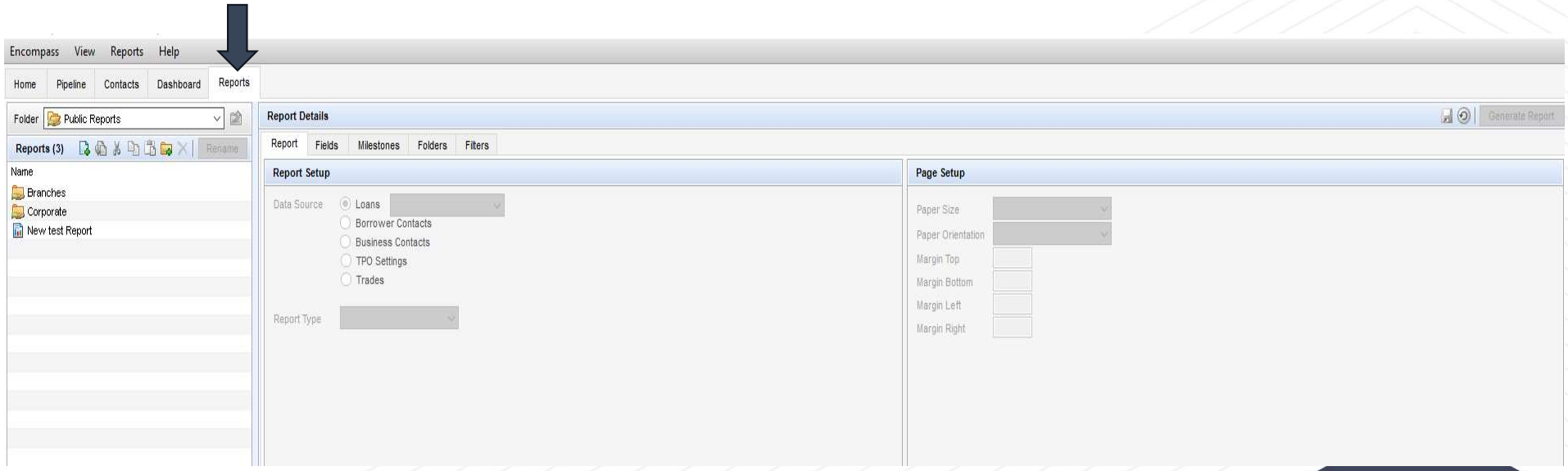
Encompass
Branch Reports

M/I FINANCIAL, LLC
A Subsidiary of M/I Homes, Inc.

Branch Reports

To access branch reports, you will view through your reports tab.



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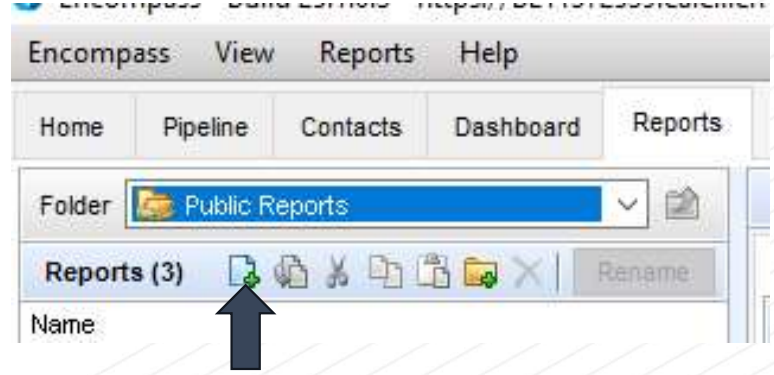
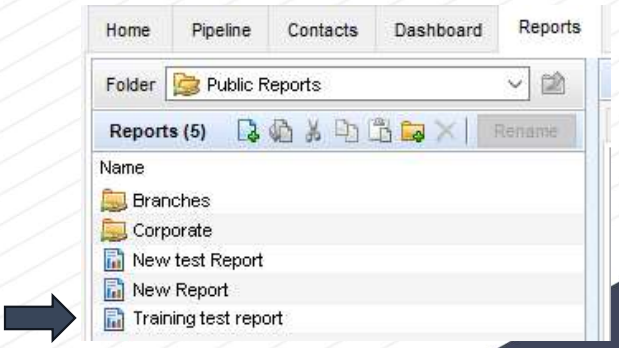
Branch Reporting – Creating a New Report

In reports you will want to use the plus sign in order to establish a new report.

