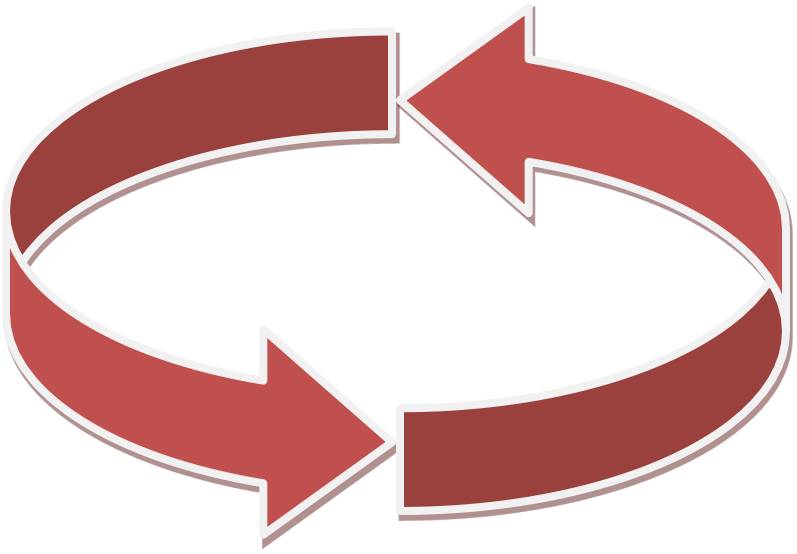


New Client Setup

System Training Manual

PORTFOLIO SAMPLE

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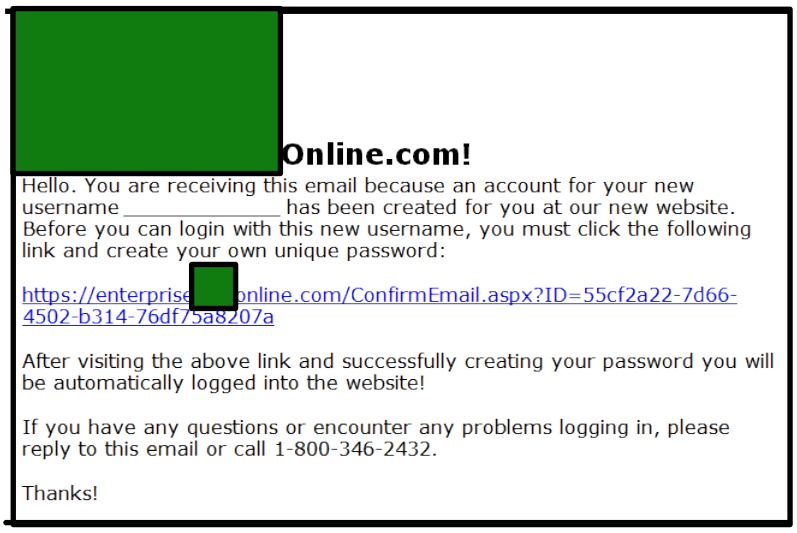
Logging In

Areas covered in this section:

- Welcome Email
- Email Verification Form
- Login Information Email
- Login Page
- Password Recovery Page
- Password Recovery Email
- Change Password Page
- Password Change Successful Email

Welcome Email

A user account, also referred to as a login account, is required to access the website. The System Administrator creates these accounts. When the System Administrator creates a new user account, the user will receive a Welcome Email at the email address.



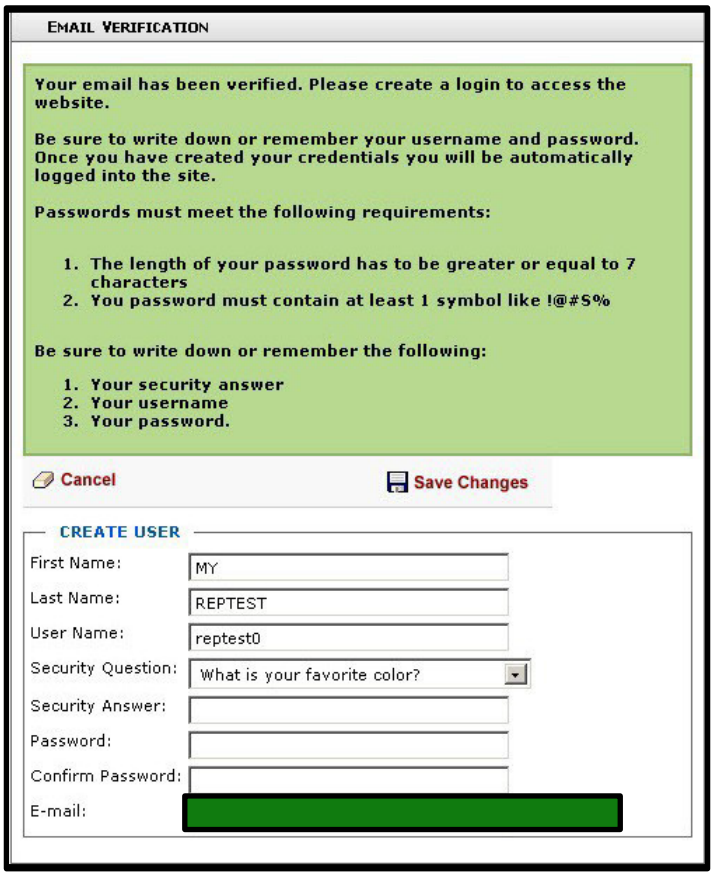
NOTE: Click the email to create the user's password.

NOTE: The Welcome Email will contain the user name to log in.

CAUTION: The link provided in the Welcome

Email Verification Form

When the Welcome Email link is clicked, the Email Verification page will display in a web browser. Information provided to the System Administrator will appear in the First Name, Last Name, and Email fields. The User Name assigned will also be displayed. The following fields must have information provided to log in to the website successfully.



Feature – Required Fields	Description
Security Answer	Information in the free text field relates to the security question selected.
Password	This field requires the following: • A minimum of 7 characters • At least one symbol • A mixed case
Confirm Password	Enter the same characters that were entered in the Password field.

NOTE: To save the Password, click the Save changes button.

NOTE: If Password creation is successful, the user is automatically logged into the website. If Password creation has been successful, the user will receive the Login Information Email.

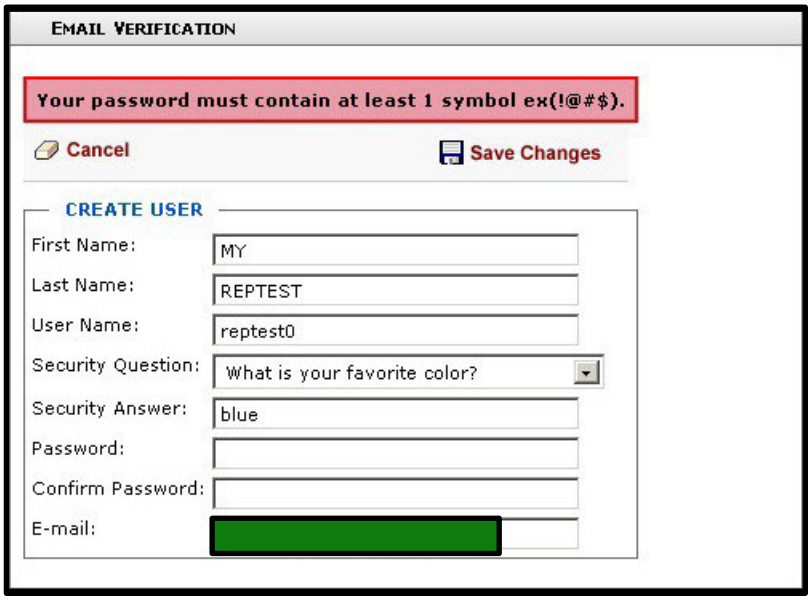
NOTE: After 30 minutes of inactivity, the user will be logged out.

NOTE: Passwords expire every 60 days, and the last six passwords are stored. The user has three attempts with a five-minute window, and then the user will have to wait 15 minutes before trying again.

CAUTION: If the user is not automatically logged in to the website and does not see the website's Home page, they have not successfully created their Password. Click the link in the Welcome Email.

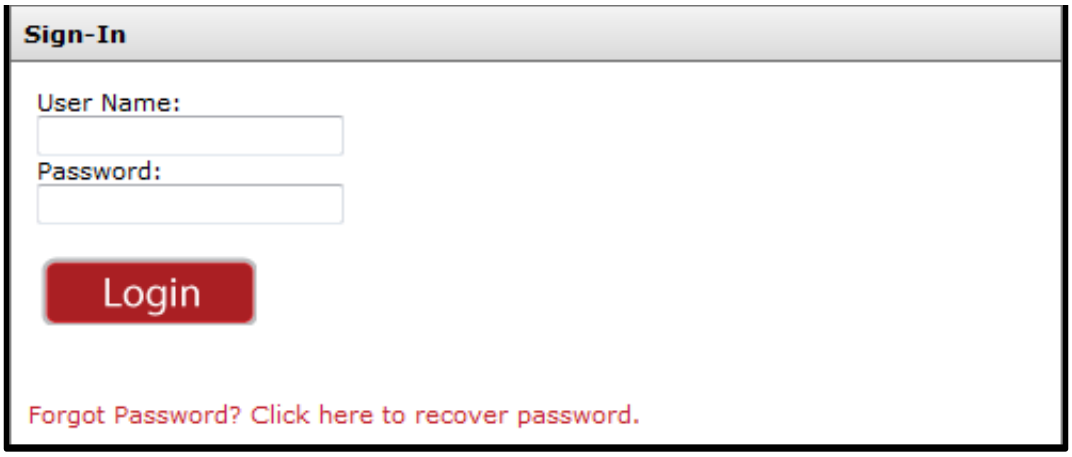
CAUTION: The welcome Email link will appear if the user has activated the newly created email address. Use the Password Recovery for a forgotten Password if the user's password is already set up.

CAUTION: After 90 days of inactivity, the account will automatically be disabled.



Login Page

If users go to the company website and click the Login button, they will be redirected to the Login Page.



Feature – Required Fields	Description
User Name	The User Name provided in the Welcome Email and seen on the Email Verification Form must be used.
Password	The Password created on the Email Verification Form must be used.

NOTE: If the incorrect User Name and Password are used, then Invalid Login displays.

NOTE: If the Password is unknown, use the " Recover Password " link.

CAUTION: If the User Name is unknown, refer back to the Welcome Email, which contains the User Name.

Password Recovery Page

If the user forgets their password, click Forgot Password to recover it.



If the correct information is provided, the user will receive a new password to log in. The user will be required to enter the following information:

Feature – Required Fields	Description
User Name	Utilize the User Name provided in the Welcome Email on the Email Verification Form.
Security Answer	The security question selected on the Email Verification Form is displayed ONLY when a valid User Name is issued.

NOTE: If the user gives the wrong User ID, access is denied. The message "Please try again" will appear.

NOTE: If the incorrect security answer is given, your answer will not be verified. The message "Please try again" will appear.

CAUTION: If the user forgets their User ID or security answer, contact IT for assistance.

Password Recovery Email

When a user provides correct User Name and Security Answer information during Password Recovery, an email message is sent to the user's mailbox. The email will contain both the User Name and a new Password that must be used to access the website.

CAUTION: If the user attempts to log in with their old Password or incorrectly enters the newly provided Password Invalid Login displays.

CAUTION: The newly provided Password MUST be used to log in.

Change Password Page

When users log in to the website, they may change their Password, Security Question, and Security Answer at any time. Knowing how to do this may be helpful if Password Recovery has been used, and a highly complex Password was assigned.

In the upper-left of the website, the user's name is shown. This name is a clickable link that accesses the user's profile. After clicking this link, there is a tab labeled Change Password.

To change a Password:

Feature – Required Fields	Description
Password	The Current Password or the Password that was recently used for logging in must be provided in this field.
New Password	This field requires the following: • A minimum of 7 characters • At least one symbol
Confirm New	This field must match what is in the New Password field.
Security Question	This is a selectable list that requires one of the following to be selected: • What is your favorite color? • What is your mother's maiden name? • What is your pet's name? • What city were you born in?
Security Answer	Information in this field relates to the security question selected.

NOTE: If the password change is successful, you will receive an email confirmation of the change.

CAUTION: If the current Password is incorrect or if any other Password requirement is not met, an error message will appear. Read the error message carefully to understand what is wrong. Repeat steps each time an attempt to change the password fails.

Password Change Successful Email

When a user has successfully changed their password, they will receive an email confirmation indicating the change was successful.

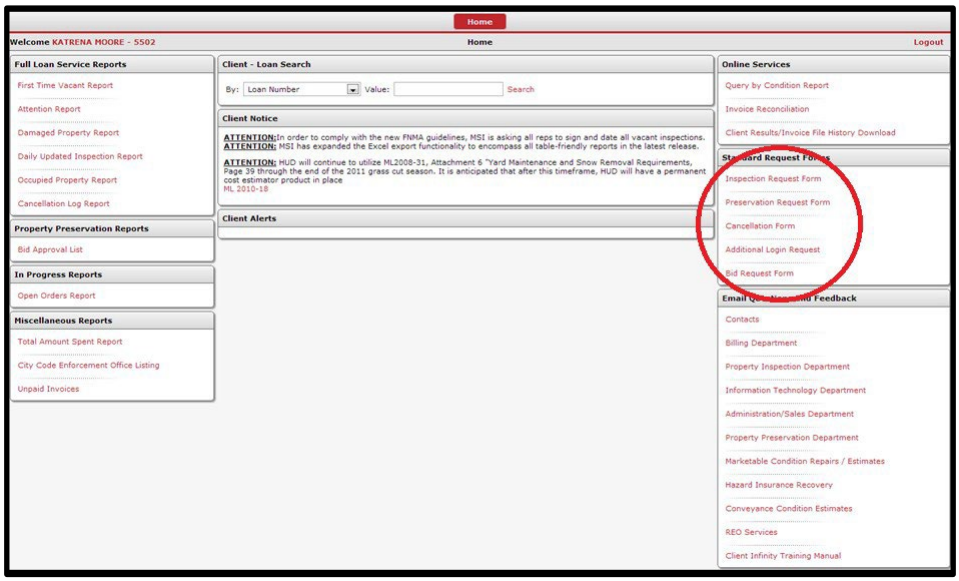
CAUTION: If you receive a password change email and the user didn't request it, contact IT immediately.

Client Features

Areas covered in this section:

- Client-Inspection Request Form
- Client-Preservation Request Form
- Client-Additional Login Request Form
- Client-Bid Request Form
- Client-Cancellation Form
- Client-Loan Search
- Client-Reports
- Client-Online Services

Access all Inspection Request Forms below:



Client – Inspection Request Form

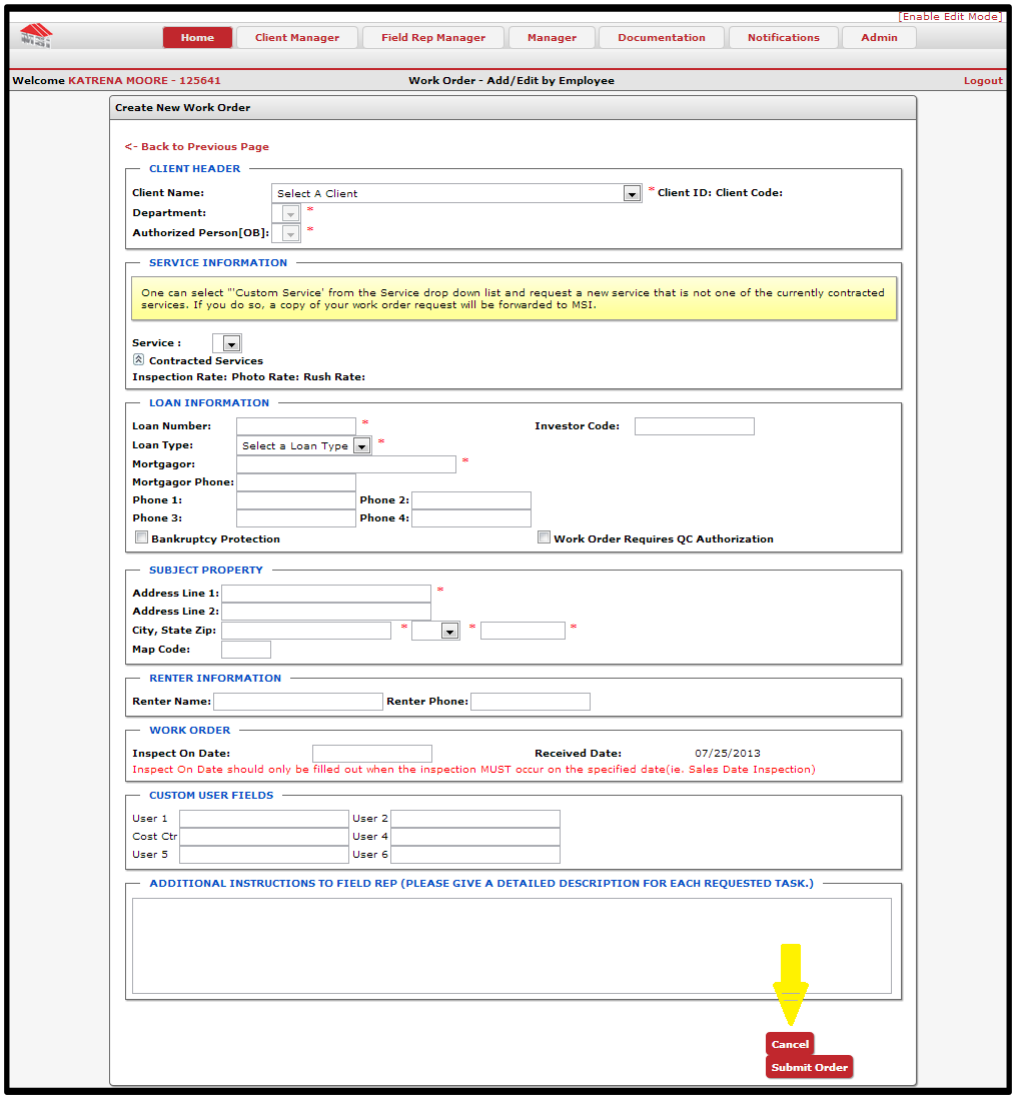
When a Client wants some INSPECTION work, they can submit a work order via the Inspection Request Form. There are many fields on the form; however, the following are the minimum required fields of information to create a work order successfully.

