

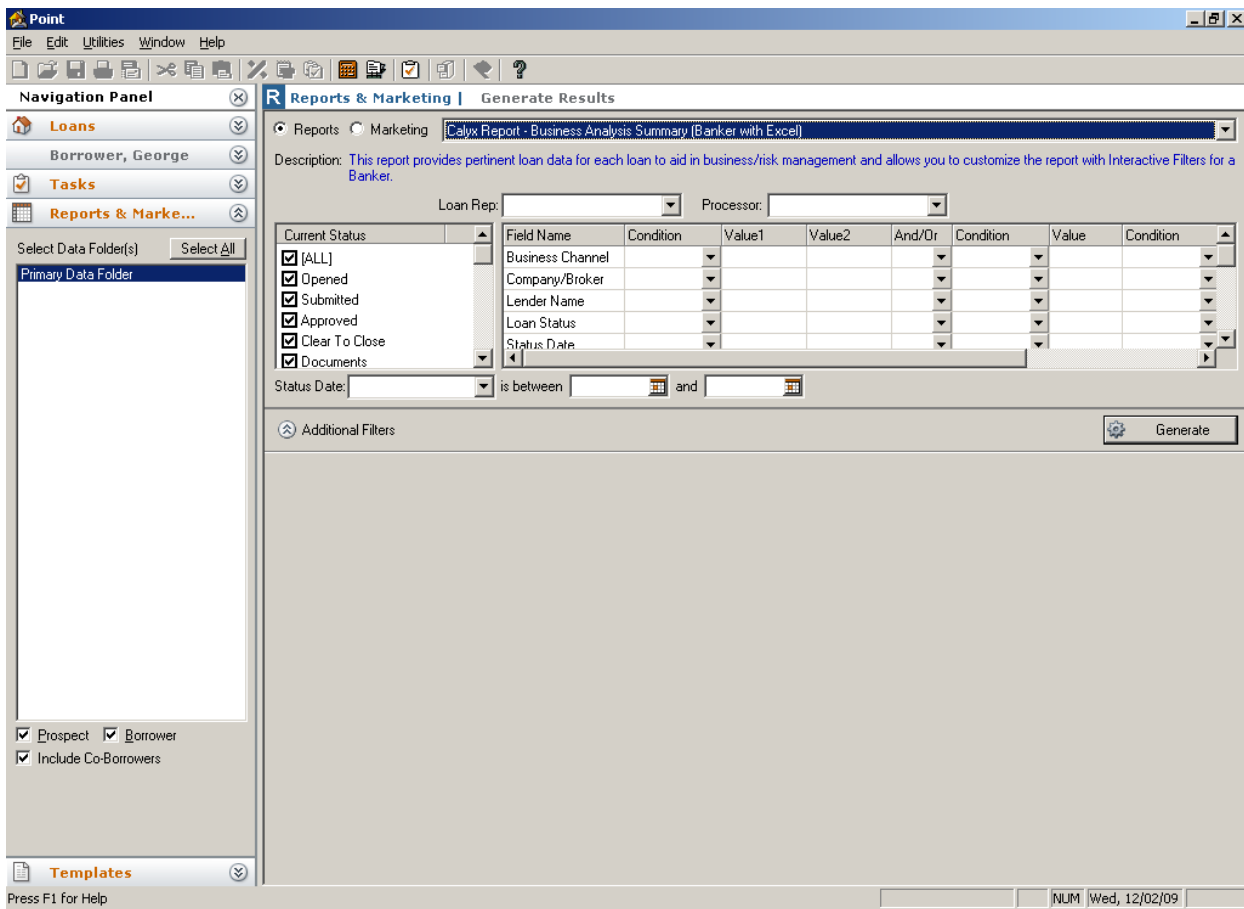
When you want to view the entire snapshot of your company from every angle, look no further than the Reports in Point®. Point contains an assortment of standard pre-defined report templates that are geared toward simplifying your business needs and increasing your bottom line. You can also create custom templates that meet your exact specifications. It's easy to create, view, and print data-specific reports tracking all files – all within Point!

### Generating Reports in Point

The first step in creating a Report is to set up a Report & Marketing Template. To view, create, and modify templates, use the Templates tab on the navigation panel. Please refer to the tip sheet titled; “Creating Reports & Marketing Templates” to create custom Reports tailored to your company.