Encompass will add a new report. You can rename it to your needs. You will just need to double click in the name in order to change the name of the report.





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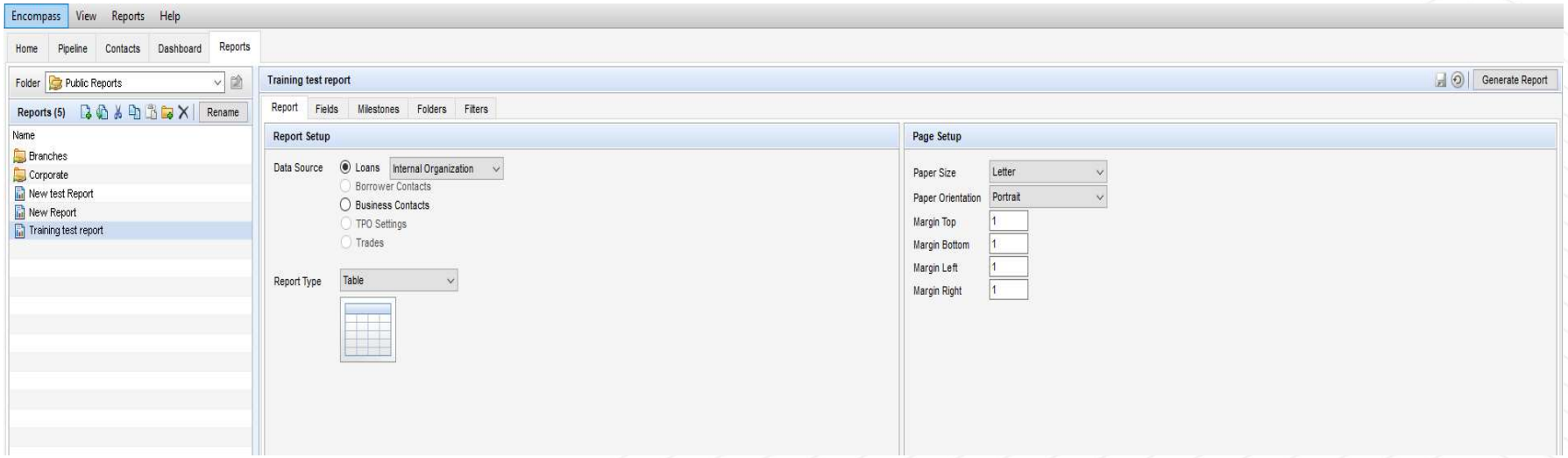
Branch Reporting – Creating a New Report



The reporting area has several filters on fields you may want to use as apart of your reporting folder.

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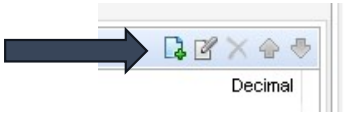
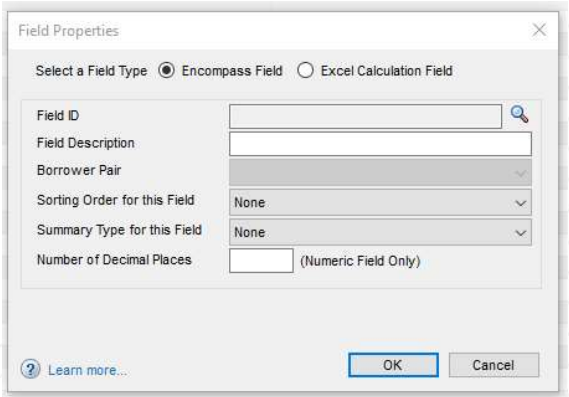
Branch Reporting – Obtaining Fields





You will want to start your individual report by adding new fields to your report. Utilizing the Plus sign, it will bring you to field properties to narrow down your selection.

