**LOAN SERVICING SOFT Editing Existing Reports**

This document will guide you through the process of editing existing reports in the LOAN SERVICING SOFT system.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.
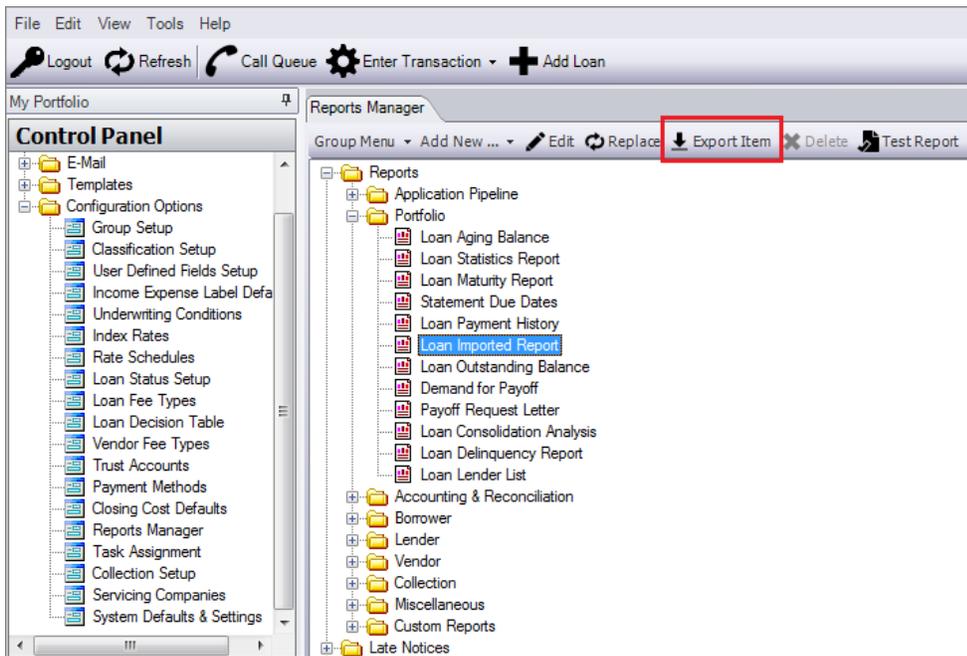
Choose the Report to Edit

To edit an existing report, first choose the report by going to Control Panel → Configuration Options → Reports Manager. Expand the folders in the right panel to find the report you would like to edit.
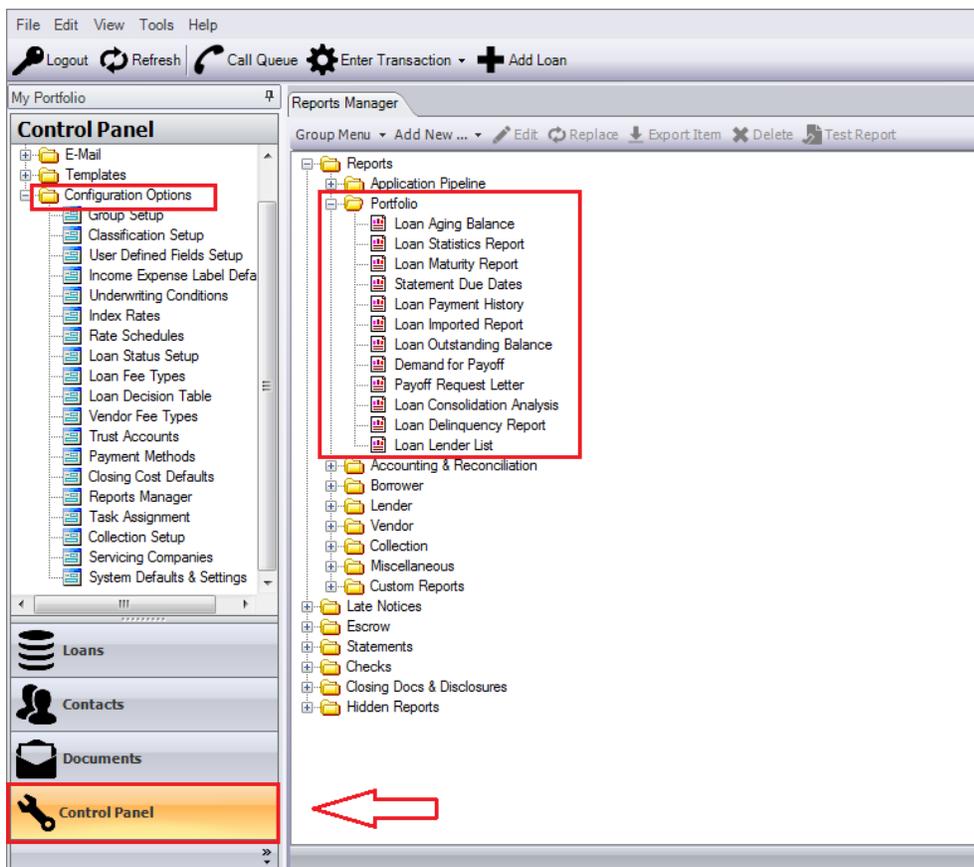
Export the Report

Highlight the loan that you would like to edit. Click Export Item and choose a destination folder to export to.

