Web Direct

Users Guide

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Table of Contents

Introduction

This guide provides descriptions of available views/functions as well as the features of Web Direct and acts as a reference guide to the user.

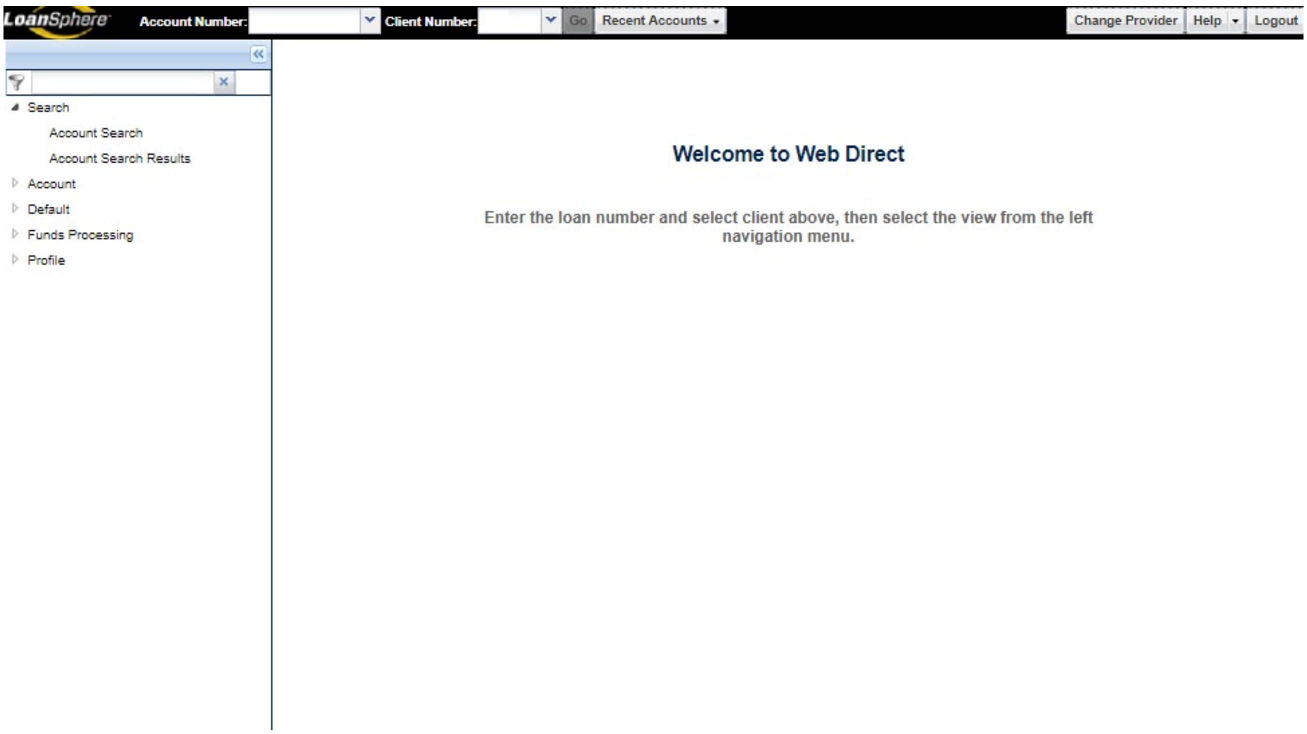
- There are over 30 different views and functions available in Web Direct. Your company has the ability to provide only the information you need to do your job in a user-friendly interface.
- Web Direct provides the information you need to complete your job in consistent, easy to understand views and functions.

For more in-depth information on Web Direct Views and how to perform functions within Web Direct, refer to the Online Help.

Welcome to Web Direct

Once you have logged into Web Direct, the Welcome to Web Direct landing page appears.

To view all of the menu items without manually choosing each drop-down menu heading, click the 'x' beside the unlabeled Filters field at the top of the menu to remove any filters and display all views available to you.



Tip:

- Recent Accounts is a drop-down list that provides direct access to accounts and views that you have most recently accessed.

Recent Accounts

Recent Accounts is accessible via the toolbar at the top of the Web Direct window. It enables you to do the following:

- Clear Recent Accounts
- Export Histories of Recently Viewed Loans – Web Direct enables you to export the loan numbers and borrower names of loans viewed for the selected provider. The system retains histories only for the current session.
- Return to Loans Worked during the Current Session – Web Direct enables you to return to loans worked during the current session without having to search for the loans. When **Recent Accounts** located at the top of the page displays a down arrow, loans worked during the current session are available.

Clear Recent Accounts

1 Click **Recent Accounts** at the top of the page.

An expanding menu displays the loan numbers and borrower names for loans that you accessed during the current session. Loans are listed in the order in which you accessed them.

2 Scroll to the bottom of the drop-down list and click **Clear Recent Accounts**.

Recent Accounts no longer displays the list of previously viewed loan numbers and borrower names.