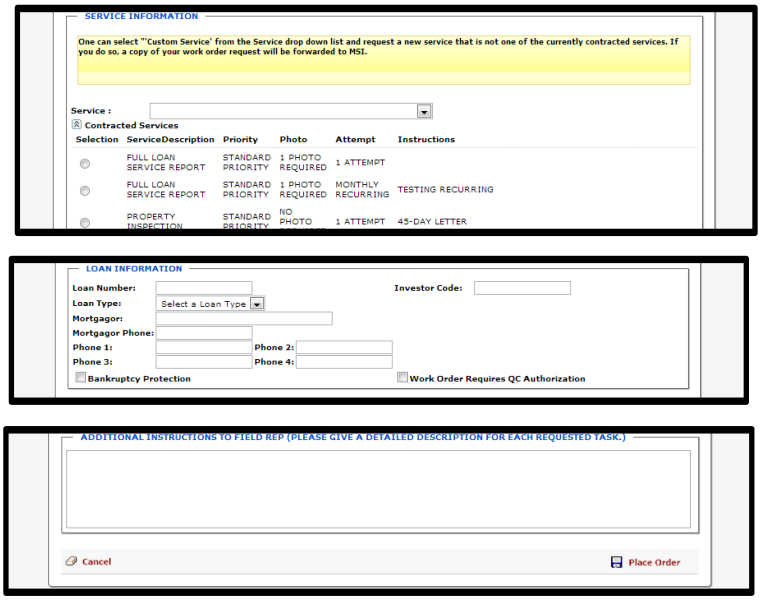
Feature – Required Fields	Description
Department	The selectable list is a required field of department names. Select the department name from the list. **CAUTION: If an expected Department is not listed, clients should submit a request to add the department.**
Service	The selectable list is a required field of services that the company can provide. Select a service from the list. **NOTE: Contractual services are displayed as radio buttons when a service is selected.** **NOTE: Selecting radio buttons will display rates from the selected service.**
Loan Number	This field is required. Enter the loan number for the requested Service. **NOTE: The loan number is essential because it is what Clients will use to track all requested services made over time.**
Loan Type	This selectable required field is at least one of the loan types needed to be selected: CONVENTIONAL, FHA, VA, UNINSURED, UNKNOWN, PRIV, F40, F01, V01, C40, C21, C01, C04, C41, C83, F03, F05, V40, X01, OTHER.
Mortgagor	This field is required. Enter the name of the borrower on the loan. **CAUTION: The name entered as the Mortgagor is applied to all historical work orders for the loan number that was entered. If a mistake is found on the Mortgagor of a loan number, it will be corrected by IT.**
Address Line 1:	This is a required field. Enter the street address of the property for the work order.
City, State Zip	Enter the required fields: city, state, and zip code of the inspected property. **NOTE: Entering a zip code will automatically populate the city and state fields. A time-saving tip for providing information in these fields is to provide the inspected property's correct zip code.**

NOTE: Use the Save Changes button to submit a work order. It is at the time of Saving Changes that a required field that does not have any data is shown. Placing the mouse pointer over an identified item will indicate what type of information is needed.

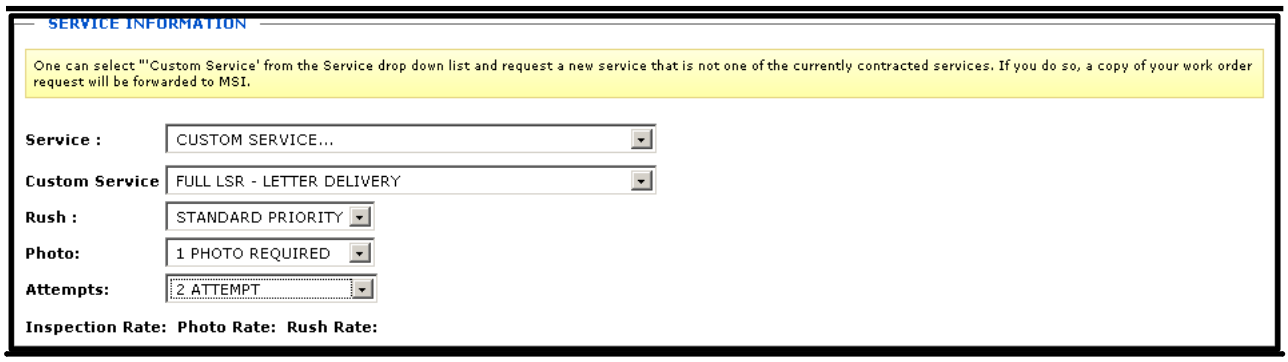
CAUTION: If a required field does not have data, then the work order cannot be created.

After following the link to the Inspection Request Form, select a service to update.



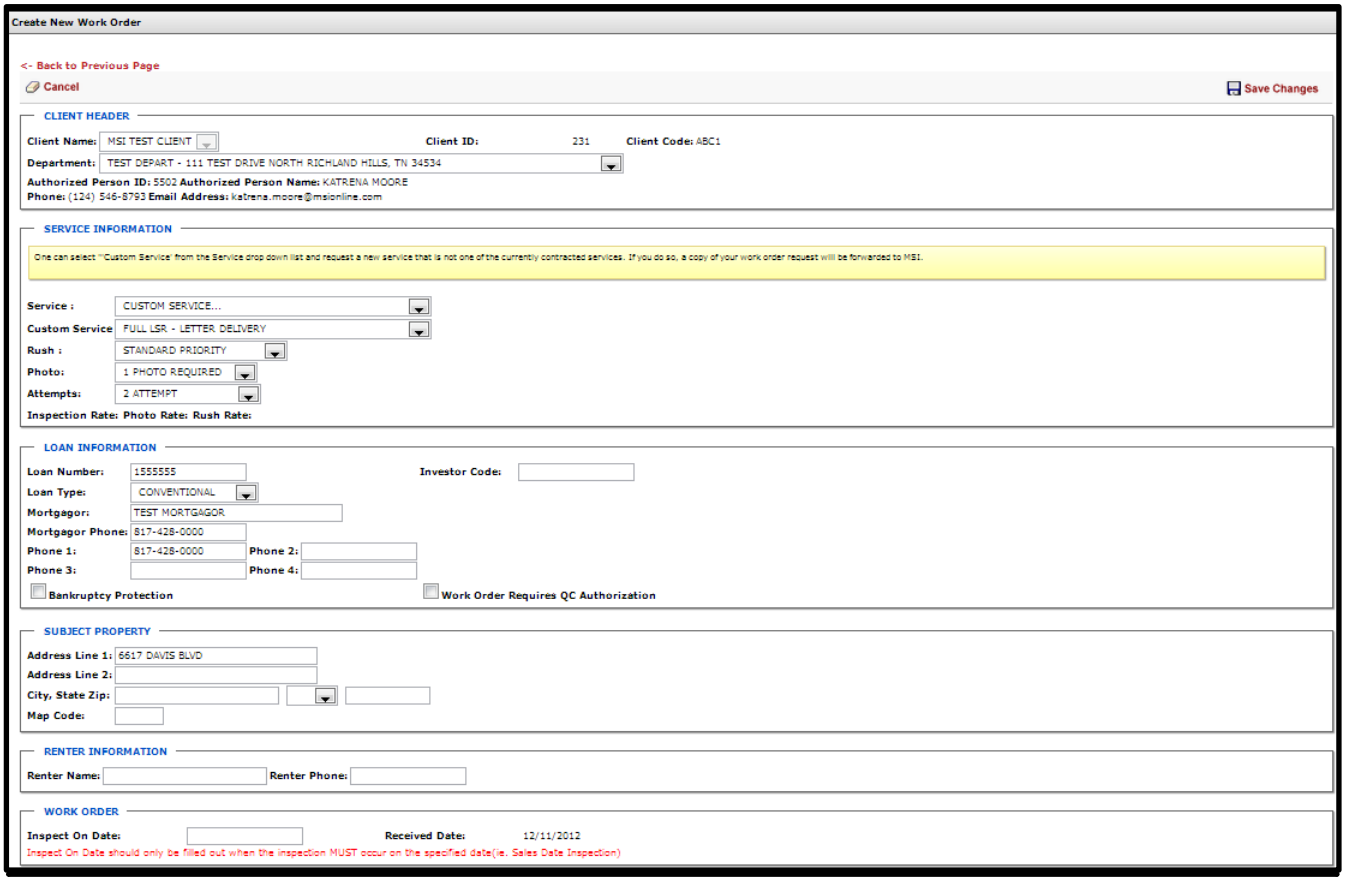

SERVICE INFORMATION
One can select "'Custom Service' from the Service drop down list and request a new service that is not one of the currently contracted services. If you do so, a copy of your work order request will be forwarded to MSI.
Service :
Contracted Services
Selection
ServiceDescription
Priority
Photo
Attempt
Instructions
FULL LOAN SERVICE REPORT
STANDARD PRIORITY
1 PHOTO REQUIRED
1 ATTEMPT
FULL LOAN SERVICE REPORT
STANDARD PRIORITY
1 PHOTO REQUIRED
MONTHLY RECURRING
TESTING RECURRING
PROPERTY INSPECTION
STANDARD PRIORITY
NO PHOTO
1 ATTEMPT
45-DAY LETTER
LOAN INFORMATION
Loan Number:
Investor Code:
Loan Type:
Select a Loan Type
Mortgagor:
Mortgagor Phone:
Phone 1:
Phone 2:
Phone 3:
Phone 4:
Bankruptcy Protection
Work Order Requires QC Authorization
ADDITIONAL INSTRUCTIONS TO FIELD REP (PLEASE GIVE A DETAILED DESCRIPTION FOR EACH REQUESTED TASK.)
Cancel
Place Order

If the service in the drop-down menu is not found, select Custom Service, and use the provided fields to tailor it.



Once updating is complete, click the Save Changes icon in the upper right-hand corner.

NOTE: Fill out the Inspect on Date field only when an inspection occurred on the specified date.



NOTE: If your inspection is created successfully, a green notification is displayed: "New Work Order successfully created."



Client – Preservation Request Form

When a client requests preservation work performed, they can submit a Preservation Request Form. There are many fields on the form; however, the following are the minimum required fields of information to create a work order successfully.

Feature – Required Fields	Description
Loan Number	This is a required field. Enter the loan number on the requested service. **NOTE: The loan number is vital because it is what Clients will use to track all requested services made over time.**
Loan Type	This selectable required field is at least one of the loan types needed to be selected: CONVENTIONAL, FHA, VA, UNINSURED, UNKNOWN, PRIV, F40, F01, V01, C40, C21, C01, C04, C41, C83, F03, F05, V40, X01, OTHER.
Street Address	The selectable field is required. Enter the street address of the requested property.
City, State Zip	The selectable fields are required. Enter the city, state, and zip code of the requested property. **NOTE: Entering a ZIP code will automatically populate the city and state fields. To save time, enter the correct ZIP code for the property.**

NOTE: The Mortgagor field is not a required field; however, this field will automatically populate with the name of the Mortgagor that is on record for the loan.

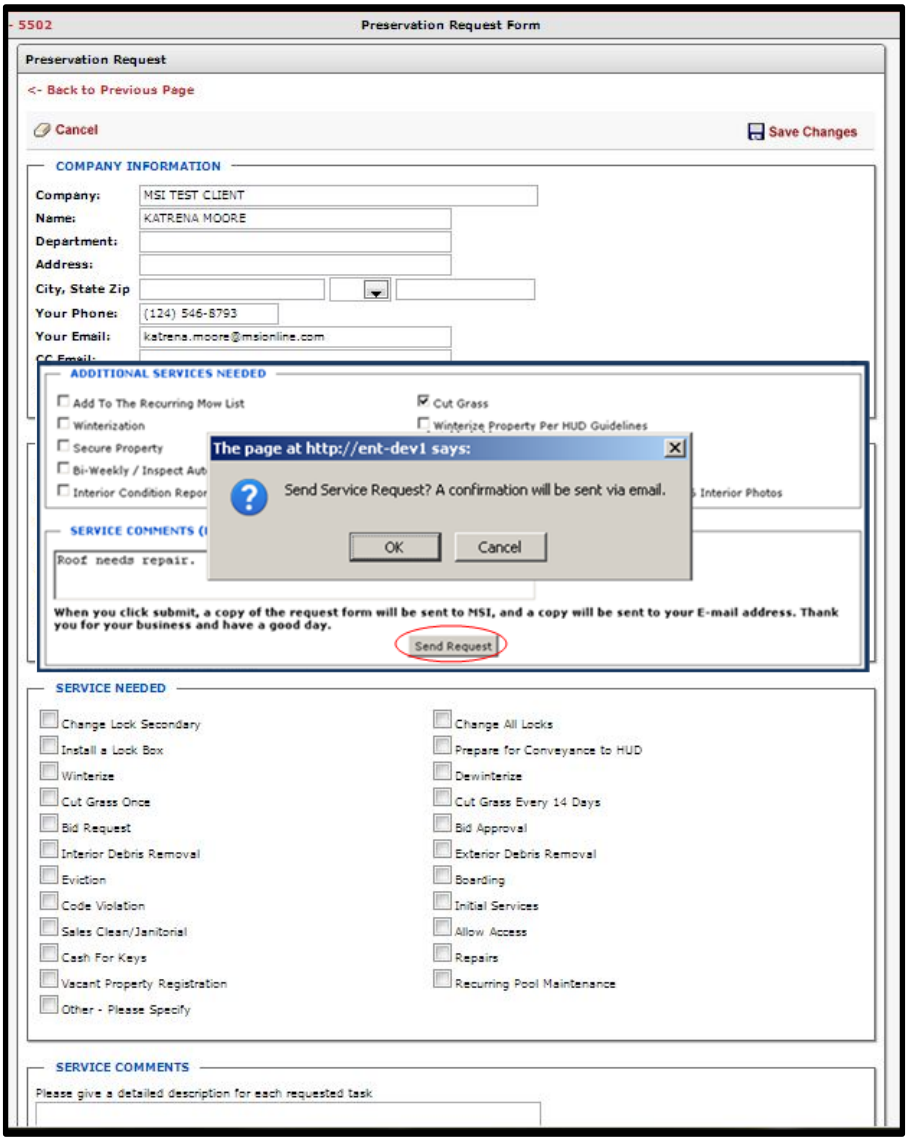
NOTE: Use the Send Request button to submit a work order. At the time of Sending Requests, a required field that does not have any data will show. Placing the mouse pointer over an area that's identified as required will guide what type of information is needed in the field.

NOTE: The Company Information section of this form will retain the previous entry. The Client will receive a confirmation email of the PRESERVATION work order.

CAUTION: If a required field does not have data, then the work order cannot be created.

After following the link "Preservation Request Form," update the work order:

After filling in the relevant fields, click the Send Request button near the bottom of the form.



NOTE: A confirmation email will be sent upon submission.

Client – Loan Search

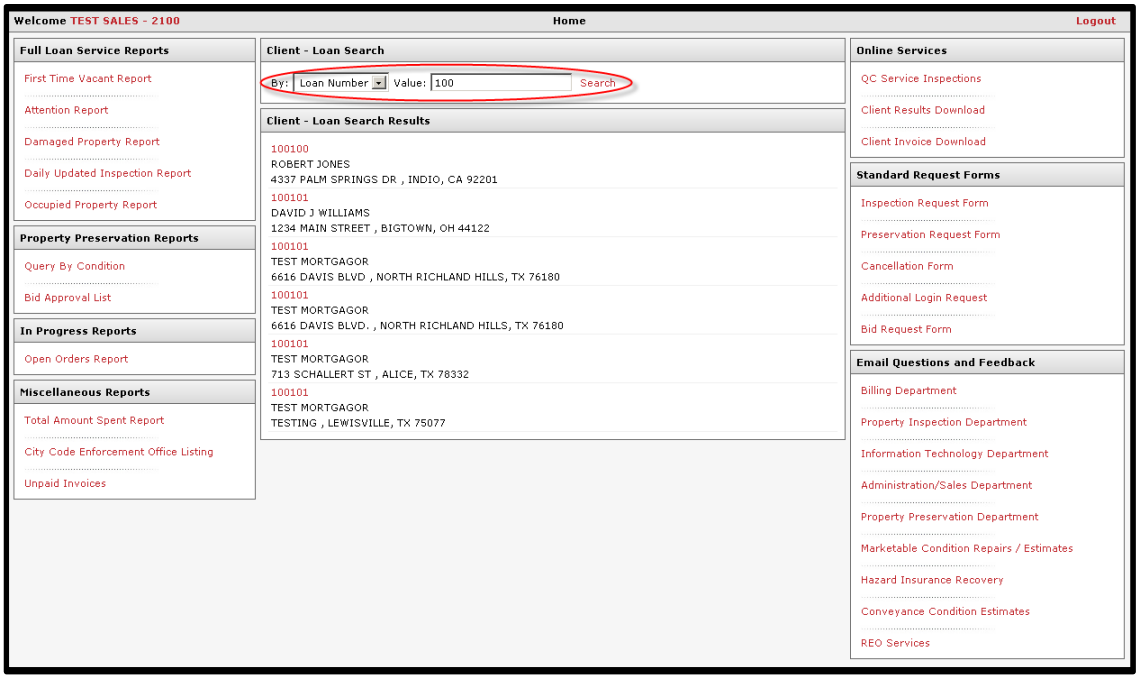
When Clients log in to the website, they can search for information related to a loan. All historical data regarding Full-Service Loan Inspections and Preservation activities can be retrieved for a specific loan. The three ways to search for this Loan information are the following:

Feature – Required Fields	Description
Loan Number	Search by Loan Number accepts a Value that can be an exact or partial Loan Number. For example, if a Loan Number of 0000000001 existed, it would be possible to search for that Loan Number by entering a value of 0000000001, 0, 1, 01, 00, etc. If an exact loan number is NOT used, all loans matching the Value entered will be returned.
Street	Search by Street accepts a Value that can be an exact or partial Street Address. For example, if the Street Address were 713 Away Blvd., it would be possible to search for the Loan Number that has had work done at 713 Away Blvd. If an exact street address is NOT used, then all loans matching the partial street address entered will be returned.
Mortgagor	Search by Mortgagor accepts a Value that can be an exact or partial Mortgagor name. For example, if the Mortgagor were Daffy Duck, it would be possible to search for the Loan Number belonging to Daffy Duck by entering a Value of Daffy Duck, Daffy, Duck, ff, d, y, etc. If an exact Mortgagor name is NOT used, then all loans matching the partial Mortgagor entered will be returned.

The Loan Search is located in the middle frame. Type the relevant criteria, and click Search. Your results will appear below the search box.

NOTE: There are several fields you can search by, all accessible from drop-down menu

NOTE: Searching by a specific Loan Number will produce the timeliest results.