Edit the Report

LOAN SERVICING SOFT is designed to work with **Microsoft Report Builder 2.0**. The current version of Report Builder as of 01/2024 is available for download here:

https://www.microsoft.com/en-us/download/details.aspx?id=53613

Once installed, simply double click on the report that you just exported. Report Builder has a very easy to use, "What You See is What You Get", WYSWYG interface. Just make the edits you like and save the document.

For more information on building reports from scratch in Report Builder, please see the LOAN SERVICING SOFT Writing Reports How To Doc.

Microsoft also provides many resources on how to create reports using Report Builder. Here is their main tutorial:

http://msdn.microsoft.com/en-us/library/dd220530(v=SQL.100).aspx

<u>Importing a Report</u>

Once you have edited your report, the next step is to import the report back into LOAN SERVICING SOFT. To import an edited report, choose the report you are updating and click Replace.
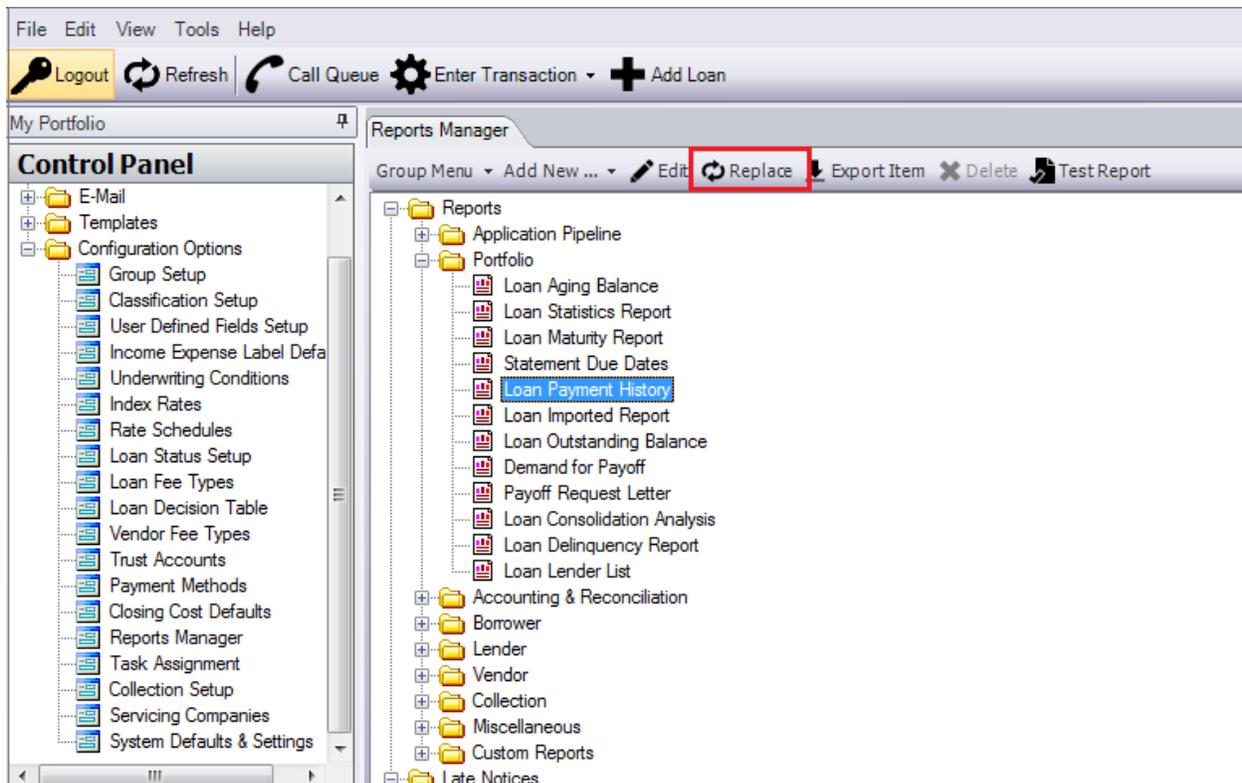
Navigate to the folder where you saved your newly edited report. Click on it and click OK. A dialog box will open asking if you would like to overwrite your existing report with your new customized report. Click ok.
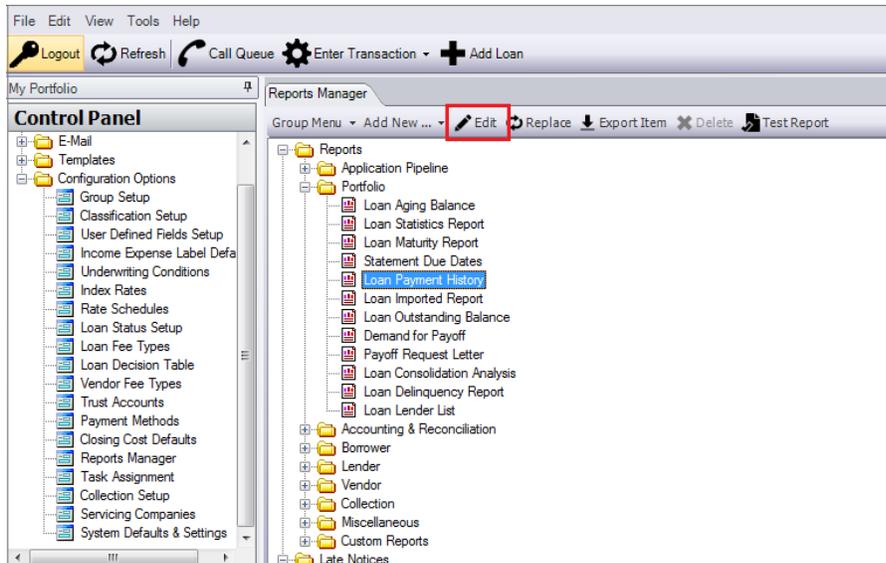
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Test Report

