

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.

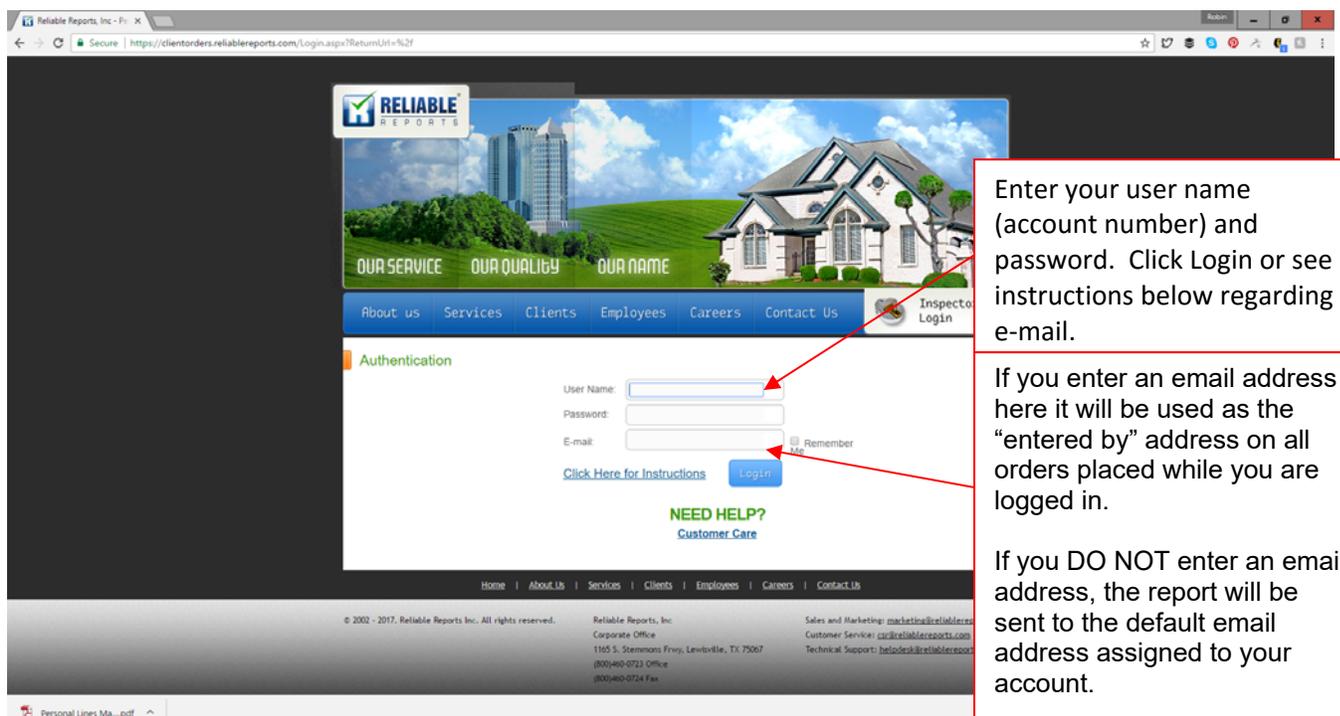
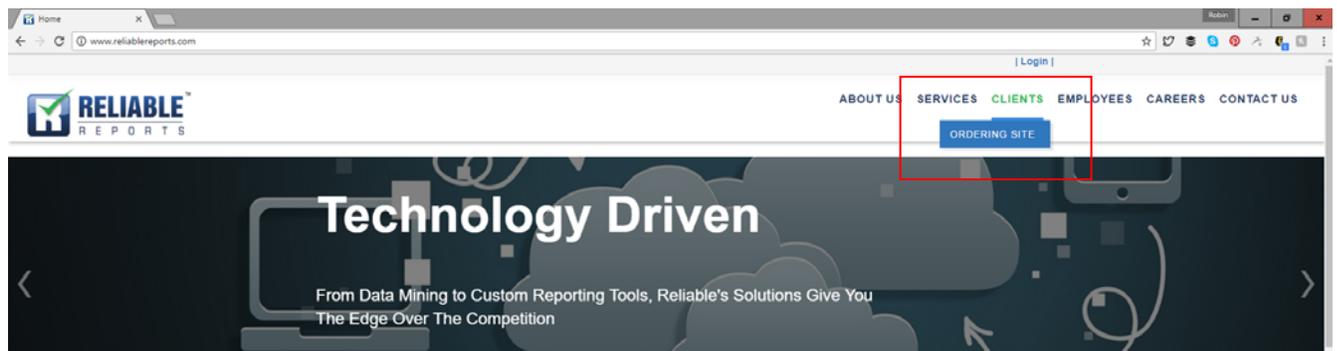
Web Address:

<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.