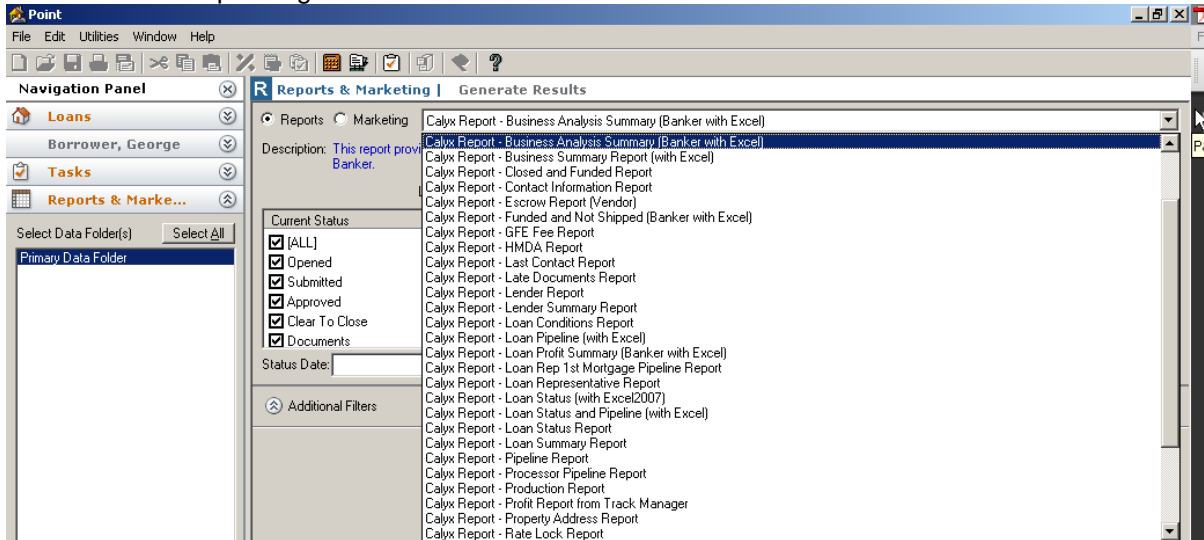
First, click the Reports & Marketing tab in the navigation panel to open the Reports & Marketing Generate Results screen.

Select the data folders where you will collect your report data. If you want to include data from all data folders, click the Select All button. Select the types of files that you want to include in the report by using any combination of the Prospect, Borrower, and Include Co-Borrowers check boxes.



Reports & Marketing: Left Navigation Bar

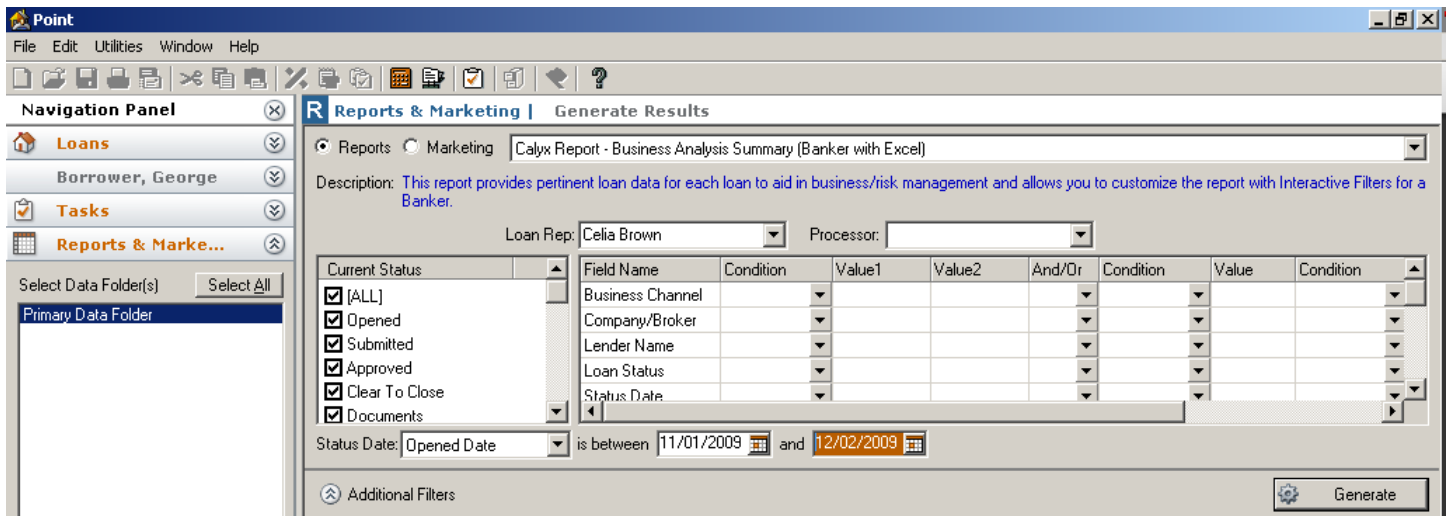
In the workspace, select the Report radio button to specify the type of template, and select a template from the dropdown list. The reports that contain “Excel” in the title are generated in a Microsoft Excel spreadsheet. These reports will display in the lower portion of the Generate results screen, but can be opened up fully in Excel by clicking the “Open in Excel” button once the report is generated.



