Client Ordering and Report Retrieval Website

The Reliable Reports' **Client Ordering Website** allows client users to submit, view, and retrieve orders across multiple accounts. This document is intended to provide a brief summary of the website as well as highlighting and describing its features.
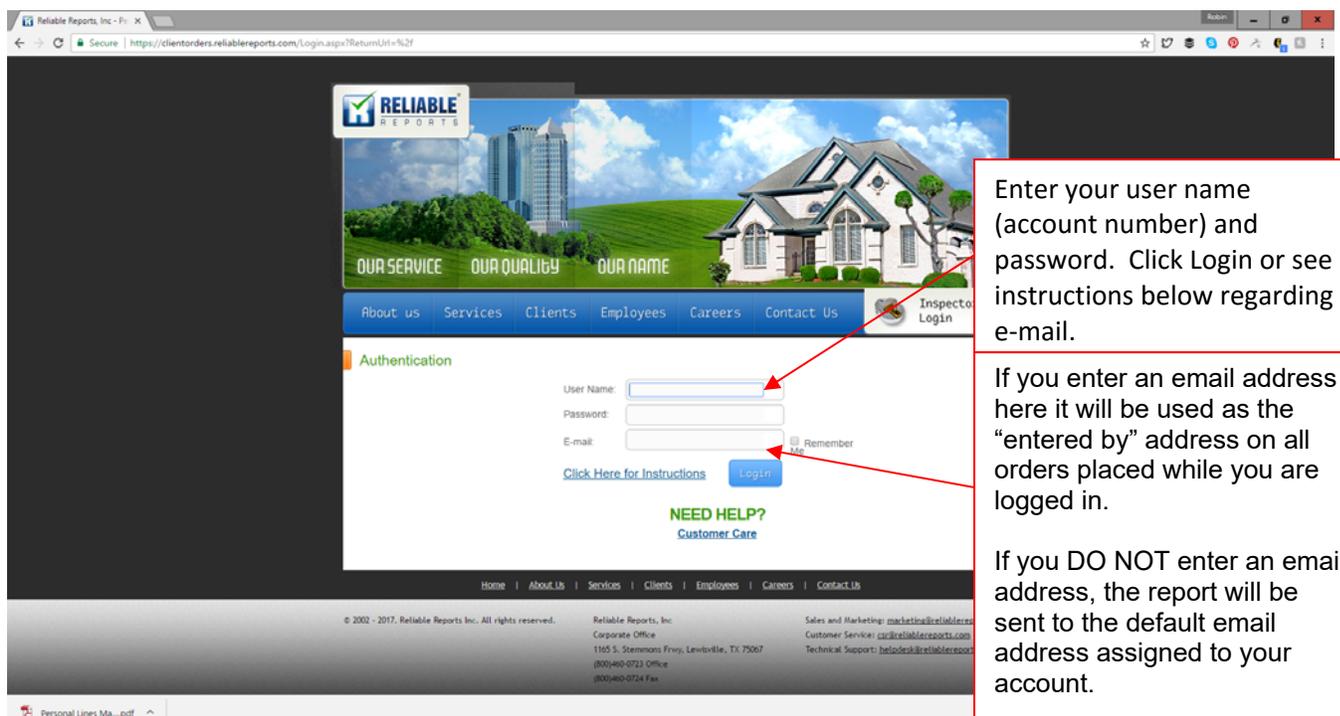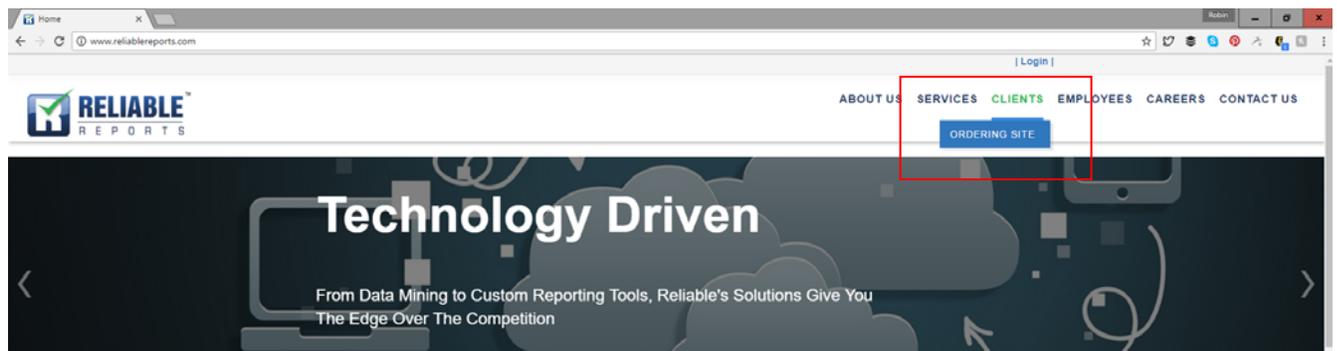
Web Address:
http://www.reliablereports.com