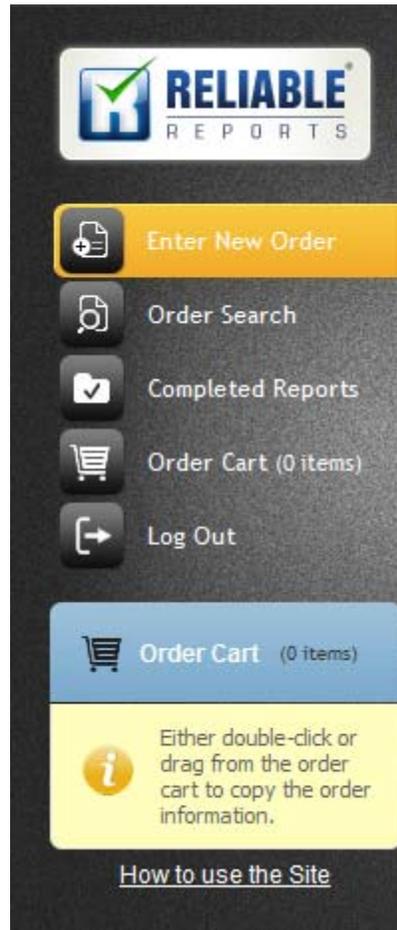
To set up individual log-ins for your employees, please coordinate with your Regional Sales Manager.



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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.

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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:

The screenshot shows the top portion of the 'NEW ORDER - PERSONAL LINES' form. A red rectangular box highlights the 'Account:' dropdown menu, which currently displays 'Select account'. To the right of the dropdown, a red asterisk (*) is visible. Above the form, a blue header bar contains the text 'NEW ORDER - PERSONAL LINES', 'One Location Per Order', and 'DENOTES REQUIRED FIELD TO SUBMIT ORDER' with a red asterisk. On the left side, there is a sidebar with the 'RELIABLE REPORTS' logo and buttons for 'Enter New Order' and 'Order Search'.

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

This screenshot shows the complete 'NEW ORDER - PERSONAL LINES' form. The 'Account:' dropdown is highlighted with a red asterisk. Other fields marked with red asterisks include 'Insured Name:', 'Survey Address:', 'Zip:', 'Contact:', 'Contact Phone:', 'Alt Phone #:', 'Mailing Zip:', 'Mailing Address:', 'Agent Name:', 'Agent Phone:', 'Policy #:', 'Agent Code:', 'Agent Fax:', 'Entered By:', 'Inception Date:', 'Year Built', and 'Insured Amount:'. The 'Rush This Order:' checkbox is also present. The form includes a 'Special Attention:' text area at the bottom. The sidebar on the left contains the 'RELIABLE REPORTS' logo, 'Enter New Order', 'Order Search', 'Completed Reports', 'Order Cart (0 items)', and 'Log Out' buttons. A yellow information box at the bottom of the sidebar states: 'Either double-click or drag from the order cart to copy the order information.' Below this is a link for 'How to use the Site'.

Screen shot of a Commercial Account Order Screen

NEW ORDER - COMMERCIAL LINES
One Location Per Order
• DENOTES REQUIRED FIELD TO SUBMIT ORDER

- Enter New Order
- Order Search
- Completed Reports
- Order Cart (1 items)
- Log Out

Order Cart (1 items)

John Doe ✕

Either double-click or drag from the order cart to copy the order information.