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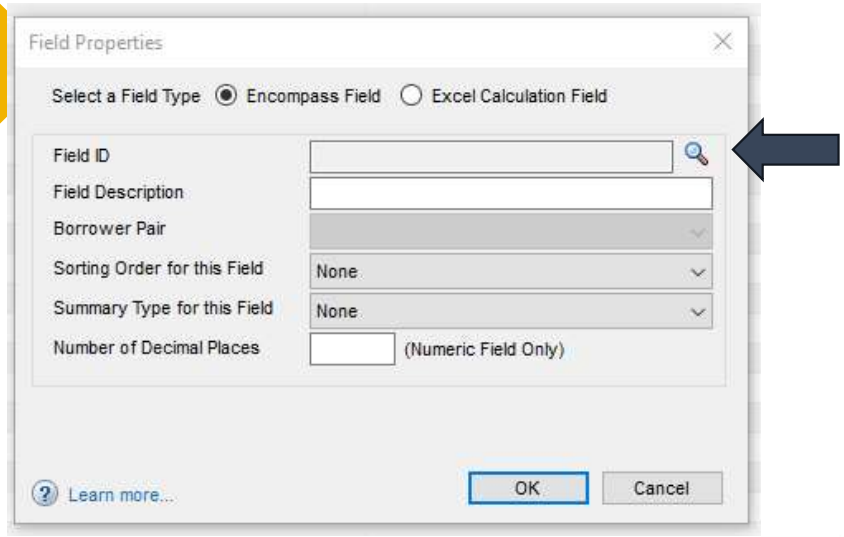
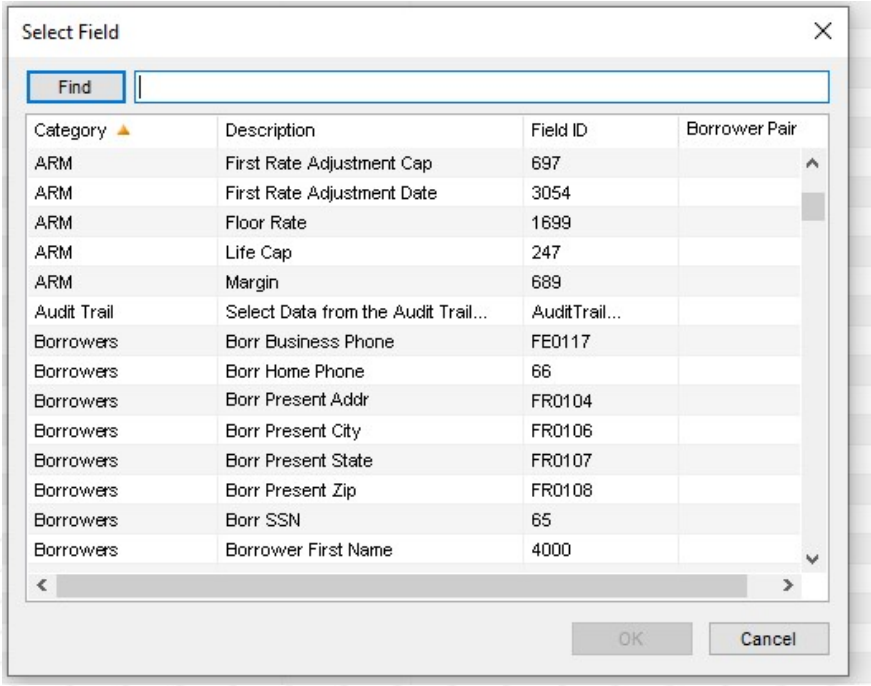
Branch Reporting – Obtaining Fields





You will use the search/find field ID button to look up the description of the field you would like to add.