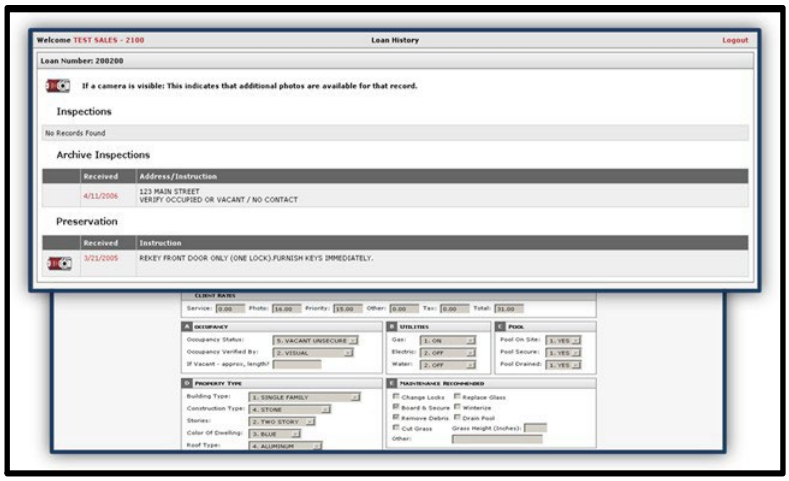


Selecting a loan number will redirect you here, where your sorted results will be placed into three different categories: Inspections, Archive Inspections, and Preservation.

NOTE: The icon indicates there are photos available for the record.

Inspection Order

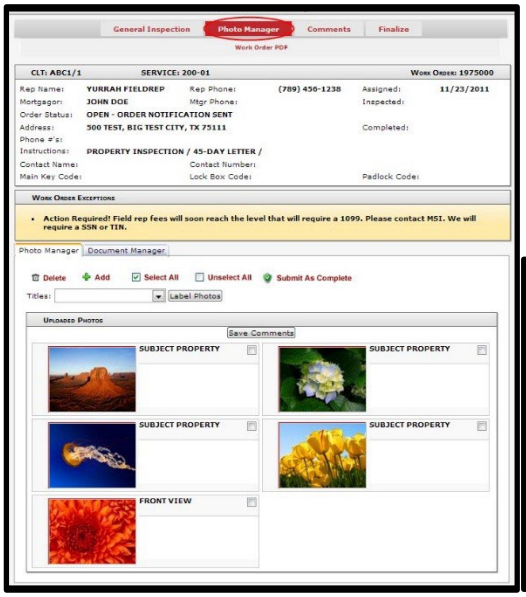
Clicking an **Inspection Order** will take you to the completed PI Form; you can also view the results and invoice PDF. Links to these forms are located just beneath the navigation menu.



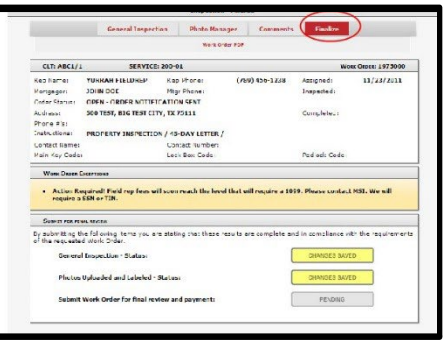
NOTE: Use the Photo Manager tab to view photographs uploaded by the Field Rep.

NOTE: Use the Notifications tab to view comments on the inspection

Notifications are sortable by commentator via the drop-down menu.







Archive Inspection

Clicking an **Archive Inspection** will display the old PI form along with any associated photographs.

Archive Inspection

Loan Number:	100101	Mortgagor:	DAVID J WILLIAMS		
Address:	1234 MAIN STREET BIGTOWN OH 44122				
Client Name:	[redacted] TEST CLIENT	Ordered By:	FORECLOSURE DEPT.		
Instructions:	PROPERTY INSPECTION ONLY				
Loan Type:	FHA	Due Date:	11/01/2003	Fee:	13.00
Received:	04/11/2006	Map Code:	M37	Photo:	2.00
Cancelled:		Occupancy:	VAC/SEC	Rush:	0.00
Complete:	04/13/2006	Condition:	DAMAGED	Other:	0.00
Control:	04/13/2006	Emv:	45000		
Other Desc:				Total:	15.00
Occ verified By:	METER				
Comments:	HOUSE HAS BEEN SECURED. STILL A LOT OF DEBRIS AROUND				
	HOUSE. STILL MANY TIRES IN BACK YARD.				
	testing				
Tenant Name:		Tenant Phone:		Attention:	ATTN
1st Vacant:	N	1st Vac Date:		Stories:	1
Pool/Secure:	N	Structure Color:	WHITE	Elec:	N
Roof type:	COMP	Nbrhood Cond:	STABLE	Card Left:	N
Prop Type:	S/F	Construction type:	FRAME	Water:	N
Mtgr Att:	N/A	Environmental Haz:	YES	Gas:	N
Mail Address:					
Realtor:		Realtor Phone:			
Rep:	01SC	Home Phone:			

MORTGAGOR EMPLOYEMENT INFORMATION

POE:		Income:		Poe Phone:	

CO-MORTGAGOR EMPLOYEMENT INFORMATION

POE:		Income:		Poe Phone:	

PHOTOGRAPHS



FORMS

PDF Adobe RESULTS

NOTE: Download any associated forms by clicking the .pdf link near the bottom of the page.

Preservation Order

Clicking a **Preservation Order** will present the Client with this detailed view of the work order, split into several useful sections.

Preservation Detail

Preservation Detail

Loan Number:	100101	Address:	1234 MAIN STREET, BIGTOWN, OH 44122		
Received:	02/11/2010	Loan Type:	CONV	Rep:	RPC1
Complete:	02/08/2010	Key Code:	76667	Max Allowable:	0.00
Control:	02/08/2010	Photo On File:	1	Condition:	
Winterized:	NO	Winterized Date:			
Order Status:	CLOSED - BILLED				

Instructions

Instructions

General	CONDUCT AN INTERIOR INSPECTION SUBMIT AN EYEBALL ESTIMATE FOR REPAIRS. PERSONAL PROPERTY IS NOT TO BE REMOVED UNDER ANY CIRCUMSTANCES. ONLY HAZARDS THAT POSE AN INFESTATION RISK SUCH AS FOOD, RAW GARBAGE SHOULD BE REMOVED. EXTERIOR DEBRIS THAT CONSISTS OF LIMBS, TRASH, SHRUBBERY SHOULD BE REMOVED . HAZARDS AND EXTERIOR DEBRIS COMBINED ALLOWABLE IS $250.00 COMPLETE AN INITIAL GRASS CUT IF NEEDED UP TO $125.00. WATER MITIGATION IS PRE APPROVED UP TO $600 THIS INCLUDES BUT IS NOT LIMITED TO THE USE OF A DEHUMIDIFIER, PUMPING AND OTHER LEAK OR WATER ISSUES THAT POSE AN IMMEDIATE THREAT TO THE INTEGRITY OF THE PROPERTY BID ALL OTHER ISSUES
Key	REKEY SECONDARY DOOR ONLY TO 76667 ***INSTALL LOCKBOX SET TO ***LIT*** LEAVE ONE KEY IN LOCKBOX*** MAKE SURE ALL OTHER WINDOWS AND DOORS ARE SECURE.***PLEASE NOTE THAT THE REKEY OF THIS PROPERTY SHOULD ONLY BE COMPLETED IF THE PROPERTY IS INDEED VACANT AND THERE IS NOT AN ACTIVE LISTING. IF YOU ARE UNABLE TO CONFIRM LISTING STATUS THEN PROCEED WITH REKEYING A SECONDARY DOOR. IF THERE IS NOT A SECONDARY DOOR THEN REKEY THE FRONT...BUT ONLY IF THERE IS NOT A SECONDARY DOOR.
Winterization	** ** WINTERIZE ALSO **PER FHA/HUD REGULATIONS.
Photo	PROVIDE BEFORE AND AFTER PHOTOS TO JUSTIFY ALL WORK PERFORMED, DAMAGES, AND/OR TO JUSTIFY BID. A FULL VEIW OF SUBJECT PROPERTY ALSO INCLUDE A FULL VEIW OF THE MAIN LIVING AREA, KITCHEN MASTER BEDROOM, MASTER BATH AND SECONDARY BATHROOM IF APPLICABLE AND ONE EACH OF FRONT, BACK, AND BOTH SIDES. ALL PHOTOS ARE REQUIRED BUT WILL NOT BE PAID

Comments

Comments

Time Added	Comment
2/11/2010 1:55:06 PM	PLEASE REVIEW BID ITEMS FOR APPROVAL.
2/11/2010 1:54:23 PM	2-8-2010 THE FIELD REP REPORTED THAT THE PROPERTY HAS EXTENSIVE DAMAGE. IT APPEARS THAT SOMEONE MAY HAVE STARTED REMODELING THE HOME BUT NEVER FINISHED:ALL THE PLUMBING AND ELECTRICAL HAS BEEN REMOVED.MOST OF THE FLOORING ON THE SECOND STORY HAS BEEN REMOVED AND THE ROOF IS IN BAD SHAPE AND IS UNSAFE TO WALK ON.THE FIELD REP ALSO STATED THAT THE PROPERTY APPEARS TO BE STRUCTUALLY UNSOUND.NO WORK WAS COMPLETED AT THE TIME OF THE VISIT BID SUBMITTED ONLY.THE EYEBALL ESTIMATE OF DAMAGES IS $65,000.00 INCLUDING A NEW.IF REPAIRS TO THIS ORDER ARE BEING CONSIDERED MSI CAN ARRANGE TO OBTAIN BIDS FROM A LICENSED ELECTRICIAN,PLUMBING AND STRUCTUAL CONTRACTORS.

Bid Items

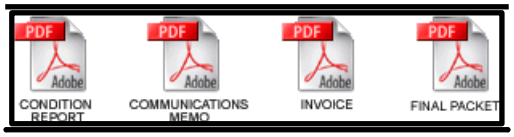
Bid Items				
ITEM	SERVICE DESCRIPTION	QTY	RATE	TOTAL
1.	INTERIOR HAZARD - REMOVE MOLDY PLYWOOD THROUGHOUT	1	$450.00	$450.00
2.	INTERIOR DEBRIS - REMOVE 6 CUBIC YARDS TO INCLUDE TRASH AND BUILDING MATERIALS	6	$55.00	$330.00
3.	BOARDING - BOARD 3 DOORS 48X84 AND THEN COMPLETE LOCK CHANGE	3	$105.06	$315.18
4.	BOARDING - BOARD 3 WINDOWS 40X67	3	$85.60	$256.80
5.	EXTERIOR DEBRIS - REMOVE 1CUBIC YARD-TRASH/BAGS/MISC	1	$55.00	$55.00
6.	OTHER DAMAGE - INSTALL CEILINGS THROUGHOUT	1	$4,000.00	$4,000.00
7.	OTHER DAMAGE - REPAIR/REPLACE ALL ELECTRICAL AND PANELS THROUGHOUT ENTIRE HOUSE	1	$8,500.00	$8,500.00
8.	OTHER DAMAGE - REPAIR/REPLACE ALL PLUMBING THROUGHOUT AND INSTALL FIXTURES	1	$6,200.00	$6,200.00
9.	OTHER DAMAGE - REPAIR/REPLACE ALL SUBFLOORING,DRYWALL,CEILINGS,SPACKLE AND PAINT	1	$18,000.00	$18,000.00
10.	OTHER DAMAGE - REPLACE ALL RADIATORS THROUGHOUT ONCE PLUMBING AND ELECTRICAL HAS BEEN INSTALLED	1	$8,000.00	$8,000.00
11.	OTHER - INSTALL 5FEET HANDRAILS INSIDE AND OUT FOR SAFETY	1	$500.00	$500.00
12.	OTHER DAMAGE - INSTALL NEW A/C UNIT	1	$9,250.00	$9,250.00
13.	INTERIOR HAZARD - REMOVE 6GAL PAINT	6	$10.00	$60.00

Billing Items

Billing Items				
ITEM	SERVICE DESCRIPTION	QTY	RATE	TOTAL
1.	TRIP CHARGE-TO OBTAIN BID	1	$40.00	$40.00

Tax Rate:		Invoice Number:	1258875	Sub Total:	40.00
		Invoice Date:	02/15/2010	Tax Amt:	0.00
				Total:	40.00

Forms



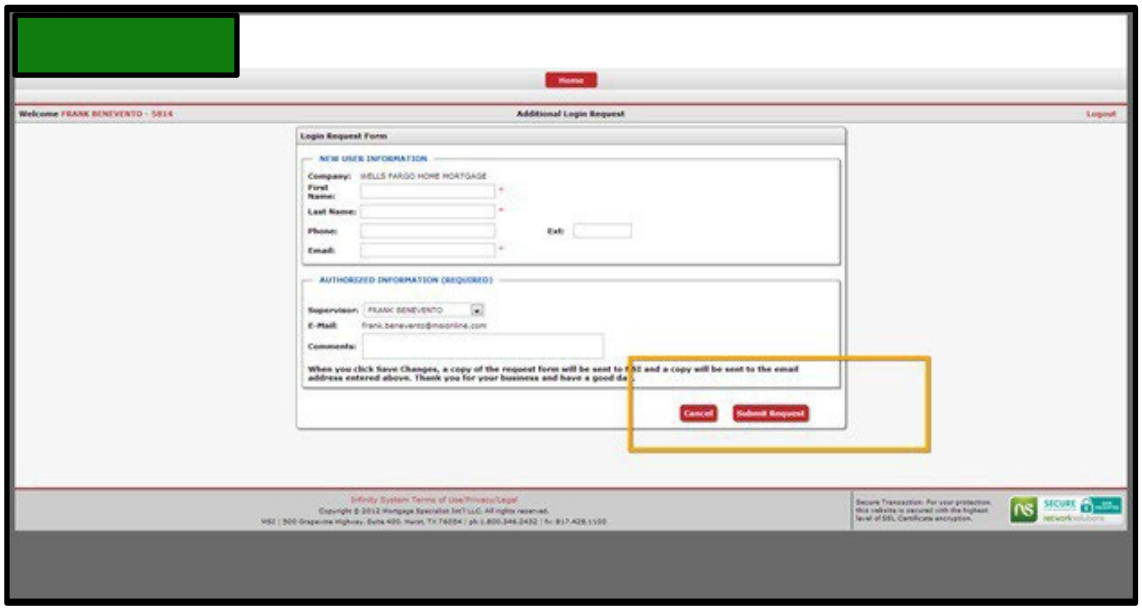
Photographs



Client – Additional Login Request Form

When a Client requires that someone be added to their account, they can use the **Additional Login Request Form.**

Feature – Required Fields	**Description**
First Name	This field is required. IT needs this information to set up a new user's account.
Last Name	This field is required. IT needs this information to set up a new user's account.
Email	This field is required. This email will be linked to the new user's account.
Supervisor	This field is a dropdown menu where the Client can select who is making the request.
Comments	Although this field is not required, it can help expedite your request.





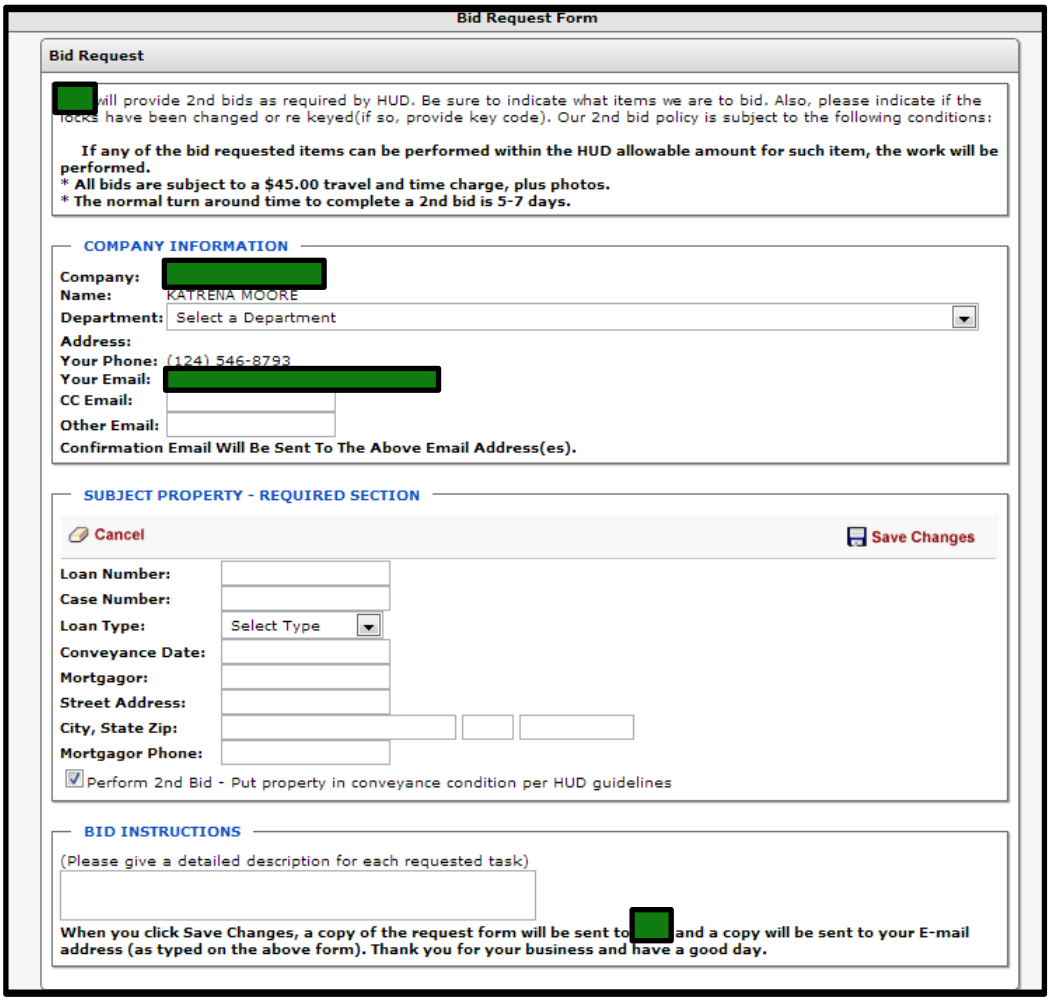
Once all required fields have been filled out, select Submit Request. the Client should receive an email confirmation.

Client – Bid Request Form

When a Client needs to request a second bid for a loan number, they must use the Bid Request Form.

Form.

Feature – Required Fields	Description
Department	This is a required field. This field is a selectable list.
Loan Number	This is a required field.
Case Number	This is a required field.
Loan Type	This is a required field. This field is a selectable list.
Conveyance Date	This is a required field. This field requires a MM/DD/YYYY format.
Mortgagor	This is a required field.
Street Address	This is a required field.
City, State, Zip	This is a required field.
Mortgagor Phone	This is a required field.



Client – Cancellation Form

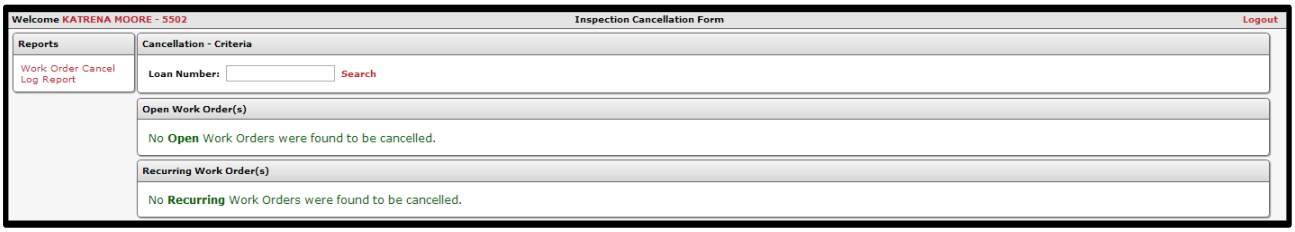
Clients may cancel INSPECTION work orders at their discretion. The Cancellation Form will display work orders that are currently open for a loan number.

