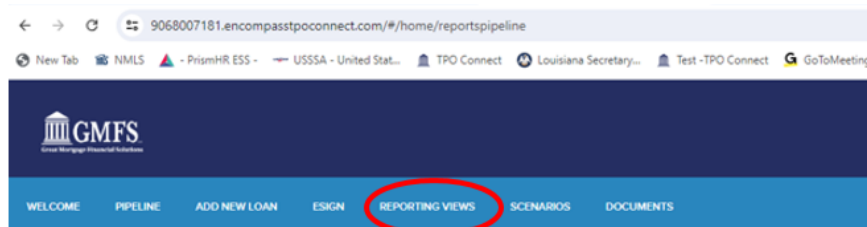
GMFS streamlines pipeline management through its TPO Portal, empowering users with the ability to generate customized pipeline reports tailored to their specific needs. This innovative tool grants all users, regardless of their role or persona, the flexibility to create reports that cater to their unique requirements.

The portal provides a comprehensive suite of report options, including: Funding Loans for the Last 365 Days, New Applications Last 30 Days, Locked Loans Last 30 Days, and Loan Funded List for All Time. These reports offer valuable insights into various aspects of the pipeline, such as loan funding activity, new loan applications, and locked loans.

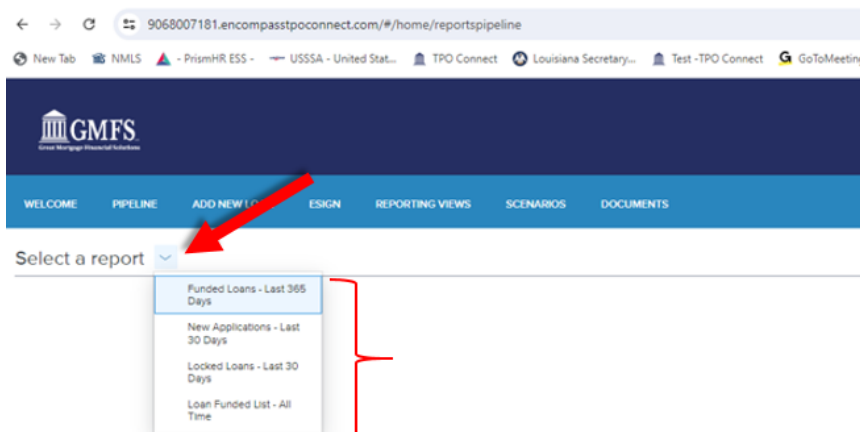
Within the reporting interface, users have the flexibility to filter the data to narrow down the results to specific parameters, ensuring they retrieve only the most relevant information. Additionally, the system allows users to export the reports in CSV or Excel spreadsheet formats, enabling them to easily share and analyze the data offline.

This comprehensive reporting functionality within the TPO Portal empowers GMFS users with the tools they need to stay informed about their pipelines, make data-driven decisions, and optimize their lending processes.

1. From the Encompass **TPO Connect** Welcome page, click **Reporting Views**.



2. On the **reporting** screen, click the Select a **report** drop-down arrow, and then select a **report**.
 - The report data will be displayed.



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3. Sorting the Data:

- Click a column header to display data in ascending order based on the information in the column. The sorting is indicated by a **Down Arrow**.
- Alternately click the header to sort the data in the descending or ascending order. The sorting is indicated by an **Up Arrow**.

New Applications - Last 30 Days | 7 Items

Organization Name
De # All TPO Customer - PROD

APPLICATION DATE	EST CLOSING DATE	BORROWER NAME	LOAN #	SUBJECT PROPERTY ADDRESS	SUBJECT PROPERTY CITY	SUBJECT PROPERTY STATE	SUBJECT PROPERTY ZIP	LOAN PURPOSE	LOAN TYPE	HMDA LOAN AMOUNT	LOAN INFO CHANNEL
06/24/2024		America, Andy	24063417	1234 Ocean Pines #23	Prairieville	LA	70769	Purchase	Conventional	336,000.00	Banked -
06/24/2024		America, Andy	24063413	1234 Ocean Pines #23	Prairieville	LA	70769	Purchase	Conventional	336,000.00	Corresp

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06/24/2024		America, Andy	24063413	1234 Ocean Pines #23	Prairieville	LA	70769	Purchase	Conventional	336,000.00	Corresp

4. Apply Search Filters:

- Click the **Search** icon (magnifying glass) in a column header to search for specific data within the column. Enter a value in the blank field or select a filter from the list of options.
- You can filter items by date in the grid by placing your cursor over a date column header, clicking on the **Calendar** icon, selecting or entering a date or date range, and then clicking **Enter** on your keyboard.
- You can temporarily re-arrange the columns if needed. Hover over the column, click the eight dots to select the column, and drag the column where desired.

New Applications - Last 30 Days | 2 Items

Organization Name
De # All TPO Customer - PROD

Application Date: 06/24/2024

APPLICATION DATE	EST CLOSING DATE	BORROWER NAME	LOAN #	SUBJECT PROPERTY ADDRESS	SUBJECT PROPERTY CITY	SUBJECT PROPERTY STATE	SUBJECT PROPERTY ZIP	LOAN PURPOSE	LOAN TYPE
06/24/2024		America, Andy	24063417	1234 Ocean Pines #23	Prairieville	LA	70769	Purchase	Conventional
06/24/2024		America, Andy	24063413	1234 Ocean Pines #23	Prairieville	LA	70769	Purchase	Conventional

5. Printing, exporting or saving report:

- To **download** the report to your computer in an Excel file (CSV), click the **Export csv** button.
- To print the report, click on the **Print** button.
 - Here you can preview the report, print the report, or save the report as a PDF File.

New Applications - Last 30 Days | 7 Items

Organization Name
De # All TPO Customer - PROD

APPLICATION DATE	EST CLOSING DATE	BORROWER NAME	LOAN #	SUBJECT PROPERTY ADDRESS	SUBJECT PROPERTY CITY	SUBJECT PROPERTY STATE	SUBJECT PROPERTY ZIP	LOAN PURPOSE	LOAN TYPE	HMDA LOAN AMOUNT	LOAN INFO CHANNEL
05/30/2024		America, Andy	24052237	1234 Ocean Pines #23	Prairieville	LA	70769	NoCash-Out Refinance	FHA	341,800.00	Banked - Wholesale