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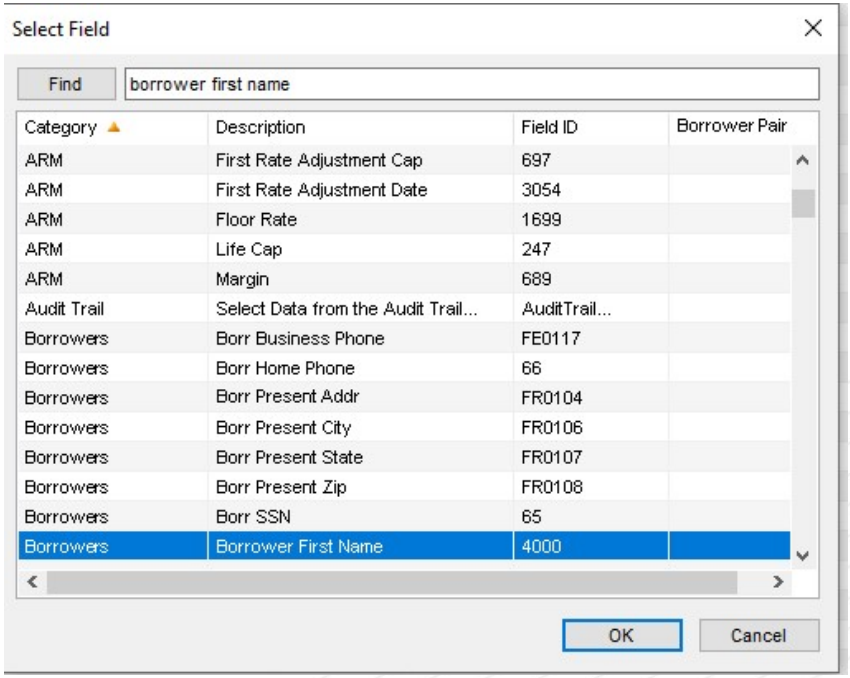
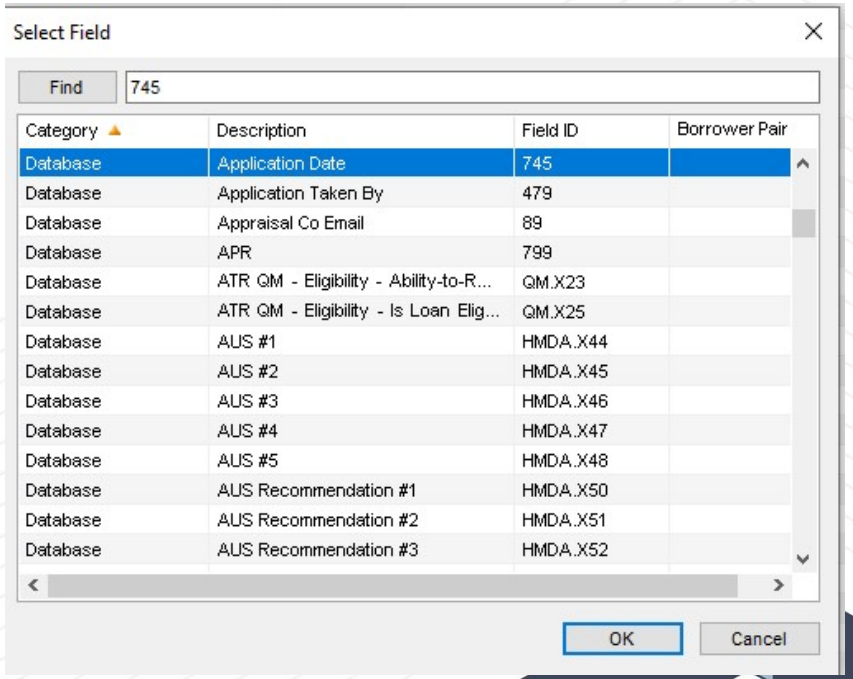
Branch Reporting – obtaining fields

You can search by field number or description.