Feature – Required Fields	Description
Reason	This field is required. A work order cannot be canceled without providing a reason.
Cancel check box	This is a required check box. The box next to the desired work order to be canceled must be checked.

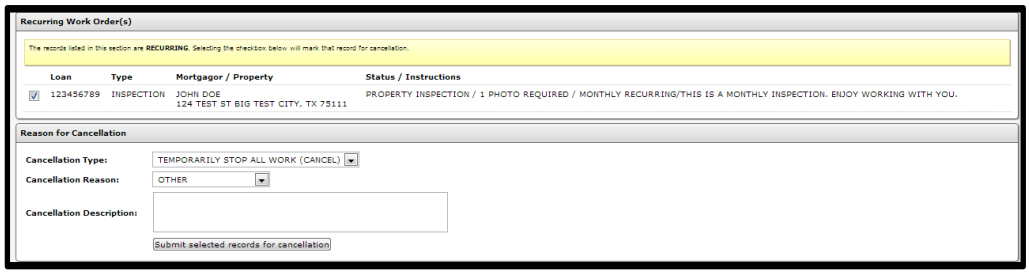
NOTE: The loan number must be entered before being able to cancel a work order.

CAUTION: When a work order is canceled, the Field Rep will receive an email notifying them that there are 24 hours before the system automatically closes the work order. If the Field Rep returns a work order within 24 hours, they will be paid and the Client will be charged the regular service fees. If the Field Rep does not return a work order within 24 hours, they will not be paid and the Client will be charged only a cancellation fee.

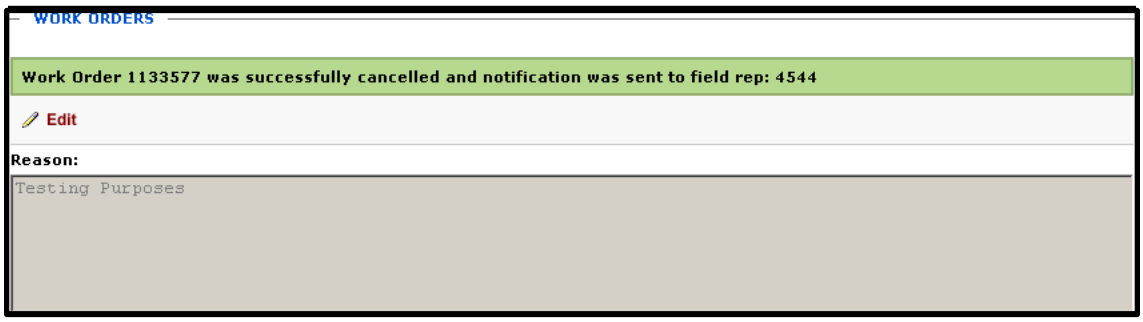
Go to the Cancellation Form and type the relevant Loan Number into the search box.



If there is a record for your query, it will be displayed beneath the search in a few moments.



Once all required fields are filled, ice the green notification confirming the submission.

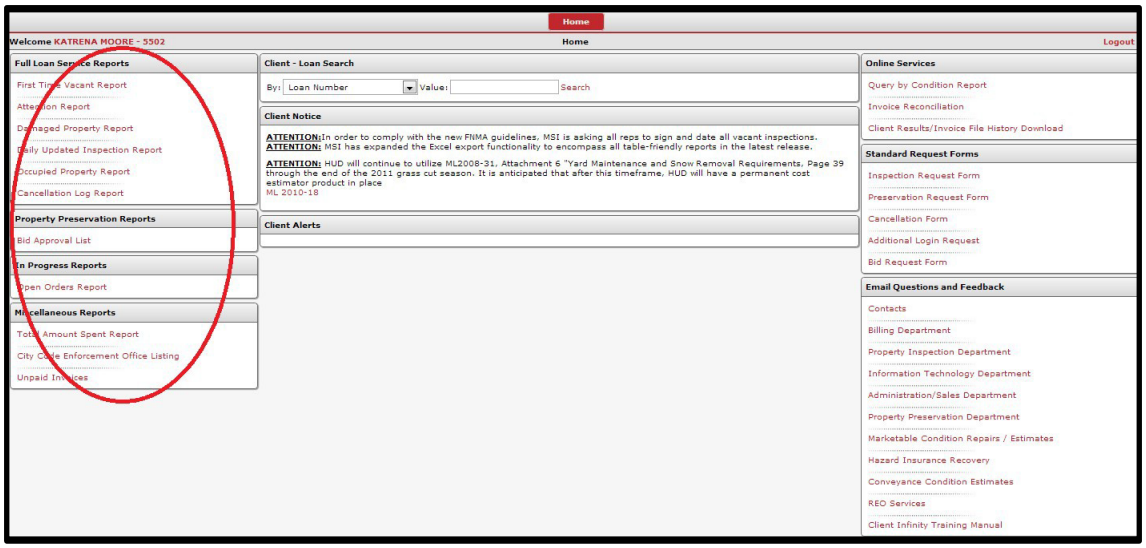


Client – Reports

All reports are accessible from the left frame of your home page and are organized into **Full Loan Service, Property Preservation, In Progress,** and **Miscellaneous**.

NOTE: Reports include the option of dumping to Excel - this will only be illustrated in the Total Amount Spent Report section as this feature is consistent across all reports.

NOTE: All date input fields require the MM/DD/YYYY format

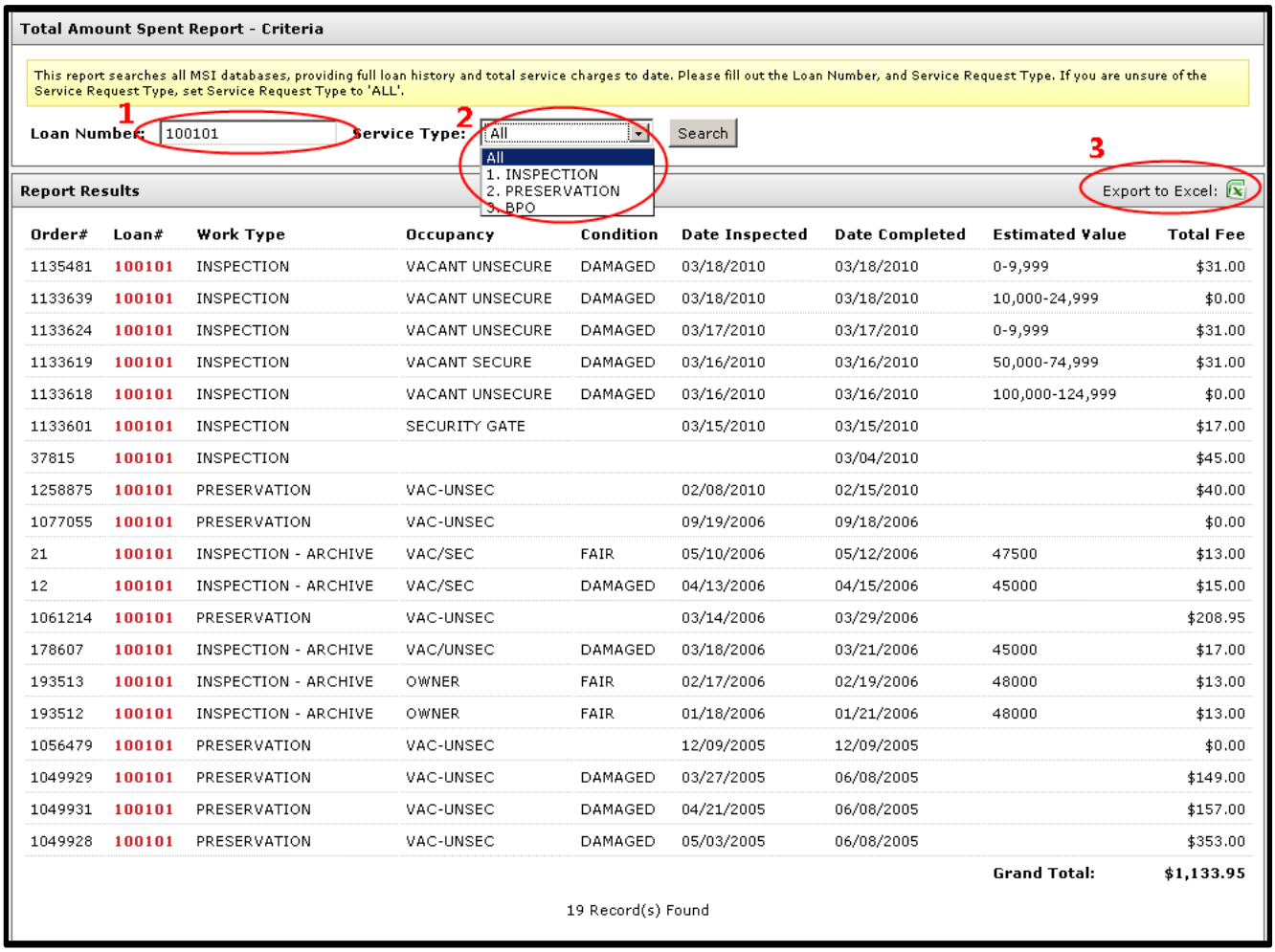


Total Amount Spent Report

This report will provide a full history of the loan number queried, including total charges to date. It can be found under **Miscellaneous Reports**.

1. Type in the appropriate loan number.
2. Select a **Service Type,** or use the default **'All'** to display every available result
3. Results can then be exported to an Excel worksheet.

NOTE: Individual work orders can be selected to view their details.

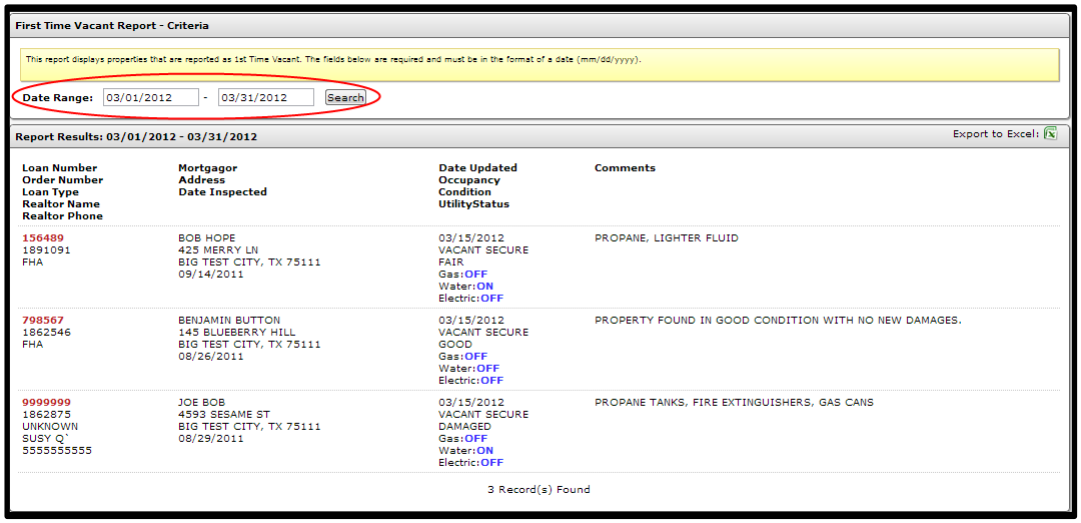


Order#	Loan#	Work Type	Occupancy	Condition	Date Inspected	Date Completed	Estimated Value	Total Fee
1135481	100101	INSPECTION	VACANT UNSECURE	DAMAGED	03/18/2010	03/18/2010	0-9,999	$31.00
1133639	100101	INSPECTION	VACANT UNSECURE	DAMAGED	03/18/2010	03/18/2010	10,000-24,999	$0.00
1133624	100101	INSPECTION	VACANT UNSECURE	DAMAGED	03/17/2010	03/17/2010	0-9,999	$31.00
1133619	100101	INSPECTION	VACANT SECURE	DAMAGED	03/16/2010	03/16/2010	50,000-74,999	$31.00
1133618	100101	INSPECTION	VACANT UNSECURE	DAMAGED	03/16/2010	03/16/2010	100,000-124,999	$0.00
1133601	100101	INSPECTION	SECURITY GATE		03/15/2010	03/15/2010		$17.00
37815	100101	INSPECTION				03/04/2010		$45.00
1258875	100101	PRESERVATION	VAC-UNSEC		02/08/2010	02/15/2010		$40.00
1077055	100101	PRESERVATION	VAC-UNSEC		09/19/2006	09/18/2006		$0.00
21	100101	INSPECTION - ARCHIVE	VAC/SEC	FAIR	05/10/2006	05/12/2006	47500	$13.00
12	100101	INSPECTION - ARCHIVE	VAC/SEC	DAMAGED	04/13/2006	04/15/2006	45000	$15.00
1061214	100101	PRESERVATION	VAC-UNSEC		03/14/2006	03/29/2006		$208.95
178607	100101	INSPECTION - ARCHIVE	VAC/UNSEC	DAMAGED	03/18/2006	03/21/2006	45000	$17.00
193513	100101	INSPECTION - ARCHIVE	OWNER	FAIR	02/17/2006	02/19/2006	48000	$13.00
193512	100101	INSPECTION - ARCHIVE	OWNER	FAIR	01/18/2006	01/21/2006	48000	$13.00
1056479	100101	PRESERVATION	VAC-UNSEC		12/09/2005	12/09/2005		$0.00
1049929	100101	PRESERVATION	VAC-UNSEC	DAMAGED	03/27/2005	06/08/2005		$149.00
1049931	100101	PRESERVATION	VAC-UNSEC	DAMAGED	04/21/2005	06/08/2005		$157.00
1049928	100101	PRESERVATION	VAC-UNSEC	DAMAGED	05/03/2005	06/08/2005		$353.00
							Grand Total:	**$1,133.95**

19 Record(s) Found

First Time Vacant Report

This report displays properties reported as First Time Vacant during the specified date range. It can be found under **Full Loan Service Reports**.



First Time Vacant Report - Criteria

This report displays properties that are reported as 1st Time Vacant. The fields below are required and must be in the format of a date (mm/dd/yyyy).

Date Range: 03/01/2012 - 03/31/2012 Search

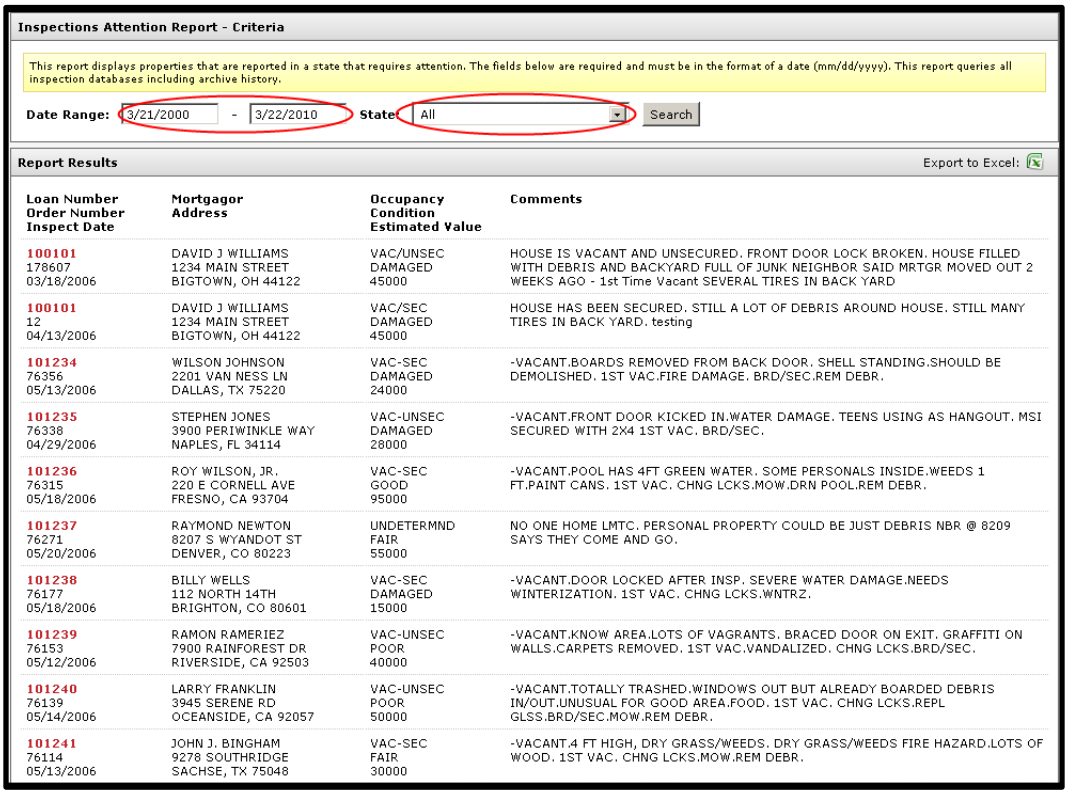
Report Results: 03/01/2012 - 03/31/2012 Export to Excel:

Loan Number Order Number Loan Type Realtor Name Realtor Phone	Mortgagor Address Date Inspected	Date Updated Occupancy Condition UtilityStatus	Comments
156489 1891091 FHA	BOB HOPE 425 MERRY LN BIG TEST CITY, TX 75111 09/14/2011	03/15/2012 VACANT SECURE FAIR Gas:OFF Water:ON Electric:OFF	PROPANE, LIGHTER FLUID
798567 1862546 FHA	BENJAMIN BUTTON 145 BLUEBERRY HILL BIG TEST CITY, TX 75111 08/26/2011	03/15/2012 VACANT SECURE GOOD Gas:OFF Water:OFF Electric:OFF	PROPERTY FOUND IN GOOD CONDITION WITH NO NEW DAMAGES.
9999999 1862875 UNKNOWN SUSY Q` 5555555555	JOE BOB 4593 SESAME ST BIG TEST CITY, TX 75111 08/29/2011	03/15/2012 VACANT SECURE DAMAGED Gas:OFF Water:ON Electric:OFF	PROPANE TANKS, FIRE EXTINGUISHERS, GAS CANS

3 Record(s) Found

Attention Report - LSR

This report displays properties that require attention and is sortable by state. Each result provides some summary data regarding the inspection. It can be found under **Full Loan Service Reports.**



Inspections Attention Report - Criteria

This report displays properties that are reported in a state that requires attention. The fields below are required and must be in the format of a date (mm/dd/yyyy). This report queries all inspection databases including archive history.