Next test your report by selecting the report and clicking on Test Report.
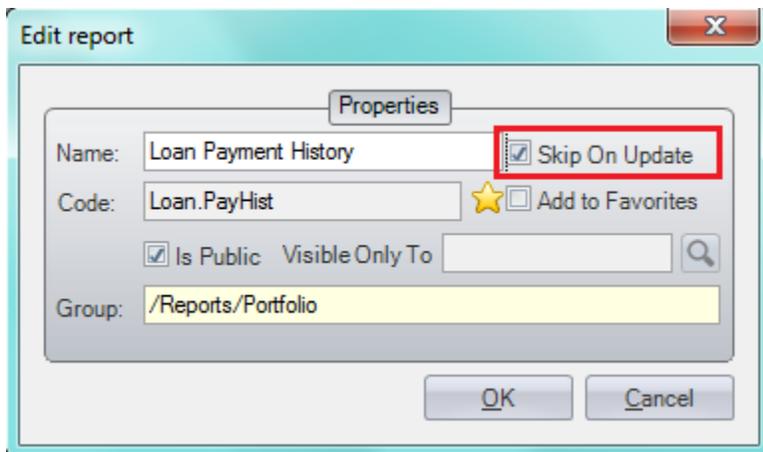
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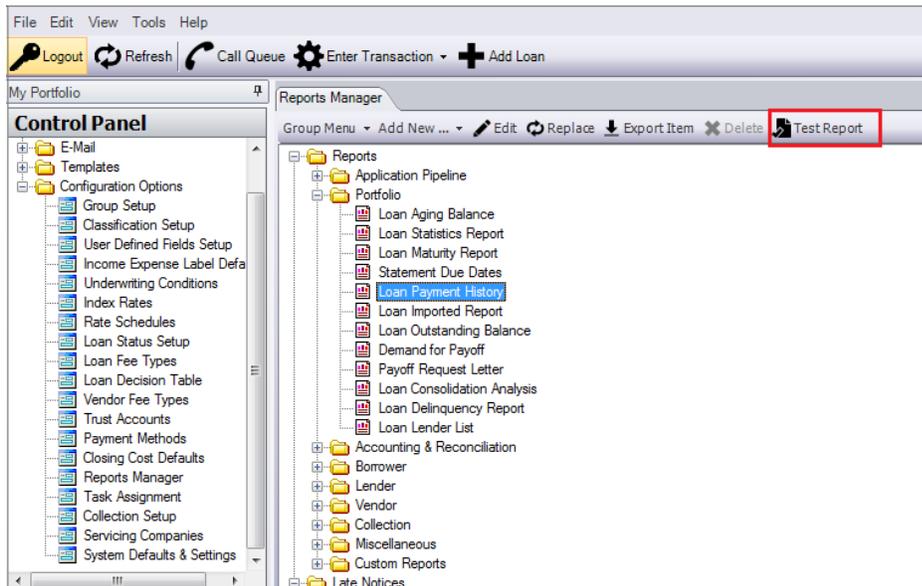
Skip on Updates

Now your customized report has been added to the system. However, to ensure that your customized report is not changed when LOAN SERVICING SOFT is updated, you must tell the system to skip your customized report when updating. To do this, highlight your customized report and click edit.

The Edit Report dialog box will appear.

Check the Skip On Update check box and click on OK. This will ensure that your customized report is not overwritten when LOAN SERVICING SOFT updates are installed.

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