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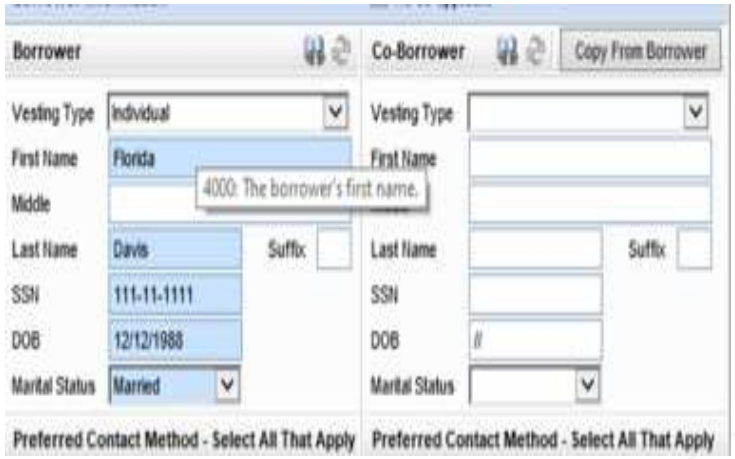
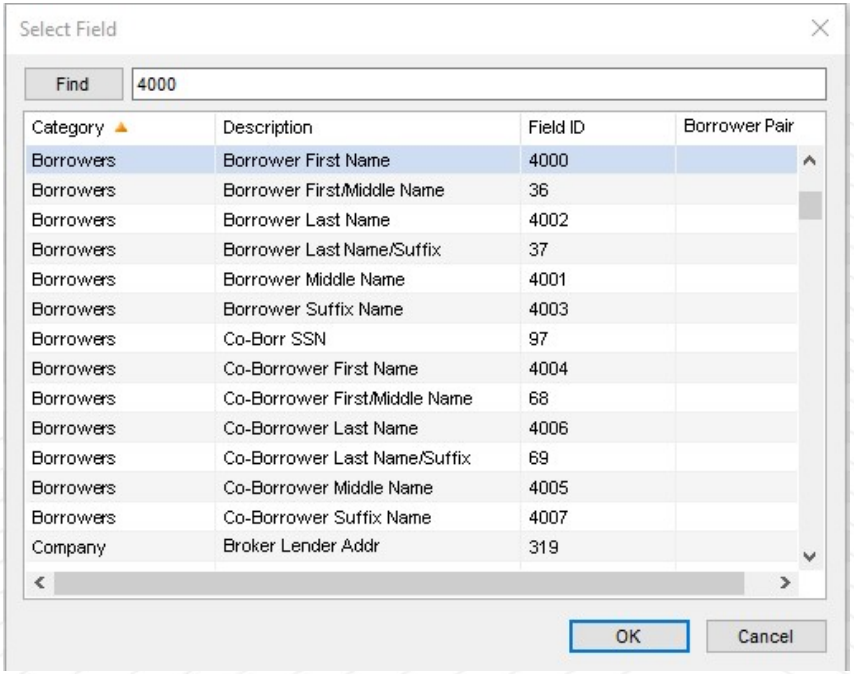
Branch Reporting – Field ID





If you want to find a field number in encompass, hover over the area or you can do ctrl+G to locate the field id.
Input the field number into the find button, and it will bring up the description for you to pick and press ok.