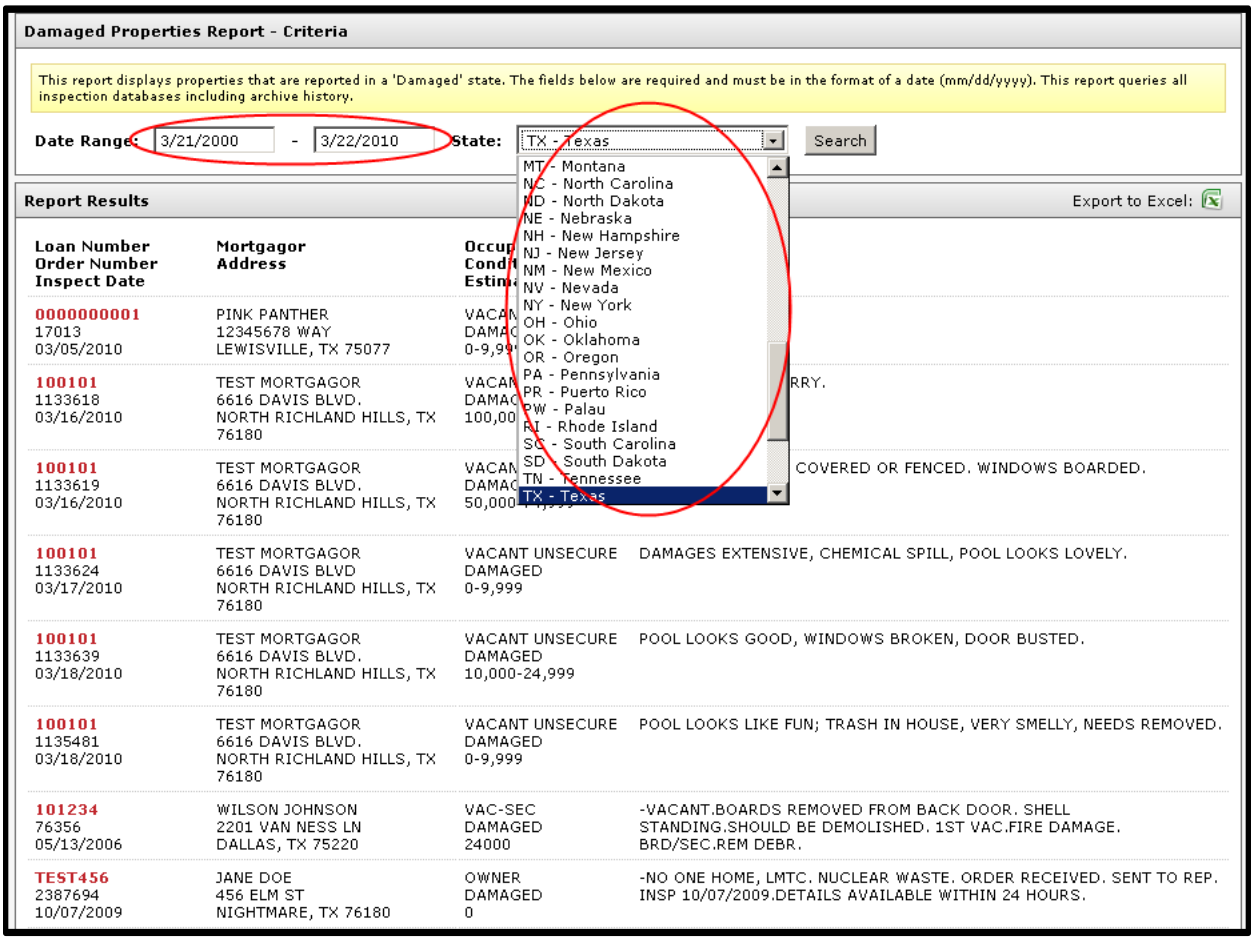
Date Range: 3/21/2000 - 3/22/2010 State: All Search

Report Results Export to Excel:

Loan Number Order Number Inspect Date	Mortgagor Address	Occupancy Condition Estimated Value	Comments
100101 178607 03/18/2006	DAVID J WILLIAMS 1234 MAIN STREET BIGTOWN, OH 44122	VAC/UNSEC DAMAGED 45000	HOUSE IS VACANT AND UNSECURED. FRONT DOOR LOCK BROKEN. HOUSE FILLED WITH DEBRIS AND BACKYARD FULL OF JUNK NEIGHBOR SAID MRTGR MOVED OUT 2 WEEKS AGO - 1st Time Vacant SEVERAL TIRES IN BACK YARD
100101 12 04/13/2006	DAVID J WILLIAMS 1234 MAIN STREET BIGTOWN, OH 44122	VAC/SEC DAMAGED 45000	HOUSE HAS BEEN SECURED. STILL A LOT OF DEBRIS AROUND HOUSE. STILL MANY TIRES IN BACK YARD. testing
101234 76356 05/13/2006	WILSON JOHNSON 2201 VAN NESS LN DALLAS, TX 75220	VAC-SEC DAMAGED 24000	-VACANT.BOARDS REMOVED FROM BACK DOOR. SHELL STANDING.SHOULD BE DEMOLISHED. 1ST VAC.FIRE DAMAGE. BRD/SEC.REM DEBR.
101235 76338 04/29/2006	STEPHEN JONES 3900 PERIWINKLE WAY NAPLES, FL 34114	VAC-UNSEC DAMAGED 28000	-VACANT.FRONT DOOR KICKED IN.WATER DAMAGE. TEENS USING AS HANGOUT. MSI SECURED WITH 2X4 1ST VAC. BRD/SEC.
101236 76315 05/18/2006	ROY WILSON, JR. 220 E CORNELL AVE FRESNO, CA 93704	VAC-SEC GOOD 95000	-VACANT.POOL HAS 4FT GREEN WATER. SOME PERSONALS INSIDE.WEEDS 1 FT.PAINT CANS. 1ST VAC. CHNG LCKS.MOW.DRN POOL.REM DEBR.
101237 76271 05/20/2006	RAYMOND NEWTON 8207 S WYANDOT ST DENVER, CO 80223	UNDETERMND FAIR 55000	NO ONE HOME LMTC. PERSONAL PROPERTY COULD BE JUST DEBRIS NBR @ 8209 SAYS THEY COME AND GO.
101238 76177 05/18/2006	BILLY WELLS 112 NORTH 14TH BRIGHTON, CO 80601	VAC-SEC DAMAGED 15000	-VACANT.DOOR LOCKED AFTER INSP. SEVERE WATER DAMAGE.NEEDS WINTERIZATION. 1ST VAC. CHNG LCKS.WNTRZ.
101239 76153 05/12/2006	RAMON RAMERIEZ 7900 RAINFOREST DR RIVERSIDE, CA 92503	VAC-UNSEC POOR 40000	-VACANT.KNOW AREA.LOTS OF VAGRANTS. BRACED DOOR ON EXIT. GRAFFITI ON WALLS.CARPETS REMOVED. 1ST VAC.VANDALIZED. CHNG LCKS.BRD/SEC.
101240 76139 05/14/2006	LARRY FRANKLIN 3945 SERENE RD OCEANSIDE, CA 92057	VAC-UNSEC POOR 50000	-VACANT.TOTALLY TRASHED.WINDOWS OUT BUT ALREADY BOARDED DEBRIS IN/OUT.UNUSUAL FOR GOOD AREA.FOOD. 1ST VAC. CHNG LCKS.REPL GLSS.BRD/SEC.MOW.REM DEBR.
101241 76114 05/13/2006	JOHN J. BINGHAM 9278 SOUTHRIDGE SACHSE, TX 75048	VAC-SEC FAIR 30000	-VACANT.4 FT HIGH, DRY GRASS/WEEDS. DRY GRASS/WEEDS FIRE HAZARD.LOTS OF WOOD. 1ST VAC. CHNG LCKS.MOW.REM DEBR.

Damaged Property Report

This report will display any property which has been flagged as **Damaged.** Select a state from the drop-down menu to narrow the results. It can be found under **Full Loan Service Reports.**

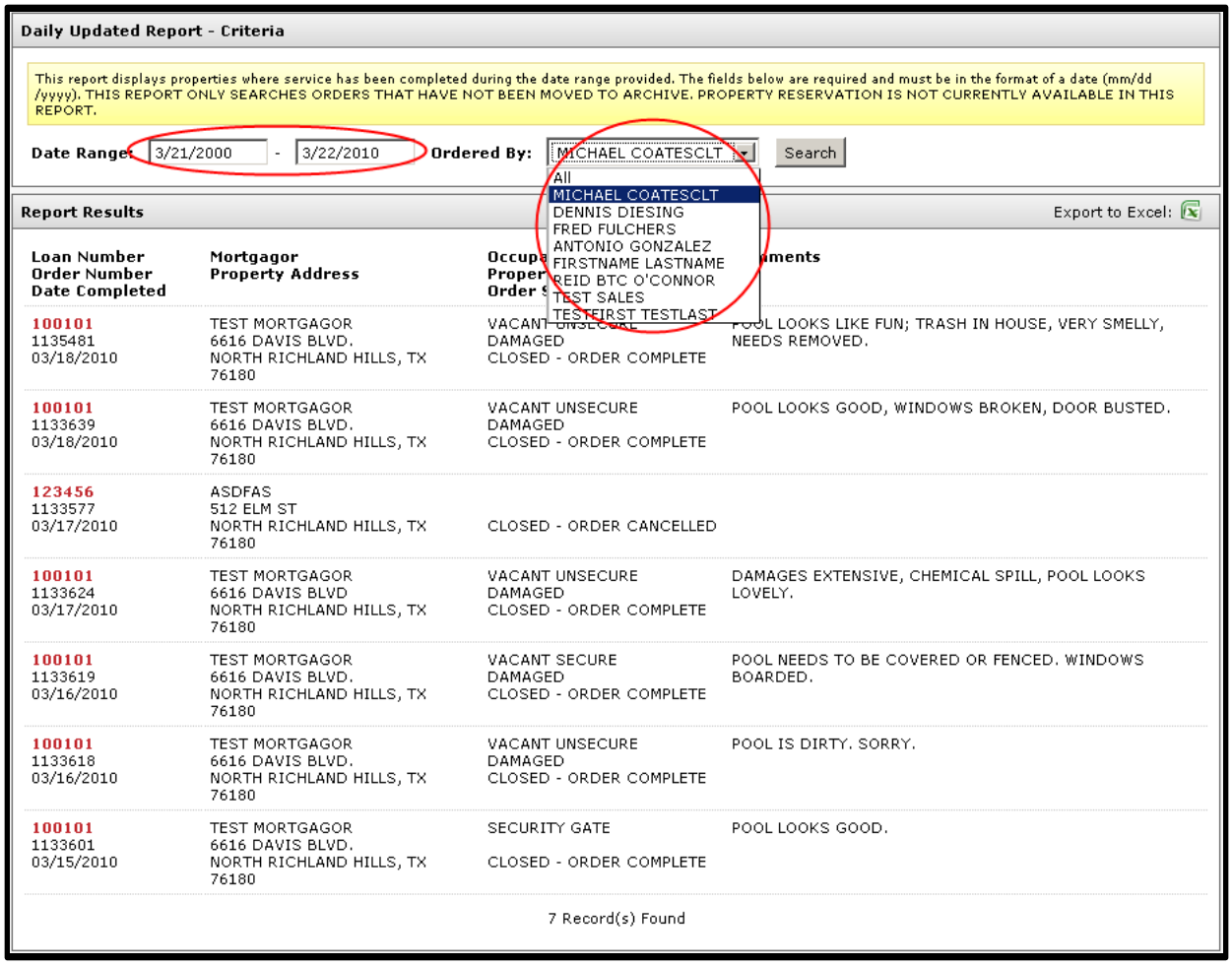


Daily Updated Inspection Report

This report displays properties where service has been completed during the date range provided. Results can be filtered by who placed the order. It can be found under **Full Loan Service Reports.**

NOTE: This report only searches orders that have not been moved to the archive.

NOTE: This report will only display Inspections.

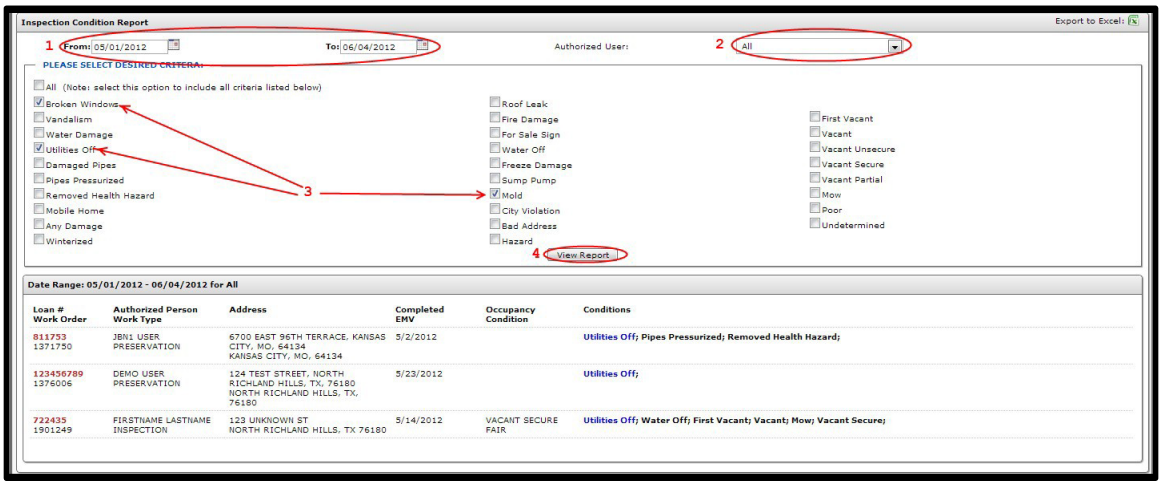


Query by Condition Report

This report allows you to select multiple conditions and a date range to find properties that match your criteria. An Authorized Person can also filter the report. It can be found under Property Preservation Reports:

1. Fill in the relevant date range
2. Select an authorized person or keep the default all for overall results.
3. Use the checkboxes to select appropriate conditions.
4. Click View Report and results will be displayed immediately below.





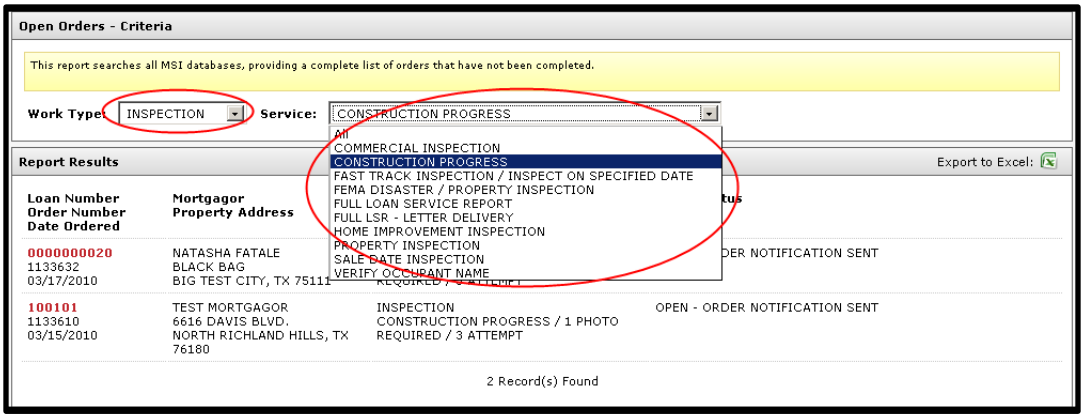
NOTE: For each record found, queried conditions is highlighted in Blue.

NOTE: The results will include work orders which match any of the specified criteria.

Open Orders Report

This report will pull a comprehensive list of orders that have not been completed and can be sorted by **Work Type** (Inspection/Preservation/BPO) as well as by **Service Type**. It can be found under **In Progress Reports**

NOTE: Below, you can see the input required to generate a Construction Progress Report. We found that this method is much more flexible and allows for any number of customized queries.

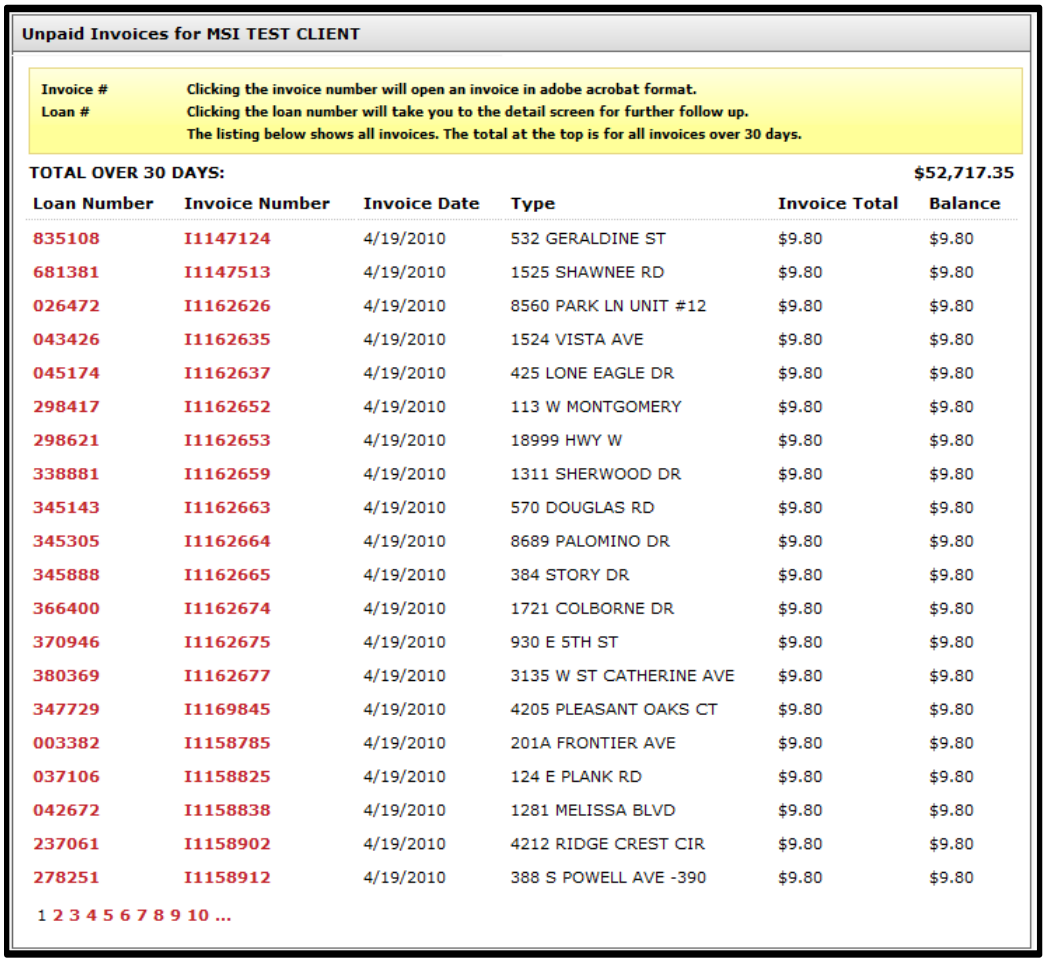


Unpaid Invoices Report

This report will display a listing of Unpaid Invoices over the past 30 days. Links are provided for review of Loan History and individual Invoices.