Reports & Marketing: Template Download List

Use the Additional Filters button to specify more options to customize the report.

Use the Loan Rep and Loan Processor dropdown lists to filter the search results by a specific loan representative or loan processor. In the Current Status section, select the status of the loan to include in the report, or Select All to include loans of any status. To filter loans based on specific status dates, (for example all loans opened between 1/1/2008 and 2/1/2008), select the loan status from the Status dropdown list, specify a date range in the date fields, and click Generate.



Reports & Marketing Generation Screen

**Reporting Output**

Depending on the template settings, reports are output into the Point Report Viewer window, a separate Excel spreadsheet, or an Excel spreadsheet, which is displayed in the lower section of the Generate Results screen. After a report is generated you can manipulate the data depending on the output type you selected.

**If you have created or selected a report with an Excel output, you may click the “Keep the report results open” box and this report will self-generate each time you select the “Reports & Marketing” tab.**

The screenshot shows the 'Point' software interface. The main window is titled 'Generate Results' and is currently displaying the 'Reports & Marketing' tab. The report selected is 'Calyx Report - Business Analysis Summary (Banker with Excel)'. The description states: 'This report provides pertinent loan data for each loan to aid in business/risk management and allows you to customize the report with Interactive Filters for a Banker.' The report is configured with the following filters:

- Loan Rep: [Dropdown]
- Processor: [Dropdown]
- Current Status: [Dropdown]
- Field Name: Business Channel, Company/Broker, Lender Name, Loan Status, Status Date
- Condition: [Dropdown]
- Value1: [Dropdown]
- Value2: [Dropdown]
- And/Or: [Dropdown]
- Condition: [Dropdown]
- Value: [Dropdown]
- Condition: [Dropdown]

The report is filtered by 'Status Date' is between 11/01/2009 and 12/02/2009. The 'Additional Filters' section shows the 'Keep the report results open' checkbox checked. The 'Open Loan' and 'Refresh' buttons are visible. The 'Sort' dropdown is set to 'Data'. The 'Views' section shows 'Data', 'Dashboard', and 'Analysis' tabs. The 'E-Mail To...', 'Print', and 'Open in Excel' buttons are also present. The data table is displayed with the following columns: Data Folder Name, Filename, Lender Loan #, Last Name, and Business Channel. The data rows are:

1	Data Folder Name	Filename	Lender Loan #	Last Name	Business Channel
2	Primary Data Folder	Borrower, George		Borrower	
3	Primary Data Folder	Homeowner sample	Lender Case #	Homeowner	Brokered
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					

The status bar at the bottom shows 'NUM Wed, 12/02/09'.