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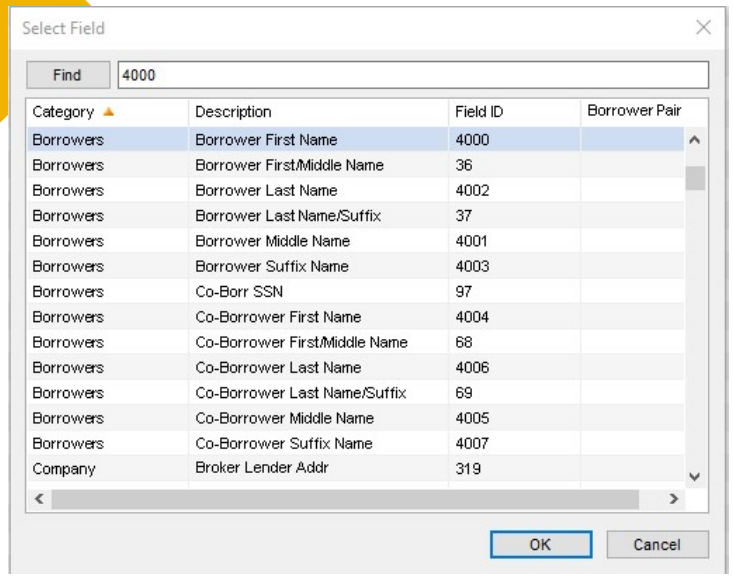
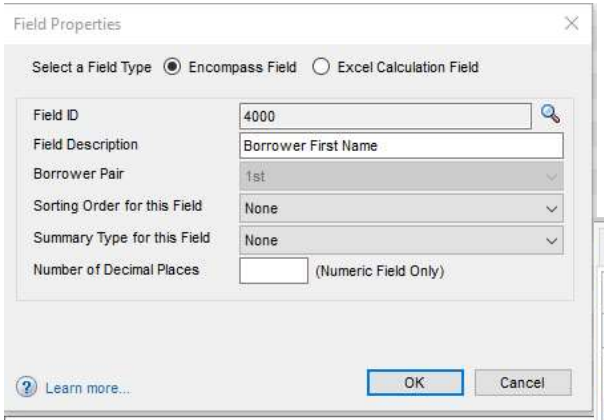
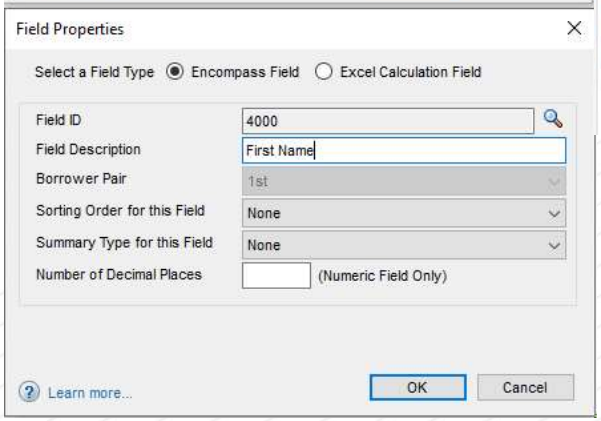
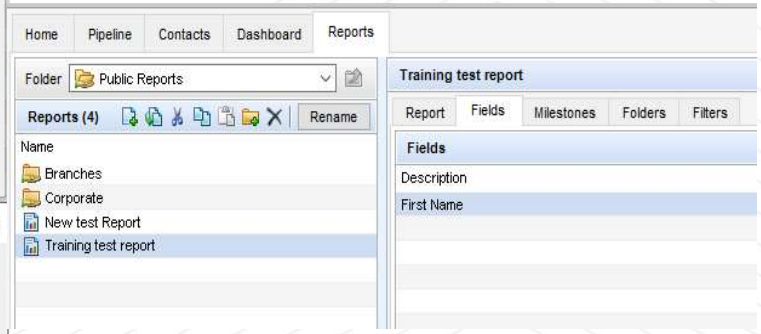
Branch Reporting – Creating Fields









Once you have selected the field and pressed ok, it will bring you to where you can edit your field description of the report. You can leave it as is or rename the field. Press okay, then it will become a field in your report.