NOTE: This report is updated daily; therefore, depending upon activity information in this report may change daily.

NOTE: Multiple pages of Unpaid Invoices may exist. Use the pagination links located at the bottom of the report to navigate to additional pages of information.



Unpaid Invoices for MSI TEST CLIENT

Invoice # Clicking the invoice number will open an invoice in adobe acrobat format.
Loan # Clicking the loan number will take you to the detail screen for further follow up.
The listing below shows all invoices. The total at the top is for all invoices over 30 days.

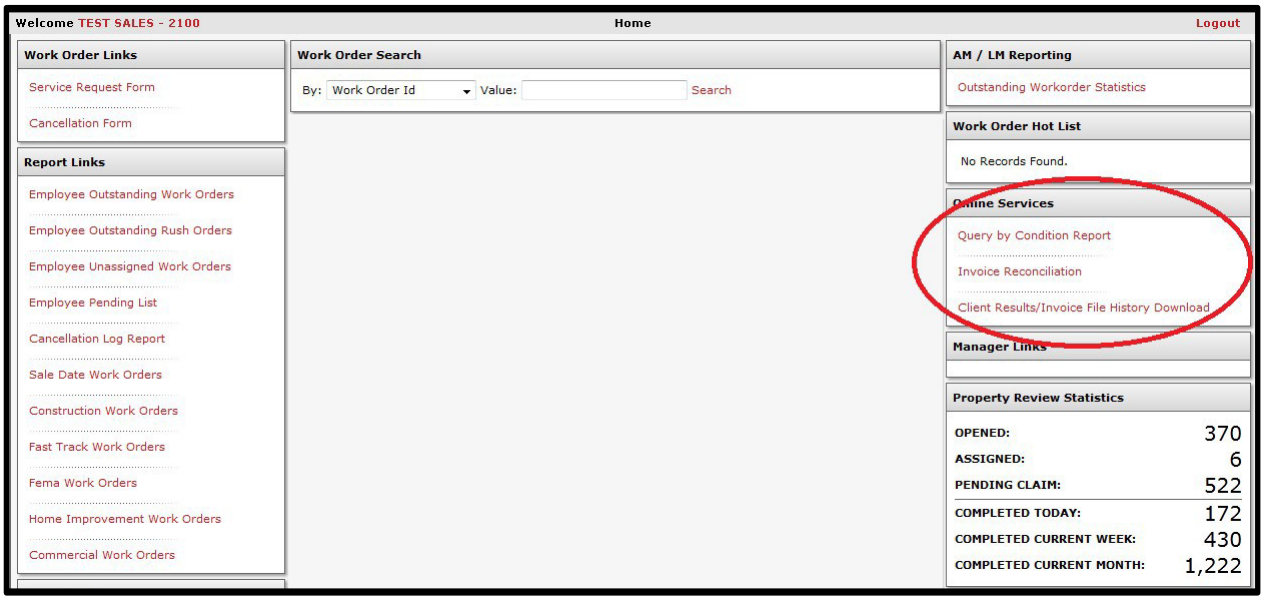
TOTAL OVER 30 DAYS: **$52,717.35**

Loan Number	Invoice Number	Invoice Date	Type	Invoice Total	Balance
835108	I1147124	4/19/2010	532 GERALDINE ST	$9.80	$9.80
681381	I1147513	4/19/2010	1525 SHAWNEE RD	$9.80	$9.80
026472	I1162626	4/19/2010	8560 PARK LN UNIT #12	$9.80	$9.80
043426	I1162635	4/19/2010	1524 VISTA AVE	$9.80	$9.80
045174	I1162637	4/19/2010	425 LONE EAGLE DR	$9.80	$9.80
298417	I1162652	4/19/2010	113 W MONTGOMERY	$9.80	$9.80
298621	I1162653	4/19/2010	18999 HWY W	$9.80	$9.80
338881	I1162659	4/19/2010	1311 SHERWOOD DR	$9.80	$9.80
345143	I1162663	4/19/2010	570 DOUGLAS RD	$9.80	$9.80
345305	I1162664	4/19/2010	8689 PALOMINO DR	$9.80	$9.80
345888	I1162665	4/19/2010	384 STORY DR	$9.80	$9.80
366400	I1162674	4/19/2010	1721 COLBORNE DR	$9.80	$9.80
370946	I1162675	4/19/2010	930 E 5TH ST	$9.80	$9.80
380369	I1162677	4/19/2010	3135 W ST CATHERINE AVE	$9.80	$9.80
347729	I1169845	4/19/2010	4205 PLEASANT OAKS CT	$9.80	$9.80
003382	I1158785	4/19/2010	201A FRONTIER AVE	$9.80	$9.80
037106	I1158825	4/19/2010	124 E PLANK RD	$9.80	$9.80
042672	I1158838	4/19/2010	1281 MELISSA BLVD	$9.80	$9.80
237061	I1158902	4/19/2010	4212 RIDGE CREST CIR	$9.80	$9.80
278251	I1158912	4/19/2010	388 S POWELL AVE -390	$9.80	$9.80

1 2 3 4 5 6 7 8 9 10 ...

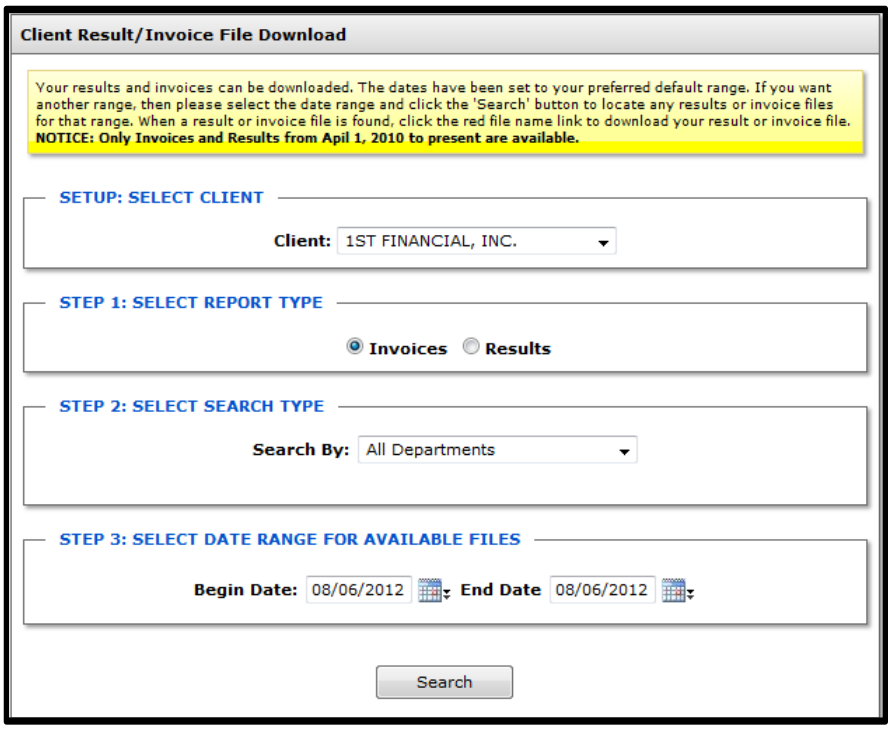
Client – Online Services

The features detailed below can be found in the top-right frame of your home page.



Client Results/Invoice File History Download

This page can create a download file of your results from several different criteria Client, Report Type, Search Type, and Date range. Once you have selected a search parameter, click the icon for Search.



Results will be populated and available for download.

Field Rep Features

Areas covered in this section:

- Field Rep-Downloading Available Work
- Field Rep-Updating an Inspection Form
- Field Rep-Checking the Status of a Work Order
- Field Rep-Work Order Search

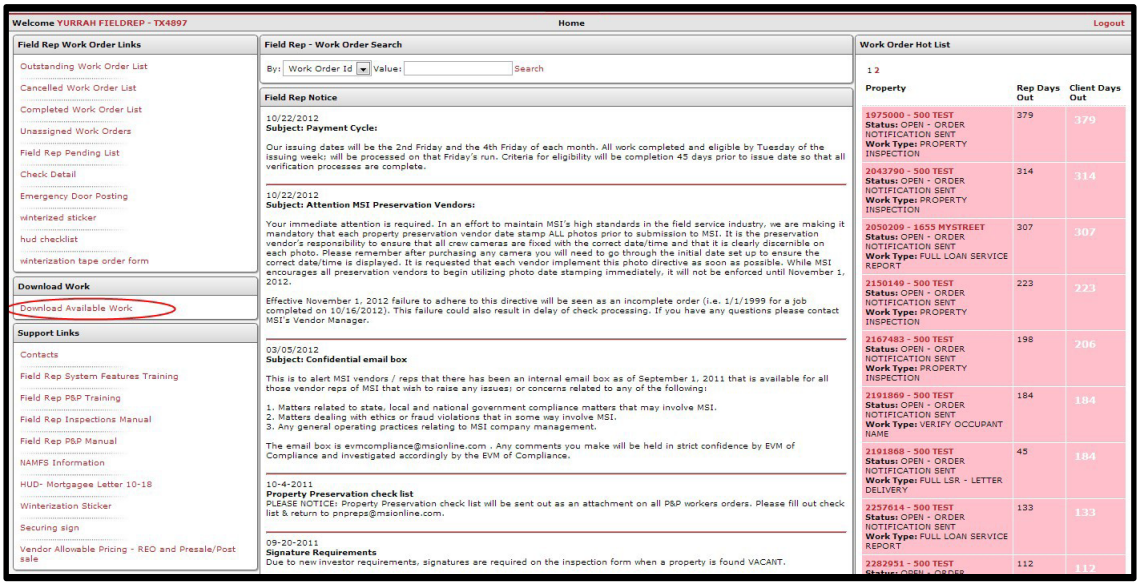
Field Rep – Downloading Available Work

When Clients create a work order, the system will automatically assign the work order to the Field Rep designated as PRIMARY for the zip code on the property address of the work order.

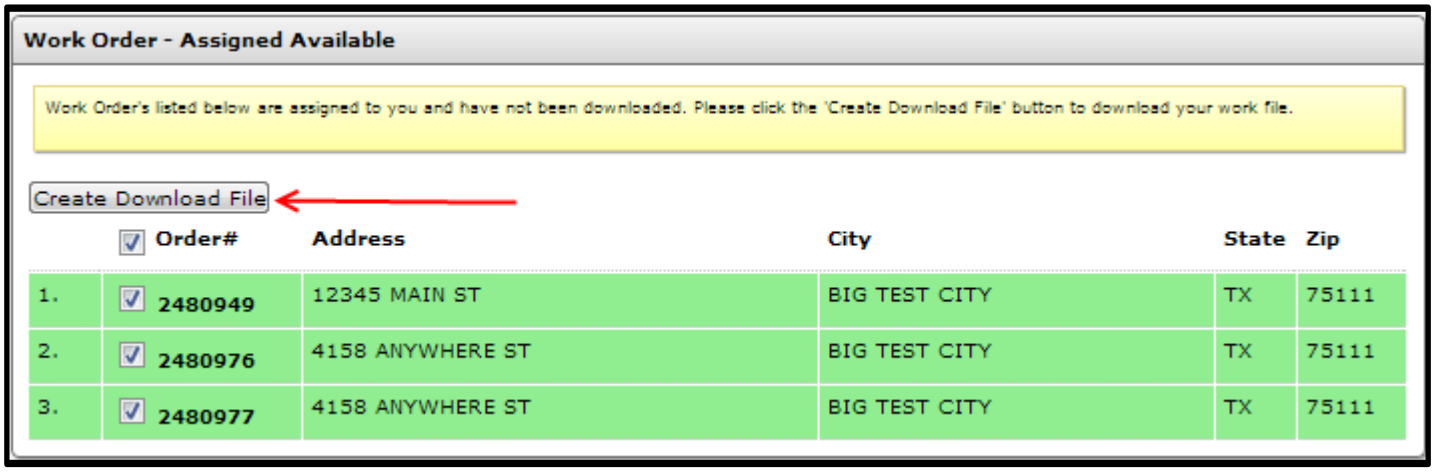
NOTE: An email will be sent to the Field Rep to notify that work has been assigned. This email will contain a link to the website, which, if used, will direct the Field Rep to the Download Available Work page automatically after logging in to the site.

CAUTION: A Field Rep will need to be sure to provide a valid email address. A Field Rep will need to accept email from online.com and not block these emails as spam or junk mail.

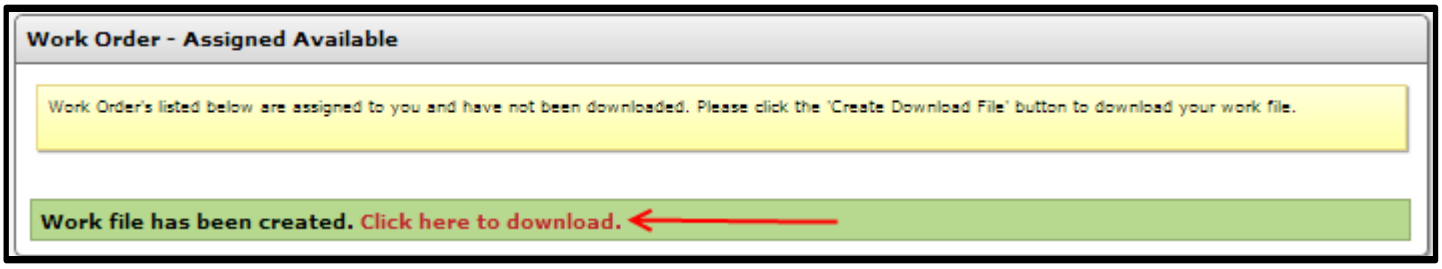
Check the left-hand frame on your home page for the 'Download Available Work' link.



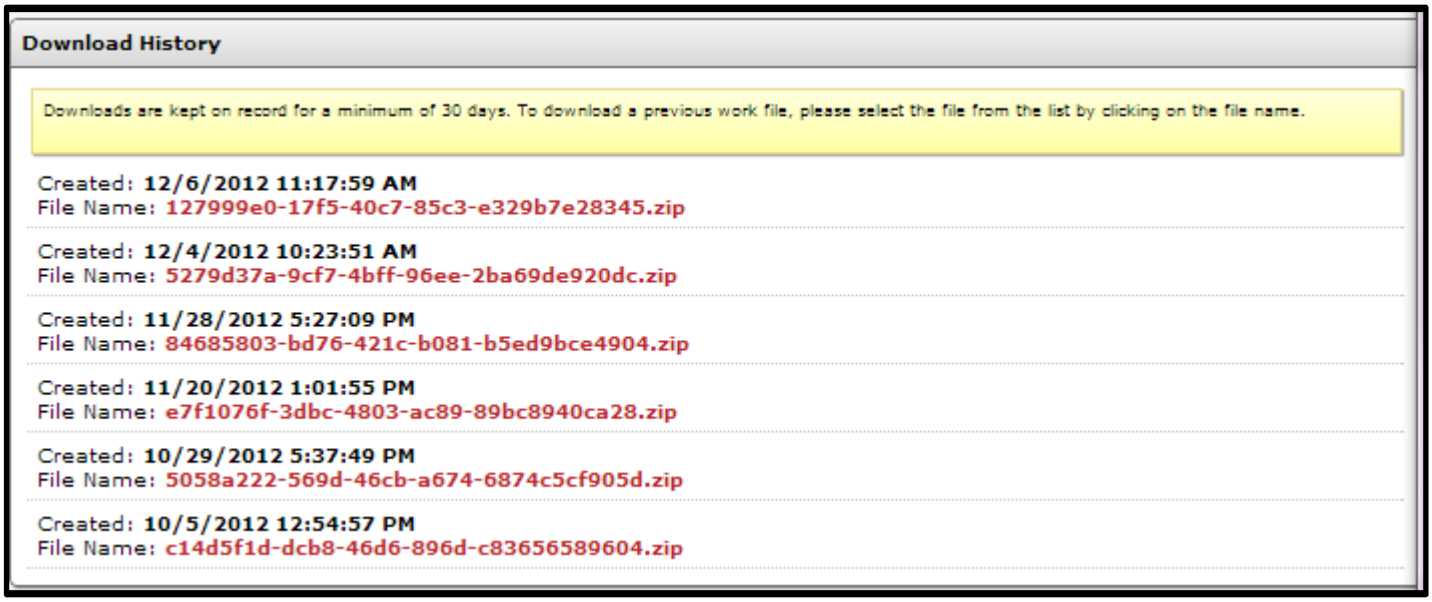
You will then be re-directed to the download page. The 'Create Download File' button will create a .zip file containing a merged .pdf of your work orders.



After a few moments, your work orders are ready to be downloaded!

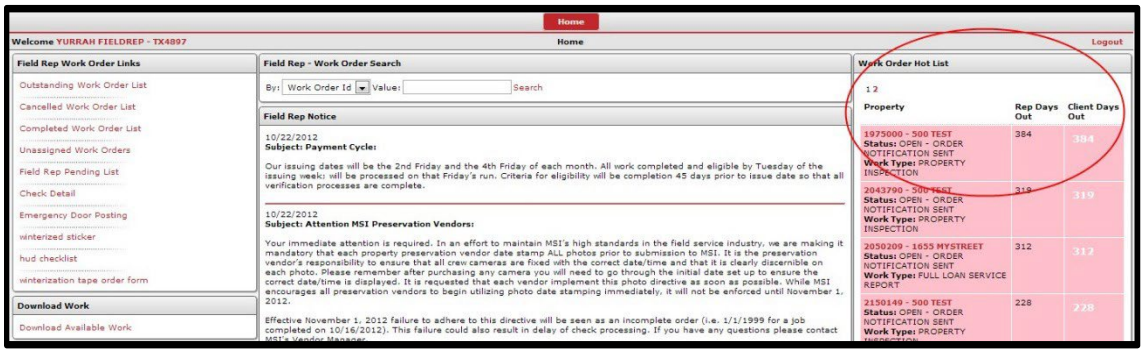


NOTE: Your previous work order files are archived in the right frame of the same page; they are sorted by the date created and transferred to your machine at any time.