Login information:
Users should be able to use their assigned ReliableNET system logins. For more information or to retrieve your login information, please contact helpdesk@reliablereports.com or 800-460-0723 ext 8006.

To set up individual log-ins for your employees, please coordinate with your Regional Sales Manager.

Enter your user name (account number) and password. Click Login or see instructions below regarding e-mail.

If you enter an email address here it will be used as the "entered by" address on all orders placed while you are logged in.

If you DO NOT enter an email address, the report will be sent to the default email address assigned to your account.

The **Client Ordering Website** is made up of four pages each of which is accessible from the navigation pane located on the left side of your screen. A screenshot of the navigation pane can be seen below:
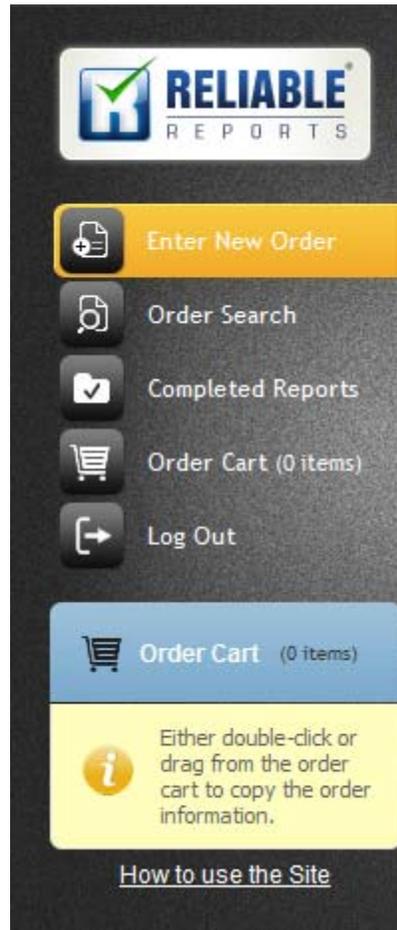
- **Enter New Order** – This page allows the user to submit new orders across a variety of report types, product lines, and individual accounts.

- **Order Search** – This page allows the user to search for previously submitted orders and view their current progress.

- **Completed Reports** – This page allows the user to search, view, download, and send completed reports via email.

- **Order Cart** – This page allows the user to view any orders they've already added to the cart, as well as make edits and access a printable version of the orders they've placed.

- **Log Out** – Clicking this button will log the user out of the **Client Ordering Website**.

   After 30 minutes of inactivity, for security reasons users will be timed out and will be returned to the log-in page.

Placing a New Order

The new client ordering website allows users to have access to multiple accounts. When you first log in, you have the option of selecting the account for which you would like to enter the new order:

Fields that are required in order to submit the new order are marked with a red asterisk * as shown in the screenshot below.

Screen shot of a Commercial Account Order Screen

Once the account is selected, the order information can be entered, including the selection of the main report type and any supplements you would like to order. The available report types and some of the fields on the **Enter New Order** page may change based on the account you have selected.

Choosing Your Report Type

Click on the appropriate report type you would like to order. To see the description of the report, click on the +
sign to the right and a drop down with a description will appear. To close the description box, click on the – sign.

REMINDER: **Only one main report type can be selected per order. All available supplements will be
visible after main report type is selected**.

Once all the appropriate fields have been populated, the user may select the "**Add Order to Cart**" button at the
bottom of the screen. Selecting the "**Clear Order**" button will reset all the fields on the **Enter New Order** page to
their default values (see screenshot below).

Users are also able to copy the order information from orders that are already in the order cart by clicking and dragging the desired order into the Enter New Order section. Alternately, the user may simply double-click the desired order.

Order Cart

The **Order Cart** page allows the user to view the orders they have already entered, as well as edit or delete their orders.