Results displayed in Point viewer

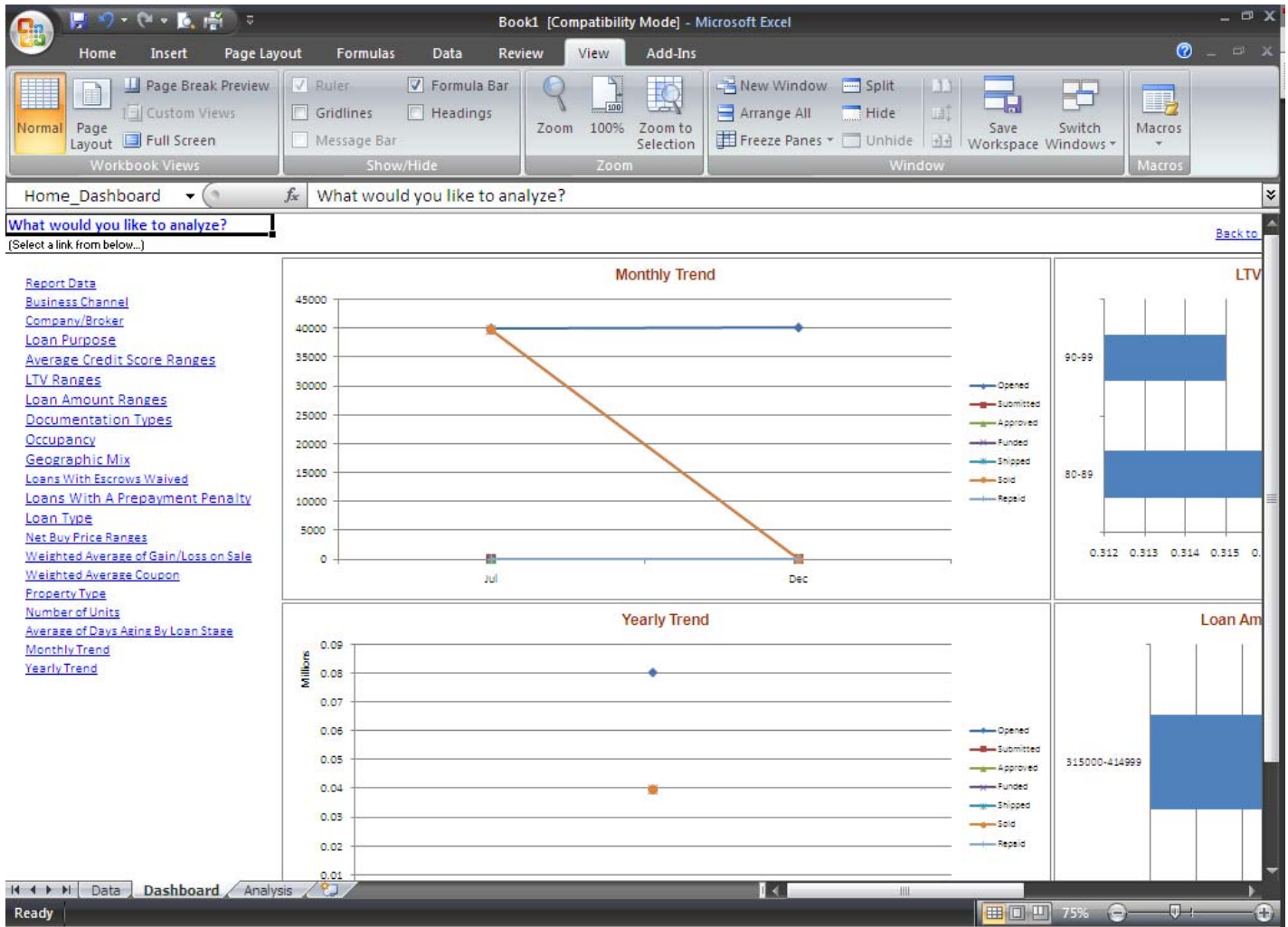
A report that has Excel<sup>®</sup> as an output will open in Excel within Point<sup>®</sup> or in a separate Excel window, depending on the report template.

The screenshot shows the Point software interface. On the left is a navigation panel with sections for Loans, Borrower (George), Tasks, and Reports & Marketing. The main area is titled 'Reports & Marketing | Generate Results' and shows a report configuration for 'Calyx Report - Business Analysis Summary (Banker with Excel)'. The description states: 'This report provides pertinent loan data for each loan to aid in business/risk management and allows you to customize the report with Interactive Filters for a Banker.' Below this are fields for 'Loan Rep:' and 'Processor:'. A table lists various fields with conditions and values:

Current Status	Field Name	Condition	Value1	Value2	And/Or	Condition	Value	Condition
<input checked="" type="checkbox"/> [ALL]	Business Channel							
<input checked="" type="checkbox"/> Opened	Company/Broker							
<input checked="" type="checkbox"/> Submitted	Lender Name							
<input checked="" type="checkbox"/> Approved	Loan Status							
<input checked="" type="checkbox"/> Clear To Close	Status Date							
<input checked="" type="checkbox"/> Documents								