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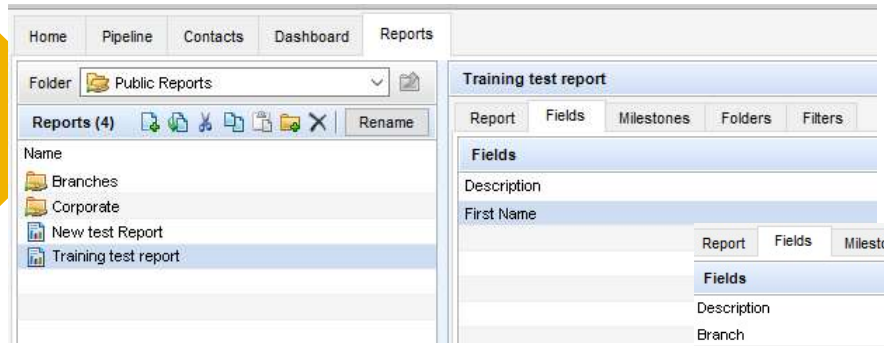
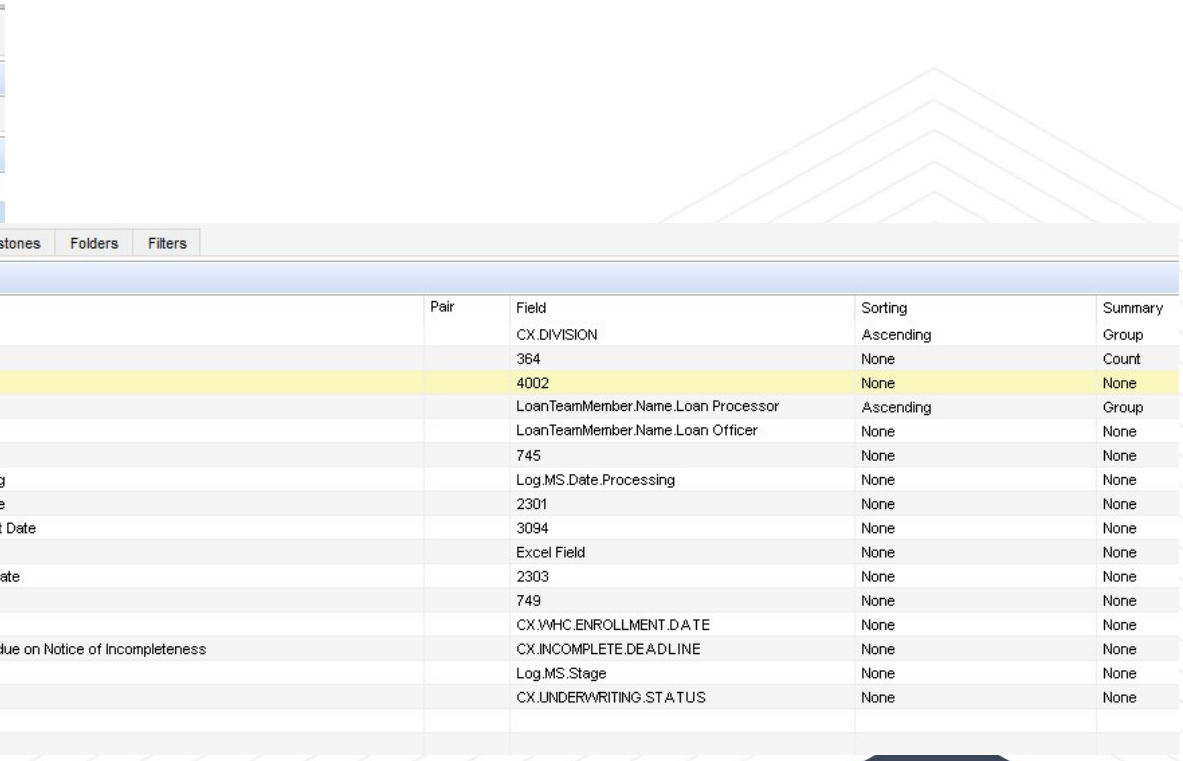
Branch Reporting – Creating a Report





You can create a report with the fields you have chosen, and it will show as apart of your description and field.