Users are also able to print the full contents of their order cart by clicking the "Print Order" button located at the bottom of the screen. This will open a separate window with a printable version of the contents of the order cart.

Once the user clicks the "Submit Order" button, the orders in the Order Cart will be cleared from the Order Cart and submitted to Reliable Reports Inc. for processing. The user will be provided with the Order ID for their records.
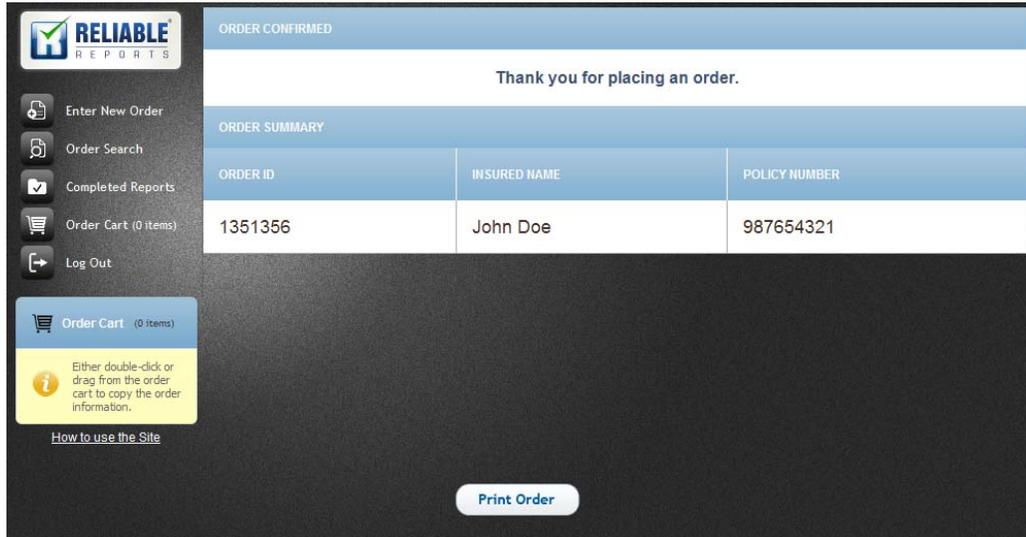
If the user clicks on **Log Out** before submitting their orders, the error message shown below will be displayed:
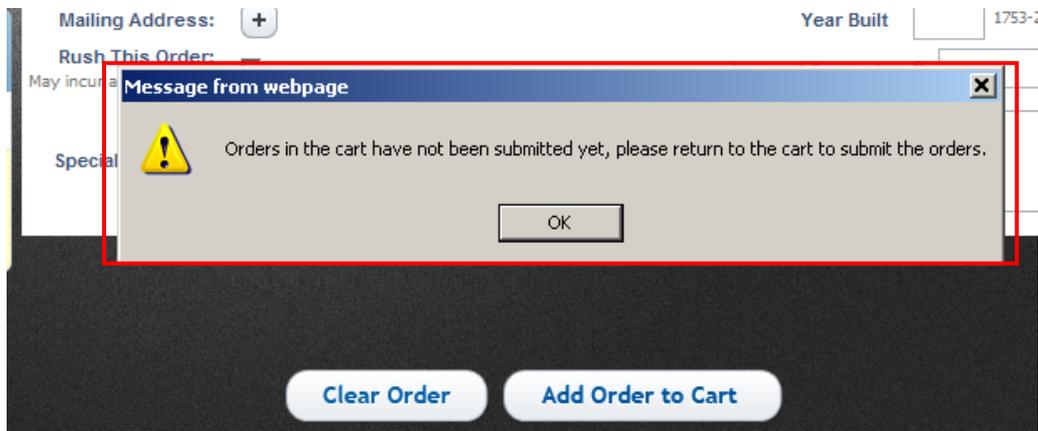
Order Search

The **Order Search** page allows the user to search for orders across a wide variety of fields, including:

- **Policy Number** – This will be the policy number that was designated for the order by the user when it was entered.

- **Order ID** – Searches against current records using the Order ID the user was provided upon submission of the order.

- **Reference Number** – Searches against current orders using the Reliable Reports Inc. internal reference number. This number can usually be obtained from Reliable Reports Inc. Customer Service at csr@reliablereports.com.

- **Insured Name** – Searches against current orders using the insured name information that was provided by the user when the order was first placed.