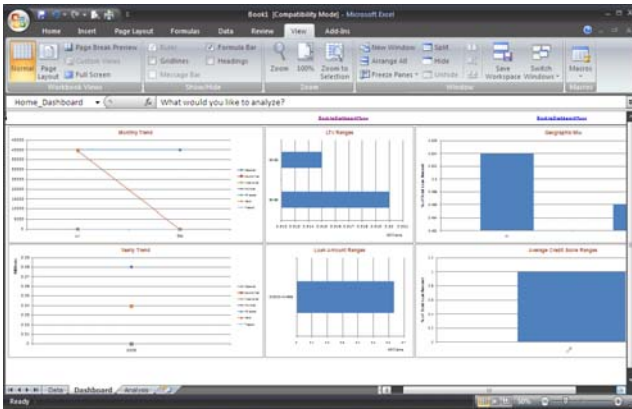
Below the table, there are date pickers for 'Status Date' set to 'is between 11/01/2009 and 12/02/2009'. There are also buttons for 'Open Loan', 'Refresh', 'Sort', 'Views' (Data, Dashboard, Analysis), 'E-Mail To...', 'Print', and 'Open in Excel'. At the bottom, there is a chart area titled 'Chart 5' with a sub-header 'What would you like to analyze?' and a list of links: Report Data, Business Channel, Company/Broker, Loan Purpose, Average Credit Score Ranges, LTV Ranges, Loan Amount Ranges, Documentation Types, Occupancy, Geographic Mix, Loans With Escrows Waived, and Loans With A Prepayment Penalty. To the right of the links is a line chart titled 'Monthly Trend' showing a value of approximately \$40,000 on the y-axis (ranging from \$10,000 to \$45,000) and a horizontal line extending to the right.

Results displayed in Microsoft Excel viewer

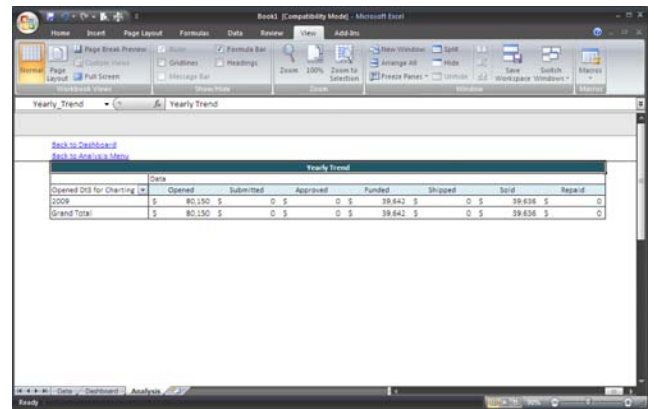


Results displayed in Microsoft Excel

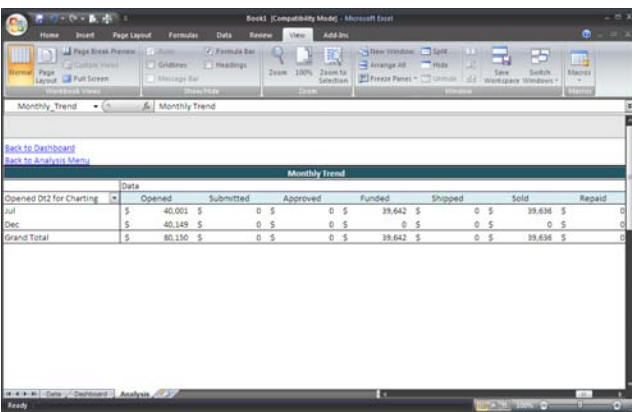
Viewing Options in Full Excel View



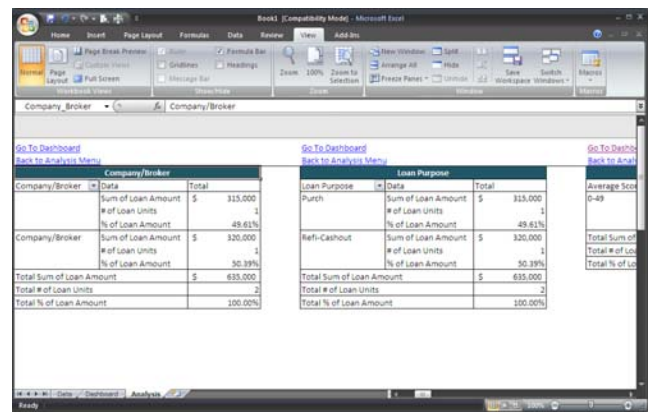
Dashboard View



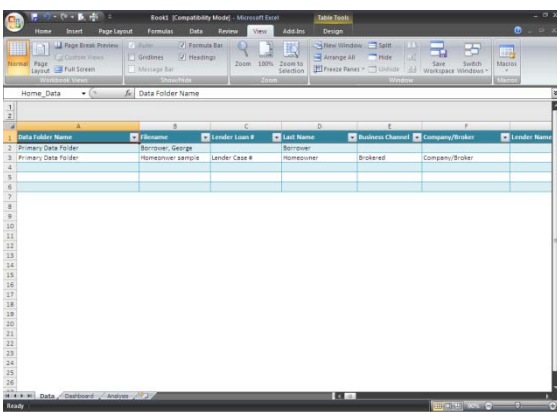
Yearly Trend



Monthly Trend



Range Analysis



Data View