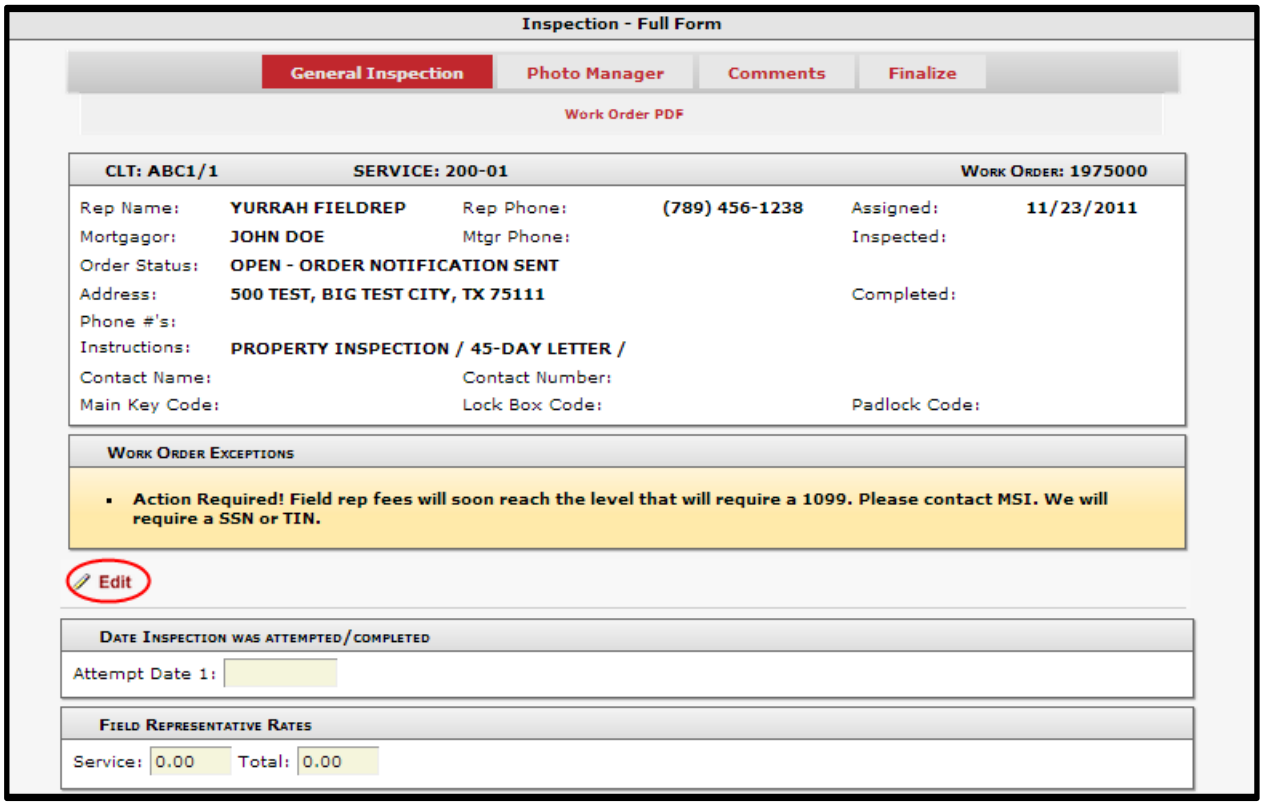


Field Rep – Updating an Inspection Form

Select the appropriate inspection from your Work Order Hot List.

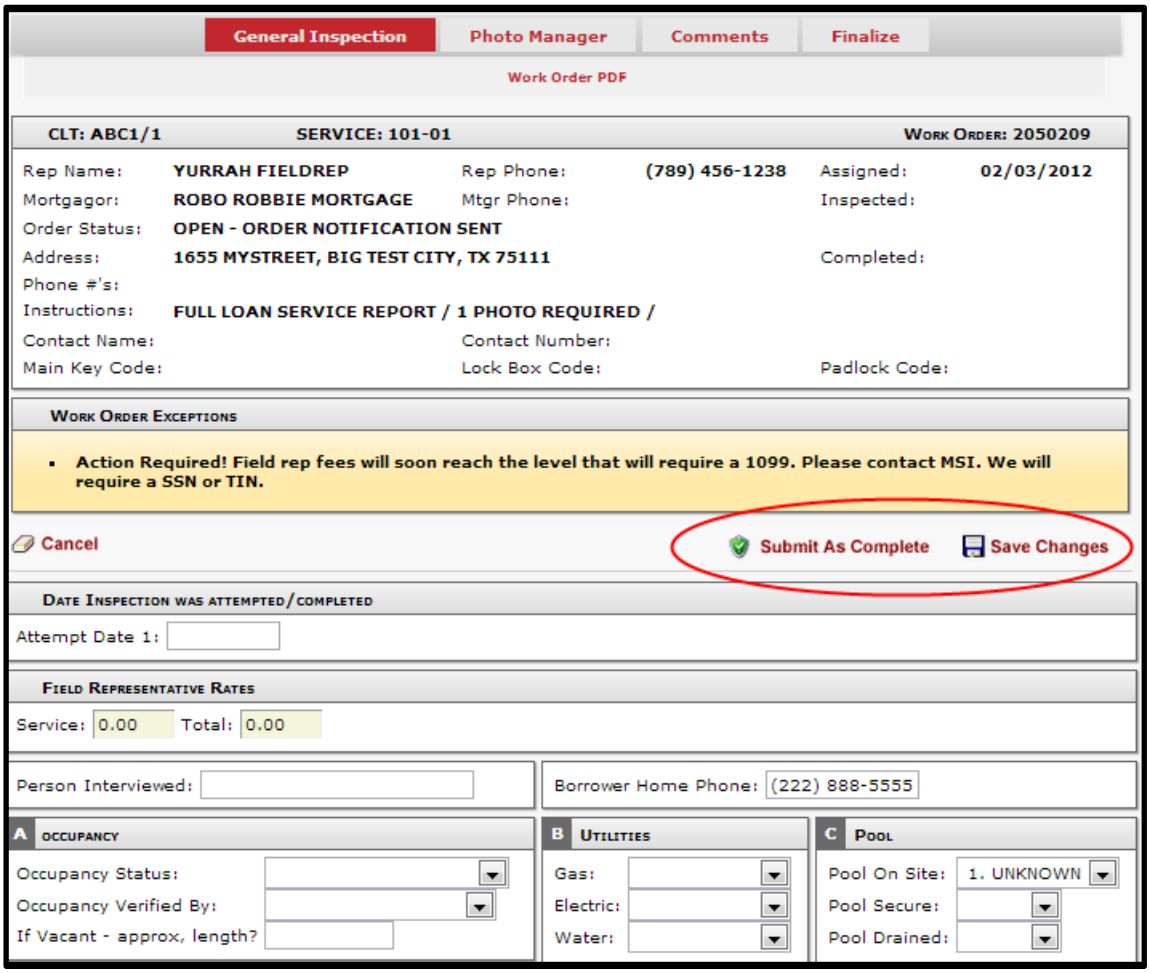


Click the **Edit** button to begin updating the Inspection Form.



When you're finished and have ensured that all relevant fields are filled, select **Submit as Complete.**

NOTE: Alternatively, you may choose Save Changes and complete the inspection at a later time.



If the inspection does not conform to the Client's standards, a validation error will occur. You will be prompted to correct any mistakes present - required invalid fields are flagged with a red outline.



The following are the minimum required fields that must have information provided on a work order:

Feature – Required Fields	Description
Attempt Date	This is a required field. This field requires a date to be provided in MMDDYYYY format. Optionally the date may be entered in MM/DD/YYYY format. **NOTE: The Attempt Date cannot be earlier than the Assigned date listed in the work order header. For example, if the work order was assigned to the Field Rep on 01/01/2010, Attempt Dates before that date e.g., 12/31/2009, will not be accepted.** **NOTE: The Attempt Date cannot be greater than the current date. For example, if TODAY's date is 04/01/2010, Attempt Dates in the future e.g., 04/02/2010 will not be accepted.** **NOTE: Some work orders may have up to three Attempt Dates. While it may be possible to complete a work order in one attempt, should multiple attempts be made, the requirements for dates regarding Assigned and current date are enforced on all Attempt Date fields.**
Occupancy Status	This is a required field. This field is a selectable list. At least one of the following values must be selected: OWNER OCCUPIED, OTHER OCCUPIED, TENANT OCCUPIED, VACANT SECURE, VACANT UNSECURE, PARTIALLY VACANT, UNABLE TO VERIFY, SECURITY GATE, BAD ADDRESS. **NOTE: If the Occupancy Status is UNABLE TO VERIFY, the work order will be submitted to my company for review before authorizing the work order for payment.** **CAUTION: If Occupancy Status is VACANT SECURE, VACANT UN-SECURE, or UNABLE TO VERIFY, additional information MUST be provided to return the work order to the Company. Carefully read the Work Order Exceptions that will be displayed. Work Order Exceptions will identify additional fields that require information.**
Occupancy Verify By	This is a required field. This field is a selectable list. At least one of the following values must be selected: DIRECT CONTACT, VISUAL, NEIGHBOR, MAILBOX, UTILITIES, PERSONAL ITEMS, REALTOR, SECURITY GUARD, MANAGER.
Building Type	This field is a selectable list. At least one of the following values must be selected: SINGLE FAMILY, DUPLEX, TRIPLEX, QUADPLEX, CONDO/TOWN/ROW HOUSE, MOBILE HOME, VACANT LAND, COMMERCIAL PROPERTY, APARTMENTS
Construction Type	This is a required field. This field is a selectable list. At least one of the following values must be selected: ALL BRICK, STUCCO, ALL FRAME, STONE, CONCRETE BLOCK, BRICK AND FRAME, METAL, ROCK, ALL CONCRETE.
Stories	This is a required field. This field is a selectable list. At least one of the following values must be selected: ONE STORY, TWO STORY, THREE STORY, SPLIT LEVEL, MULTILEVEL.

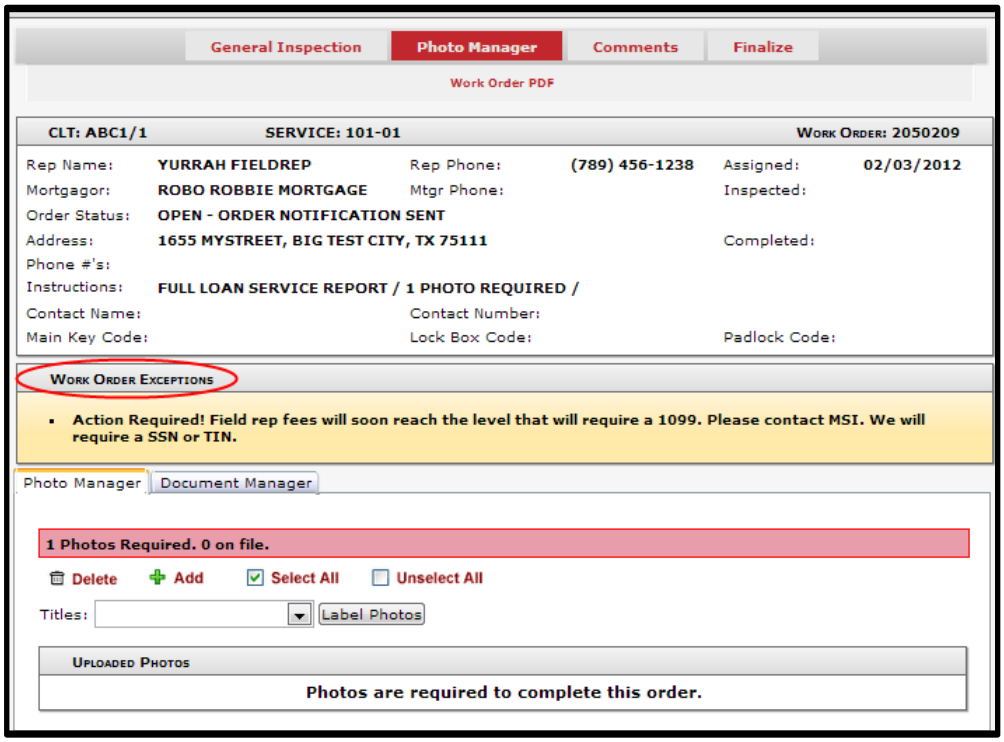
Feature – Required Fields	Description
Color of Dwelling	This is a required field. This field is a selectable list. At least one of the following values must be selected: BEIGE, BLACK, BLUE, BROWN, CREAM, GREEN, GREY, ORANGE, PINK, PURPLE, RED, WHITE, YELLOW.
Roof Type	This is a required field. This field is a selectable list. At least one of the following values must be selected: WOOD SHINGLE, COMP/ASPHALT, TILE/SLATE, ALUMINUM, TAR, FLAT, METAL.
Property Condition	This is a required field. This field is a selectable list. At least one of the following values must be selected: GOOD, FAIR, POOR, DAMAGED, UNKNOWN. **NOTE: If the Property Condition is POOR or DAMAGED the work order will be submitted to the Company for review before authorizing the work order for payment. Field Rep will not get paid until the work order passes internal review.** **CAUTION: If Property Condition is POOR or DAMAGED, additional information MUST be provided to return the work order to the Company. Carefully read the Work Order Exceptions that will be displayed. Work Order Exceptions will identify additional fields that require information.**
Neighborhood Condition	This is a required field. This field is a selectable list. At least one of the following values must be selected: IMPROVING, STABLE, DECLINING, UNKNOWN.
EMV	This is a required field. This field is a selectable list. At least one of the following values must be selected: 0-9,999; 10,000-24,999; 25,000-49,999; 50,000-74,999; 75,000-99,999; 100,000-124,000; 125,000-149,000; 150,000-199,999; 200,000-249,000; 250,000-499,999; 500,000-OVER **NOTE: The EMV (Estimated Market Value) ranges provided are intended to gather a general idea for the value of the property in the area. This value is not intended to represent an appraisal or BPO (Broker Price Opinion).**

Work Order Exceptions may also appear upon submission; the system will give you a detailed explanation of the exceptions found. The following table presents the possible Conditions that may be encountered along with the associated Work Order Exception that will be displayed:

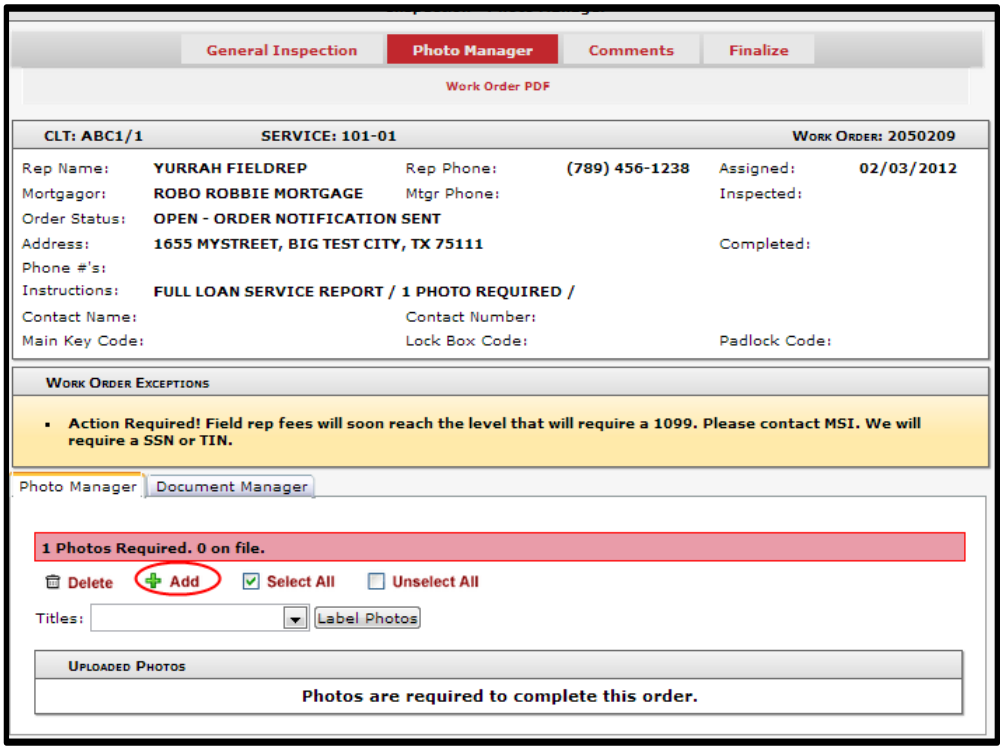
Feature – Required Fields	**Description**
Feature Occupancy Status Condition	Work Order Exception
VACANT SECURE	**NOTE: Section A: Properties reported as 'VACANT' require PHOTOS of the subject property.**
VACANT UNSECURE	**NOTE: Section A: Properties reported as 'VACANT UNSECURE' require Z: COMMENTS, to justify status.** **NOTE: Section A: Properties reported as 'VACANT UNSECURE' require E: MAINTENANCE RECOMMENDED. The options selected should identify what is needed to secure the property.** **CAUTION: Be sure to provide accurate details in the Maintenance Recommended section of the Inspection Form.**
UNABLE TO VERIFY	**NOTE: Section A: Property reported as 'UNABLE TO VERIFY'. Internal review required before authorization.**
Feature Gas, Electric, Water Condition	Work Order Exception
ON	**NOTE: Section A: Properties reported as 'VACANT' also have utilities reported as 'ON'. Internal review required before authorization.**
Feature Pool on Site Condition	Work Order Exception
YES	**NOTE: Section C: Properties reported with a 'POOL' require section C: POOL is filled out. Comments in section Z: Comments should identify what is needed to secure the property.** **NOTE: Pool Secure and Pool Drained fields require input.**

Feature – Required Fields	Description
Feature For Sale By Condition	Work Order Exception
OWNER	**NOTE: Section G: Properties reported as for sale by 'OWNER' require OWNER NAME.** **NOTE: Section G: Properties reported as for sale by 'OWNER' require OWNER PHONE.** **CAUTION: The Phone field will not accept a phone number of 000-000-0000.** **CAUTION: The Phone field only accepts numbers in the following valid formats:** • ***##########*** • ***###-###-#####*** • ***(###)###-#####***
REALTOR /BROKER	**NOTE: Section G: Properties reported as for sale by 'REALTOR/BROKER' require REALTOR NAME.** **NOTE: Section G: Properties reported as for sale by 'REALTOR/BROKER' require REALTOR PHONE.** **CAUTION: The Phone field will not accept a phone number of 000-000-0000.** **CAUTION: The Phone field only accepts numbers in the following valid formats:** • ***##########*** • *###-###-#####* • *(###)###-#####*
Feature Property Status /Damages Condition	Work Order Exception
ANY CHECK-BOX	**NOTE: Section H/I: Properties reported as 'DAMAGED' require COMMENTS and PHOTOS to justify status.** **NOTE: Section H/I: Property is reported as Damaged. Internal review required.**