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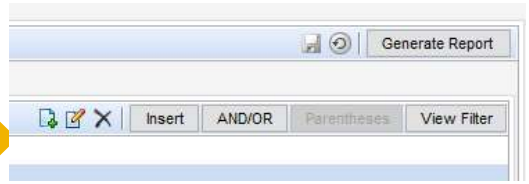
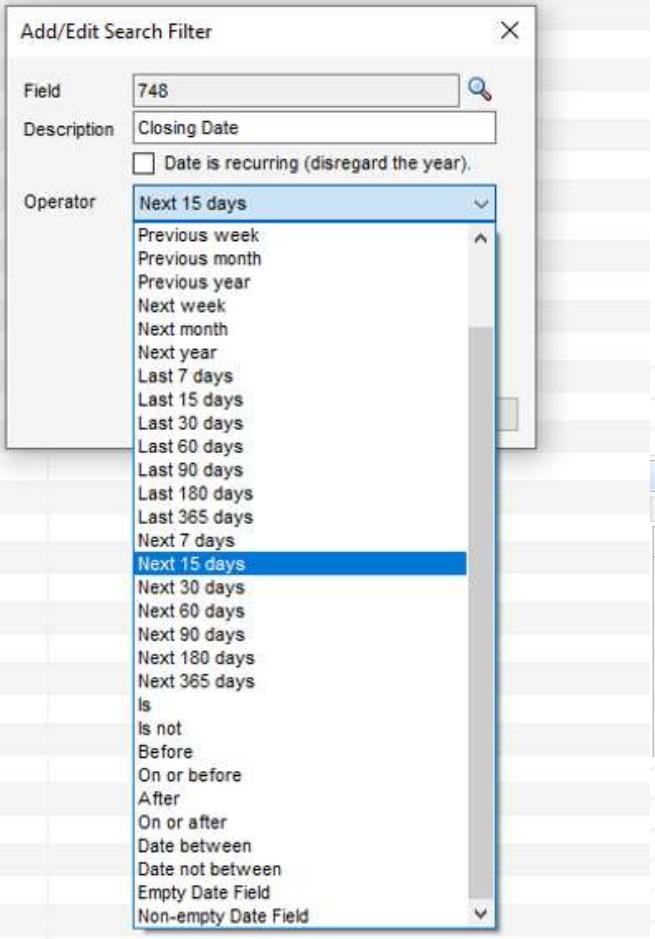
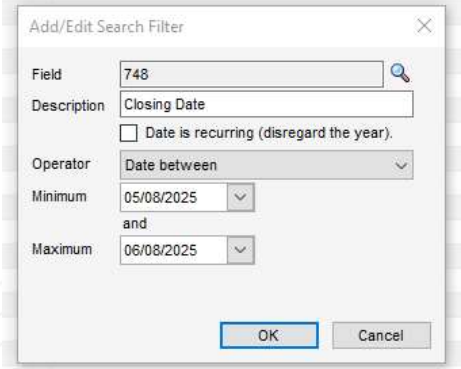
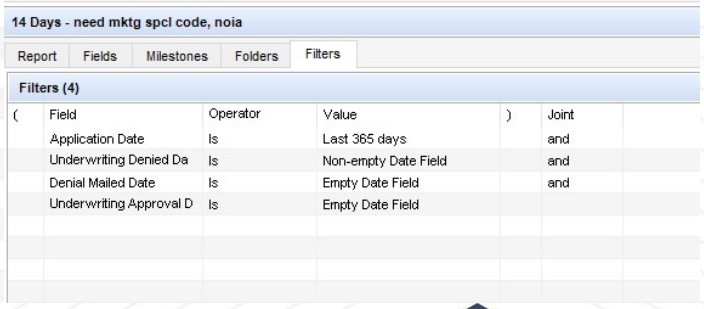
Branch Reporting – Date specific



As apart of your reports, you can get date specific. You can apply filters to your specific report. To apply a filter, you will just need to press the add sign and select the filters you will need.







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Branch Reporting – Generating a Report

Once you have your fields input, you will want to generate that report. The generate report button is on the top right of the screen.
The report will automatically generate into an excel spreadsheet for your review and editing.

Branch	Loan #	Last Name	Loan Processor	Loan Officer	Application Date	Milestone Date - Processing	Underwriting Approval Date	Mortgage Loan Commitment Date	# days
Austin	000100378	Homeowner	Cecilia Ulla	Mike Young	3/5/2025	3/8/2025	3/5/2025		62
	000100536	Homeowner		Pam Howard	4/7/2025		4/10/2025		26
	000100537	America		Suzanne Harvey	4/7/2025	4/17/2025	4/9/2025		27
	000100396	Builder		Mike Young	3/5/2025	3/6/2025	3/6/2025		61

M/I TITLE AGENCY

M/I TITLE, LLC

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TransOhio Residential Title

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