

● REPORT DESCRIPTIONS



EZ Coordinator™ contains a variety of reports for communicating transaction details to clients or affiliates, and for managing transactions within your office. Reports are easy to generate and can be printed, faxed, or e-mailed. Enclosed are a few report samples for your review.

Each report can be saved in the following formats: Adobe PDF, Microsoft Excel, Microsoft RTF (Rich Text Format) and HTML. Each report can be printed from a local or network printer, or faxed using a 3rd-party fax software installed on your computer. Reports can also be e-mailed seamlessly from EZ Coordinator as a PDF attachment (or another available format) via Microsoft Outlook.

EZ Coordinator allows the user to "build" each report using selectable criteria, including the company name that will appear on the report header.

- **Active Pipeline** – Shows all open transactions within a user-defined date range. Displays contract & close dates, subject property, buyer and buyer's agent, seller and seller's agent, coordinator, and sales price. The sales price total for all transactions is calculated and displayed at the bottom of the report.
- **Active Pipeline By Affiliate** – Same description as the Active Pipeline report — allows only transactions of a selected affiliate to show up in the report.
- **Affiliate Address List** – Outputs contact information for all affiliates stored in the database, including: affiliate name and company name; affiliate type; addresses; phone and fax numbers; and e-mail address.
- **Affiliate Address List By Company** – Same description as Affiliate Address List — allows the user to filter by company name so that only records of a selected company are displayed in the results.
- **Affiliate Address List By Type** – Same description as Affiliate Address List. Allows the user to filter by affiliate type so that only records of a selected type (i.e. agent, lender, home inspection, etc.) are displayed in the results.
- **Affiliate Record** – Generates a single page printout of a selected affiliate record with all their contact information and notes.
- **Consolidated Task List** – Outputs a consolidated list of all tasks due for all open transactions — a master "checklist" that shows the transaction I.D.; task description; due date; name, company name, and work phone and fax number of affiliate associated with each task.
- **Consolidated Task List By Affiliate** – Same description as Consolidated Task List. Allows only tasks from a selected affiliate's transaction schedules to appear in the results.
- **Consolidated Task List By Date** – Same description as Consolidated Task List. Allows the user to select a date range for tasks due that will appear in the results.
- **Contact Record** – Generates a single page printout of a selected contact (buyer or seller) record with all their contact information and notes.
- **Schedule Template** – Outputs a selected custom schedule template with all pre-defined schedule settings.
- **Task List** – Outputs all scheduled tasks for a selected transaction. Displays subject property; contract and close dates; task description; due date or completion date; affiliate's (associated with the task) name, company name, work phone, fax and cell phone numbers.