How to use the Site

Account: • Test - IMS Client - 999997

Insured Name:
 DBA:
 Survey Address:
 Zip: State: City:
 Contact: Same as Insured
 Contact Phone: - -
 Alt Phone #: - -
 Mailing Zip: State: City:
 Mailing Address: +
 Rush This Order: May incur additional fees
 Special Attention:

Agent Name:
 Agent Phone: - -
 Policy #:
 Agent Code:
 Agent Fax: - -
 Entered By:
 Occupancy:
 Inception Date: / / mm/dd/yyyy
 Year Built:

RATING BASIS

Payroll: \$ <input type="text"/>	Annual Gross Receipts: \$ <input type="text"/>
Content Amount: \$ <input type="text"/>	Other (Describe in Special Attn): \$ <input type="text"/>
Insured Amount: \$ <input type="text"/>	

PLEASE SELECT A REPORT TYPE ALONG WITH ANY SUPPLEMENTS • Only 1 main report type per location is allowed

CU10 — Commercial Fire Click on the + to see a description of the report type +

ADDITIONAL BUILDINGS ON PREMISES

Building 1:	Occupancy: <input type="text"/>	Insured Amount: <input type="text"/>	Remove
Building 2:	Occupancy: <input type="text"/>	Insured Amount: <input type="text"/>	Remove

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.

PLEASE SELECT A REPORT TYPE ALONG WITH ANY SUPPLEMENTS ⁺ Only 1 main report type per location is allowed

- PP01Bi — Dwelling Report Click on the + to see a description of the report type +
- PP04E2Vi — E2Value Replacement Cost calculation of building value. Click on the + to see a description of the report type +
- PP04RCTA — RCT Replacement Cost Report Click on the + to see a description of the report type -
Exterior inspection of dwelling focusing on rating information (roof type, exterior construction material, foundation type, etc.) liability exposures and general maintenance and condition of property. Report will also include measurement, identification of appurtenant features and (RCT) replacement cost using MSB RCT.
- Roof Supplement — +

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).

NEW ORDER - PERSONAL LINES One Location Per Order DENOTES REQUIRED FIELD TO SUBMIT ORDER

Account: Test Corp. - 999999

Insured Name: John Doe Agent Name: Jane Doe

Survey Address: 123 Main Street Agent Phone: 123 - 456 - 7890

Zip: 75067 State: City: Policy #: 123456789

Contact: John Doe Same as Insured Agent Code:

Contact Phone: 789 - 123 - 4567 Agent Fax:

Alt Phone #: Mailing Address: Entered By: dstorie@reliablereports.com

Mailing Zip: State: City: Inception Date: mm/dd/yyyy

Year Built: 1753-2011

Insured Amount: \$

Rush This Order: May incur additional fees

Special Attention:

PLEASE SELECT A REPORT TYPE ALONG WITH ANY SUPPLEMENTS ⁺ Only 1 main report type per location is allowed

- PP01Bi — Dwelling Report Click on the + to see a description of the report type -
Exterior inspection of dwelling focusing on rating information (roof type, exterior construction material, foundation type, etc.), liability exposures and general maintenance, condition of property, and protection distances.
- Roof Supplement — Dwelling Observation +
- Interior Assessment Supplement — Dwelling Observation +
- Wood Burning Stove Supplement — Dwelling Observation +
- Electrical, Heating, and Plumbing Supplement — Dwelling Observation +

Clear Order Add Order to Cart

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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.

The screenshot displays the 'NEW ORDER - PERSONAL LINES' interface. On the left sidebar, the 'Order Cart (1 items)' section is highlighted with a red box. It shows an order for 'John Doe' and an informational message: 'Either double-click or drag from the order cart to copy the order information.' Below the message is the text 'How to use the Site'. The main form area includes fields for 'Account' (Test Corp. - 999999), 'Insured Name', 'Survey Address', 'Zip', 'State', 'City', 'Contact', 'Contact Phone', 'Alt Phone #', 'Mailing Zip', 'Mailing Address', 'Rush This Order', and 'Special Attention'. A blue banner at the bottom reads 'PLEASE SELECT A REPORT TYPE ALONG WITH ANY SUPPLEMENTS'.

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.