- **Date Range** – This allows the user to search for orders placed within a specific date range.

- **Status** – This allows the user to search for orders in two statuses: Reports that are currently in progress, and reports that have been completed within the last 60 days.

- **Account** – Allows the user to search for orders pertaining to a specific client account.
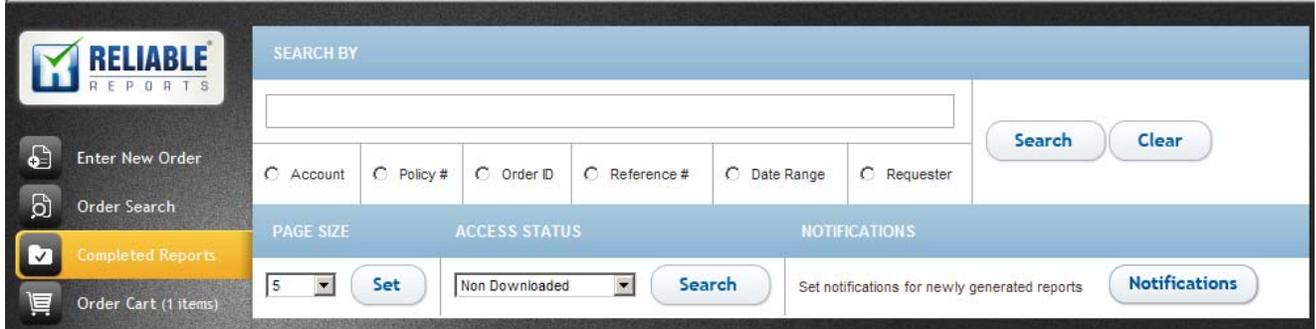
Completed Reports

The **Completed Reports** page allows the user to access, view, email, and download PDF copies of completed reports, as well as search for completed reports matching a variety of criteria (these will be the same criteria available to the Order Search page).

The most important feature of the **Completed Reports** page is the ability to view, download, and send completed records via email. In order to do this, the user will first need to query for records using one of the search criteria mentioned above. Further explanations of each of the search criteria can be obtained by holding the mouse cursor over the item in question.

Records answering the query will be returned in a grid below the search feature:

Clicking on the report name in the **Report Name** column will open a PDF version of the completed report in a separate window.

Items in the grid can be selected and then either downloaded or printed using the buttons featured in the screenshot below.

Finally, the user has the option to set up notifications for newly completed/generated reports by using the **Notifications** button:

When this button is clicked, it will open the following dialogue box that allow the user to turn notifications on or off, as well as set the email address to which the notification should be sent:
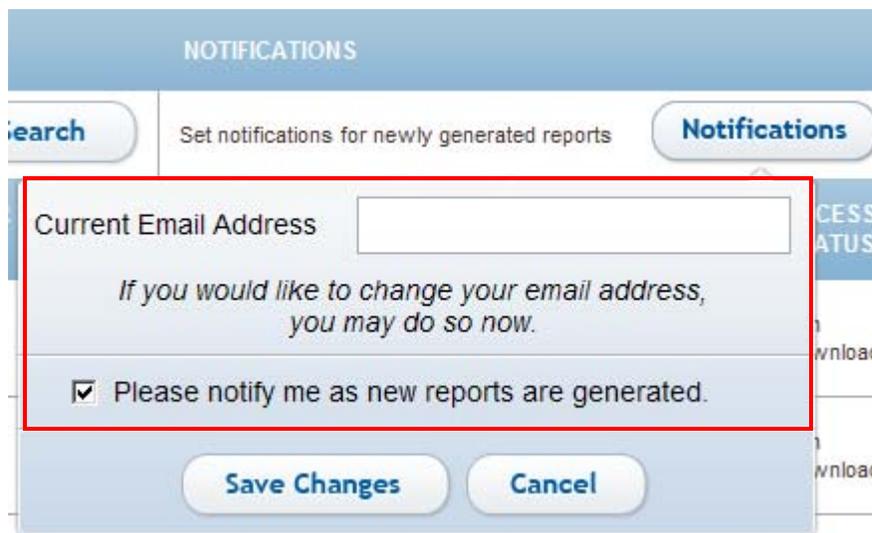
If you have any questions, comments, or concerns, or are in need of technical support, please contact our support center at helpdesk@reliablereports.com or 800-460-0723 ext 8006.