Feature – Required Fields	Description
Feature Property Condition	Work Order Exception
POOR	**NOTE: Section I: Properties reported as 'DAMAGED' or 'POOR' require COMMENTS and PHOTOS to justify status.** **NOTE: Section H/I: Property is reported as Damaged. Internal review required.**
DAMAGED	**NOTE: Section I: Properties reported as 'DAMAGED' or 'POOR' require COMMENTS and PHOTOS to justify status.** **NOTE: Section H/I: Property is reported as Damaged. Internal review required.**
Feature Is Property Winterized Condition	Work Order Exception
YES	**NOTE: Section J: Properties reported as 'WINTERIZED' require J: WINTERIZATION be filled out.** **NOTE: Winterized By and Winterized Date fields require input.** **CAUTION: The Winterized Date field requires a date to be provided in MMDDYYYY format. Optionally the date may be entered in MM/DD/YYYY format.**
Feature Known Hazards? Condition	Work Order Exception
YES	**NOTE: Section L: Properties reported with 'HAZARDS' require COMMENTS with description of hazards.**



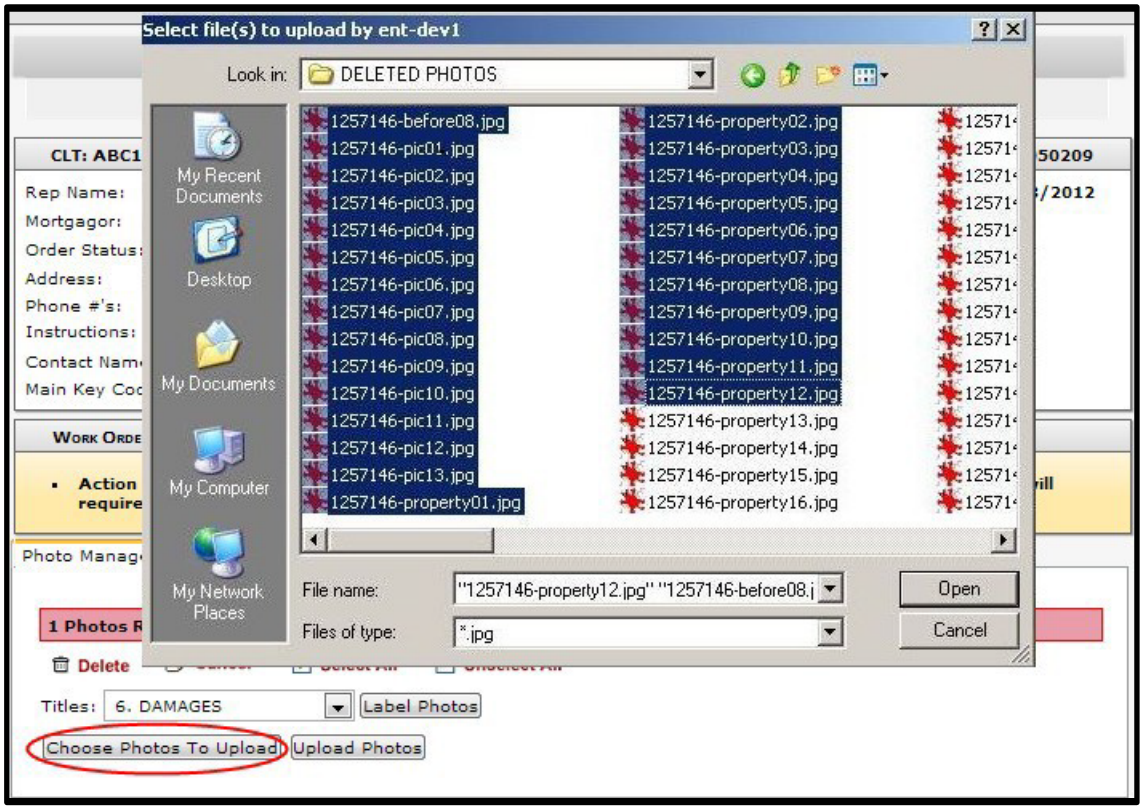
If your inspection form submitted with no errors, you will be automatically redirected to the Photo Manager. Select Add to begin the photo upload.



You should now see a **Choose Photos to Upload** button. Clicking this will bring up an explorer window where you can begin adding appropriate files.

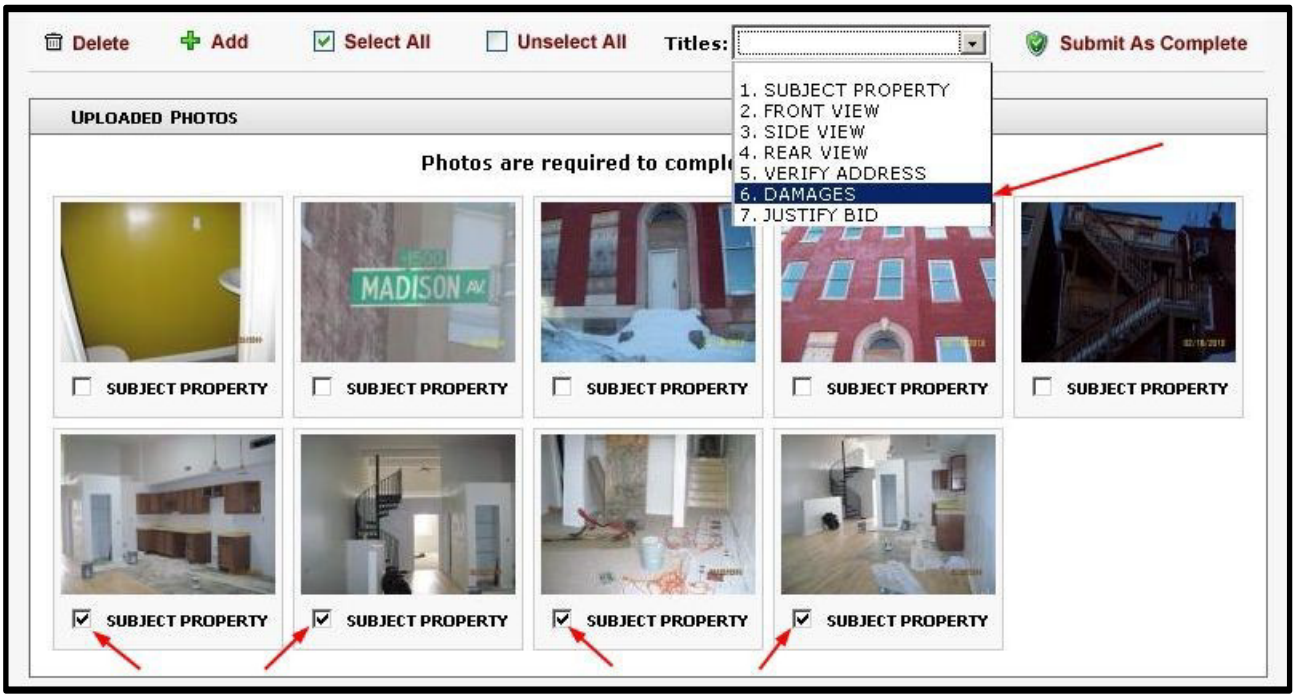
NOTE: You may need to refresh the page before your photos appear.

CAUTION: Please be patient! Slow upload speeds are usually a result of large images, try resizing your photos to a lower resolution. We recommend 640x480.



Once the process is complete, you should see your photos embedded, as shown here. This module will allow you to tag/categorize r uploads.

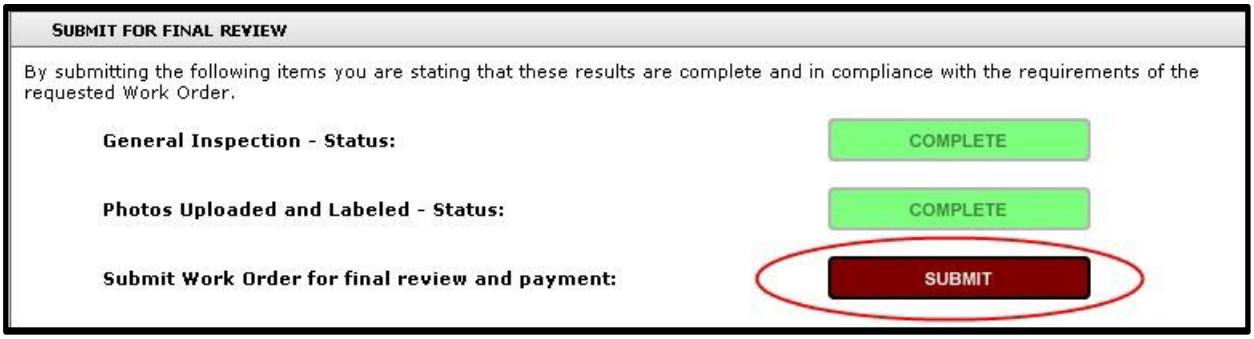




Once your photos have been submitted, go to the 'Finalize' tab and click the indicated Submit button to turn in your inspection for the final review!

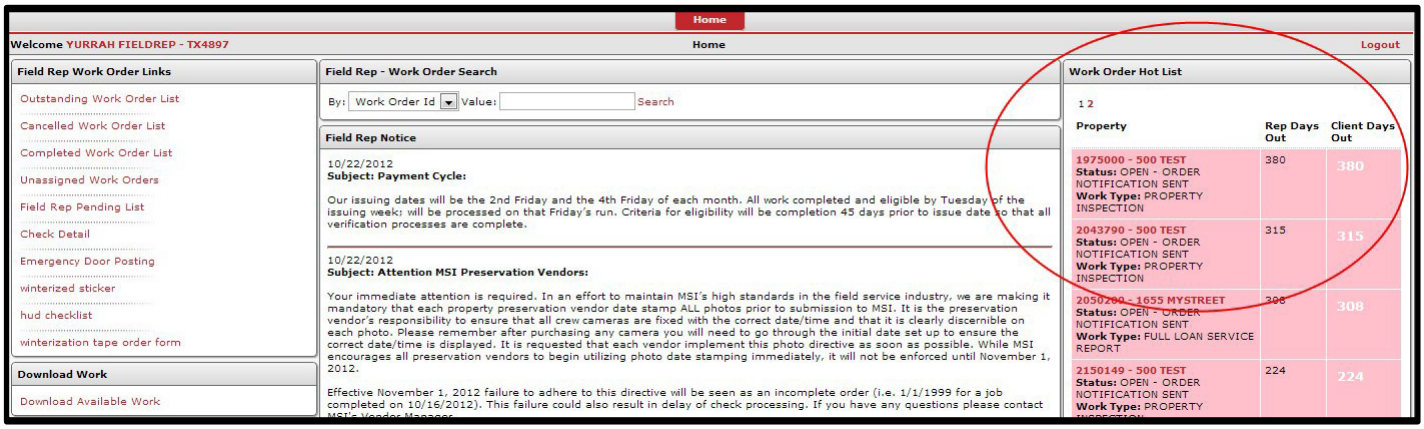
NOTE: The Submit button will not appear until the inspection form and photos have been uploaded without error.

NOTE: If, after clicking the SUBMIT button, the button changed to orange color with text indicating PENDING REVIEW, this signifies that the work order has been sent to the Company for Internal Approval.

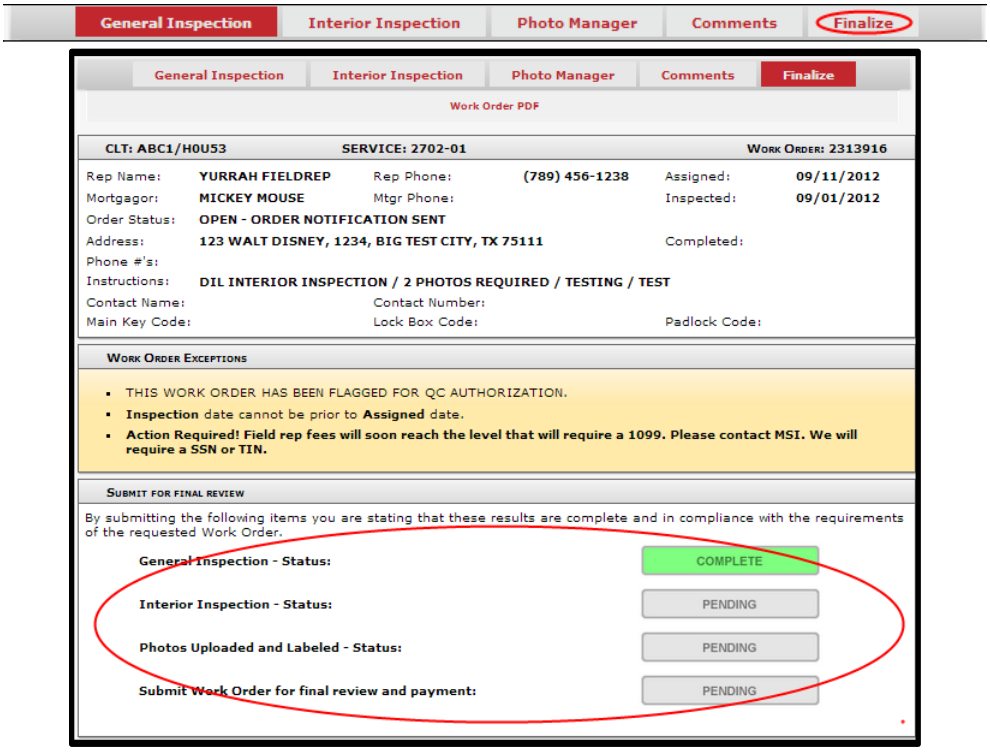


Field Rep – Checking the Status of a Work Order

Select the appropriate inspection from your Work Order Hot List.

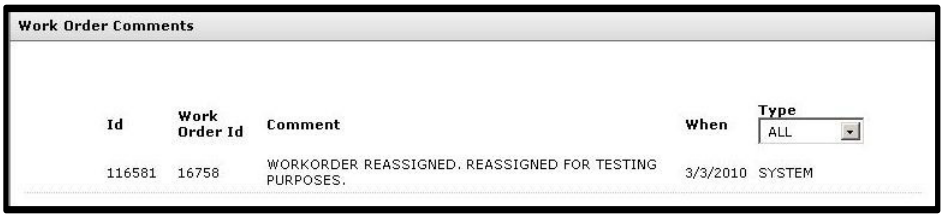


On the following page, click the **Finalize** tab.



This feature allows you to view the status of your order throughout the submission process.

NOTE: For more information, navigate to the notifications tab to view comments of the inspection. These are sortable by commenter via the Type drop-down menu.

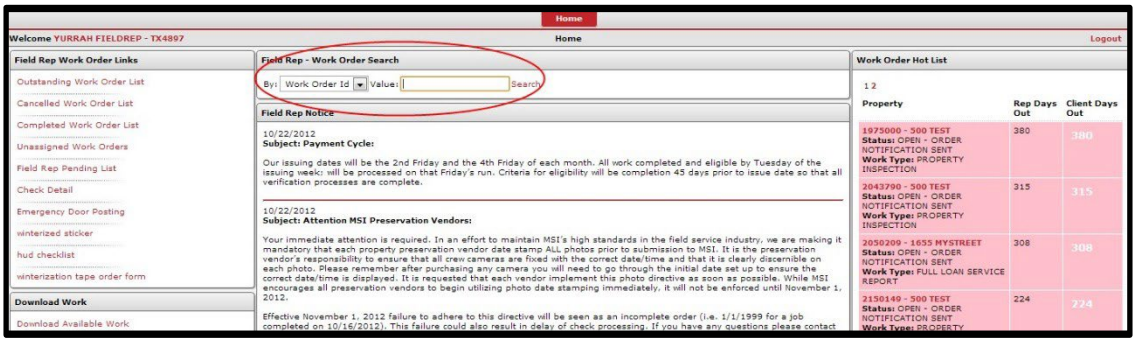


Field Rep – Work Order Search

When a Field Rep logs in to the website, they are able to search for information related to a Work Order. Information regarding Work Orders that are assigned to the Field Rep can be retrieved. The five ways to search for Work Order information are the following:

Feature – Required Fields	Description
Work Order ID	Search by Work Order ID accepts only numbers. An exact Work Order ID must be provided. Partial Work Order numbers will not return results.
Address	Search by Address accepts a Value that can be an exact or partial Street Address.
City	Search by City accepts a Value, which is an exact City name.
State	Search by State accepts only the standard two-character state abbreviations.
Zip Code	Search by Zip Code accepts a Value that can be an exact or partial five-digit Zip Code.
Client Name	Search by Client Name accepts a Value that can be an exact or partial Client name.

Navigate to your home page; the work order search is located in the middle frame.



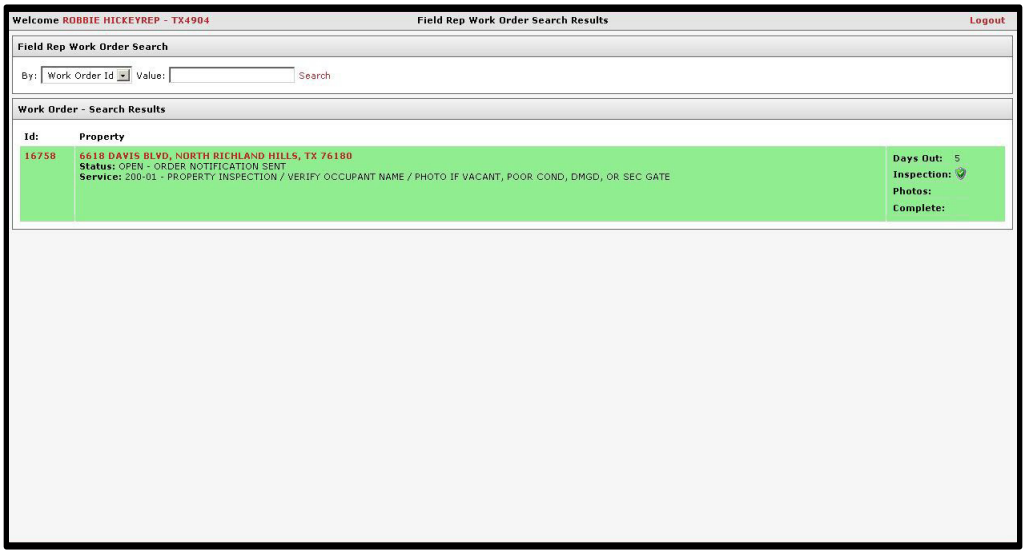
Type in the relevant criteria and click Search.

NOTE: There are several fields you can search by, all accessible from the drop-down menu.

NOTE: Searching by a specific Work Order ID will produce the timeliest results.



Assuming there is a valid record for your search query, you will be re-directed to the results page where you can now access the work order.



Revision Date	Revision Author	Revision #	Ticket Association
04/01/2011	Rob H.	1.0.0	
08/30/2012	Ron P.	2.1.0	CP - 30
11/12/2012	KaTrena Moore	2.1.1	CP - 73
02/13/2013	Ron P.	2.1.2	
04/30/2013	KaTrena Moore	2.1.3	NOW - 103
03/01/2026	KaTrena Moore	2.1.4	IT - 1699