POLICY NUMBER	ACCOUNT NUMBER	ORDER DATE	
9999	999999	07/28/2011	Edit Delete

Insured Name: A B Insured Address: 1235 Report Type: PP01Bi Requested by: ISD Rep

Special Attention

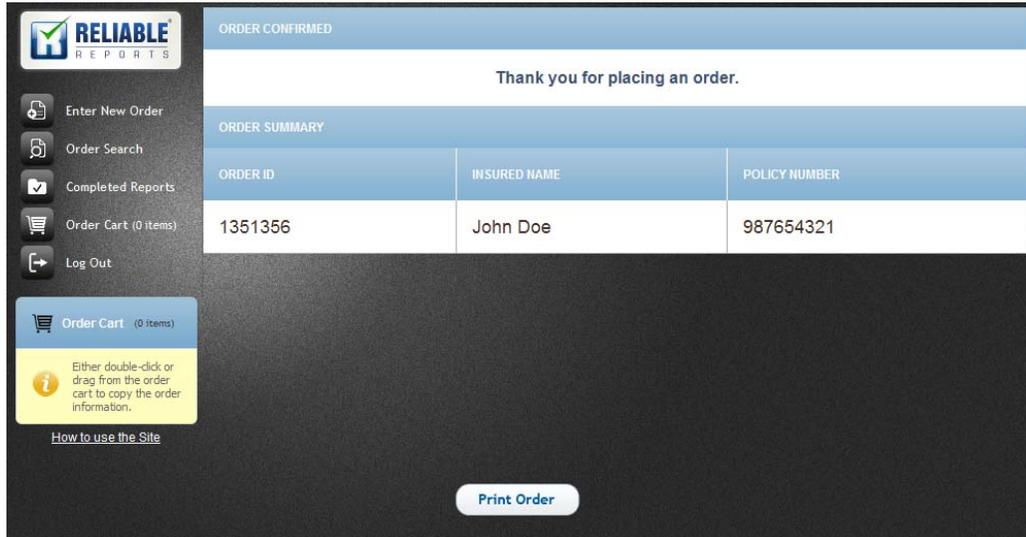
Submit Order Print Order

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.

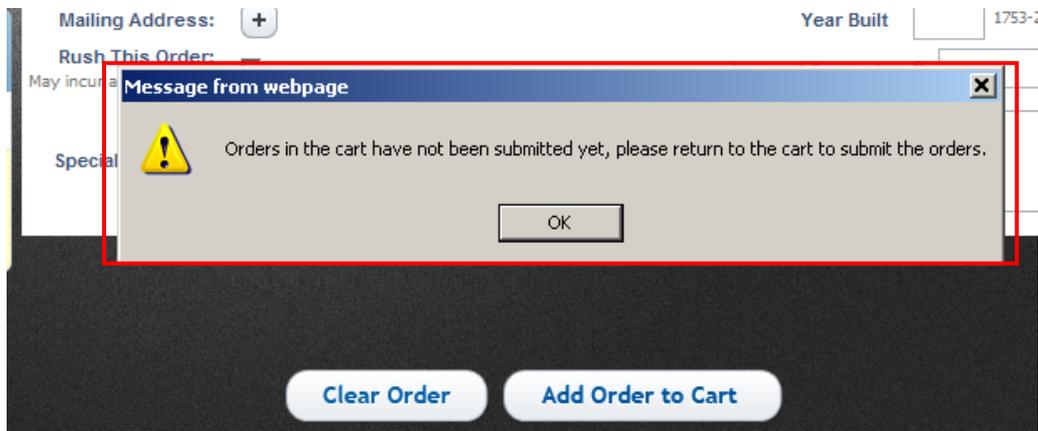
Policy:	987654321	Insured:	John Doe	Requestor:	dstorie@reliablereports.com
Account:	Test Corp. - 999999	Address:	123 Main Street, undefined, LEWISVILLE TX, 75067	Report(s):	PP01Bi, Roof Supplement
Order Date:	12/15/2011	Order ID:	1351356	Special Attention:	

*Note — Orders in the Order Summary have not yet been submitted for processing.

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.

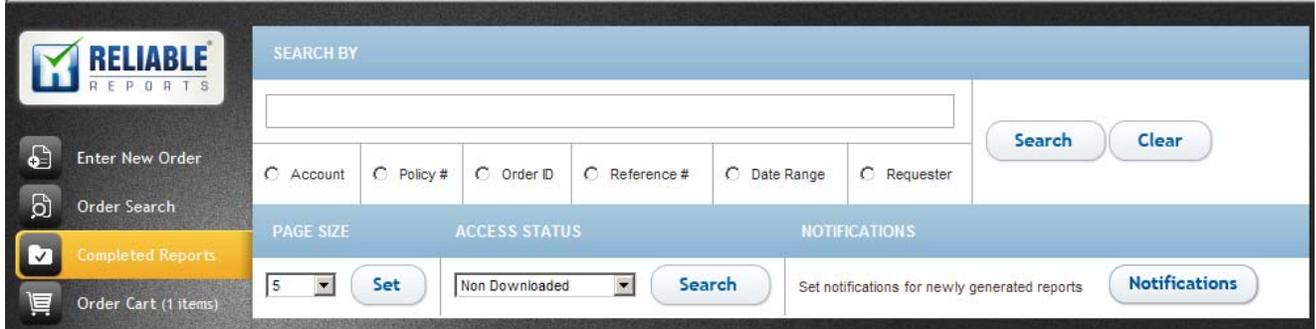
The screenshot displays the 'ORDER SEARCH' interface. On the left is a navigation sidebar with the 'RELIABLE REPORTS' logo and menu items: 'Enter New Order', 'Order Search' (highlighted), 'Completed Reports', 'Order Cart (0 items)', and 'Log Out'. Below the sidebar is an 'Order Cart (0 items)' section with an information icon and a tip: 'Either double-click or drag from the order cart to copy the order information.' and a link 'How to use the Site'. The main content area is titled 'ORDER SEARCH' and features a search bar with a 'Search' button. Below this are four radio button options: 'By Policy #', 'By Order ID', 'By Reference #', and 'By Insured Name'. The next section is 'SEARCH BY DATE RANGE' with 'From' and 'To' date pickers and a 'Search' button. The 'SEARCH BY STATUS' section has radio buttons for 'Completed Report (Last 60 Days)', 'Reports In Progress', and 'Both', with a 'Search' button. The 'SEARCH BY ACCOUNT' section has a dropdown menu set to 'All Accounts' and a 'Search' button.

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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:

POLICY #	REF #	INSURED NAME	ORDER ID	CLOSED DATE	REPORT NAME	SIZE	DOWNLOADED DATE	ACCESS STATUS
<input type="checkbox"/> 94-BA-742	5362101	LOOPER, DA		06/12/2009	RF04 - Roof	199605		Non Downloaded
<input type="checkbox"/> 04-BB-950	5362102	BRAMEL, LUI		06/12/2009	RF04 - Roof	857815		Non Downloaded
<input type="checkbox"/> 04-BK-378	5362103	TAYLOR, WE		06/12/2009	RF04 - Roof	199505		Non Downloaded
<input type="checkbox"/> 04-BQ-469	5362104	LESEMAN, HI		06/12/2009	RF04 - Roof	167922		Non Downloaded
<input type="checkbox"/> 04-BK-641	5362105	CROSS, VER		06/12/2009	RF04 - Roof	167611		Non Downloaded

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

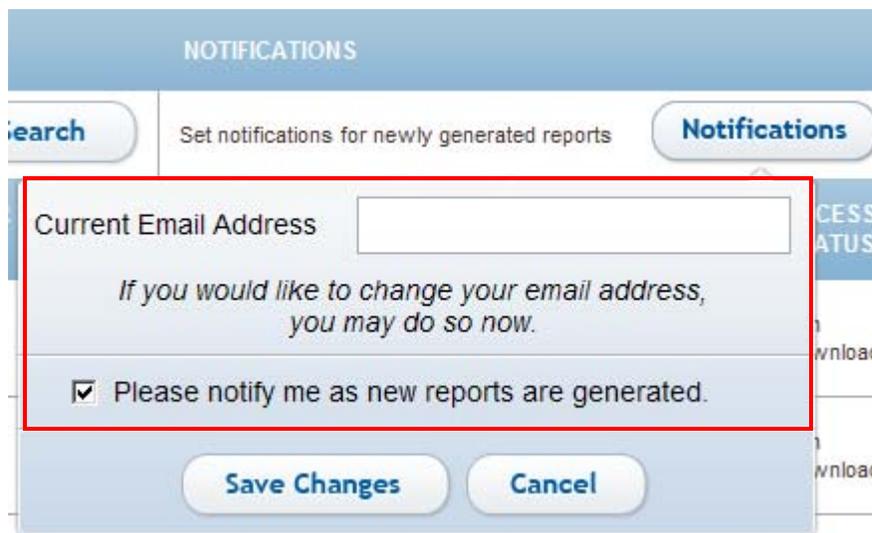
Items in the grid can be selected and then either downloaded or printed using the buttons featured in the screenshot below.



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.