Export Histories of Recently Viewed Accounts

1 Click **Recent Accounts** at the top of the page.

In the drop-down list, scroll down and click **Export**.

2 The Export Recent Access Loan List dialog box appears.

3 Type a name in the **File Name** field.

4 Click **OK**.

The File Download dialog box appears.

5 Make a selection and continue, as necessary.

Return to Loans Worked During the Current Session

1 Click **Recent Accounts** at the top of the page.

An expanding menu displays the loan number and borrower names for loans you accessed during the current session. Loans are listed in the order in which you accessed them.

2 In the drop-down list, locate the account number and borrower name in the list of recently accessed accounts and position your cursor over the loan information.

An expanding list displays the areas of the application you recently worked for the selected loan.

3 Select one of the recent views from the expanding list.

Web Direct displays the related area of the application for the selected account.

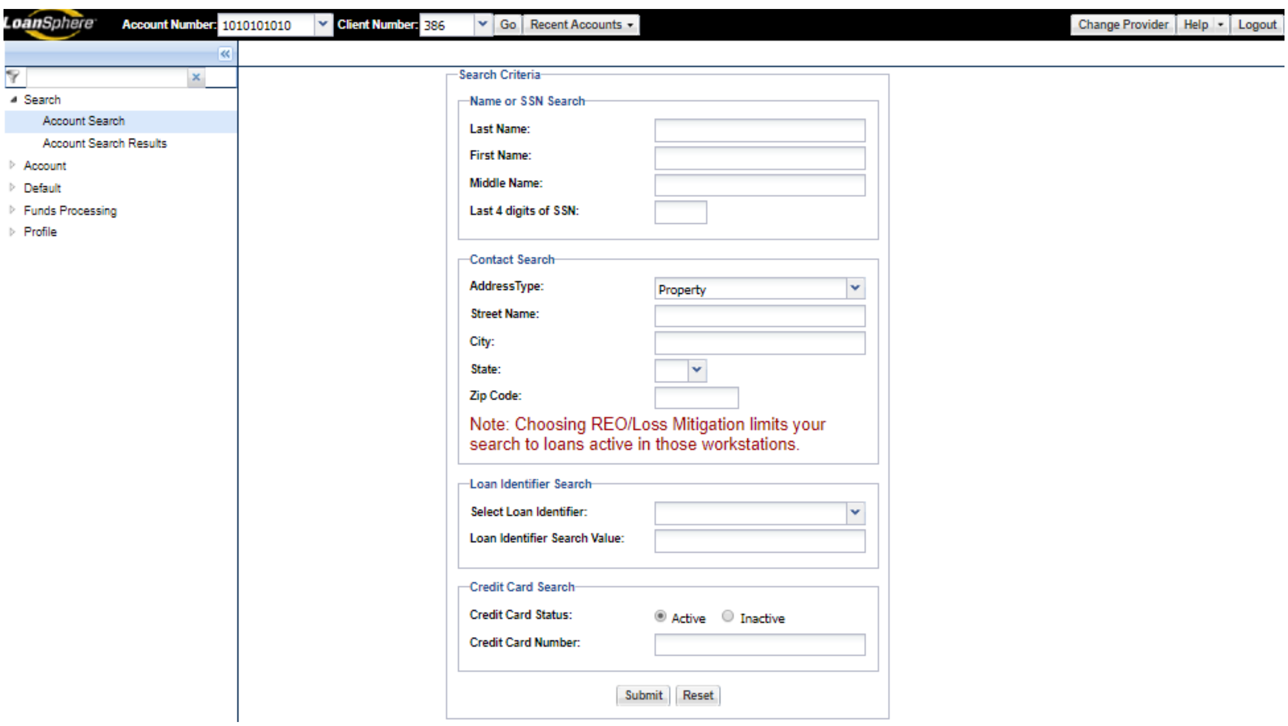
Search

Account Number Search

When you know the loan number:

Enter the associated number in the **Account Number** field, choose the view, and click **Go**.

If you do not know the account number, use the **Account Search** view to search on other account-related criteria.

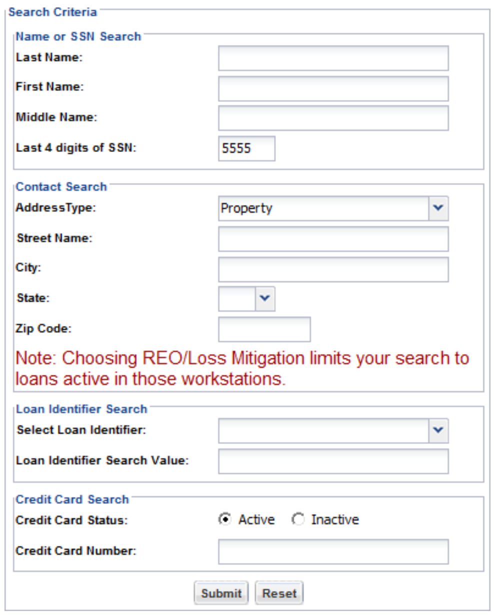


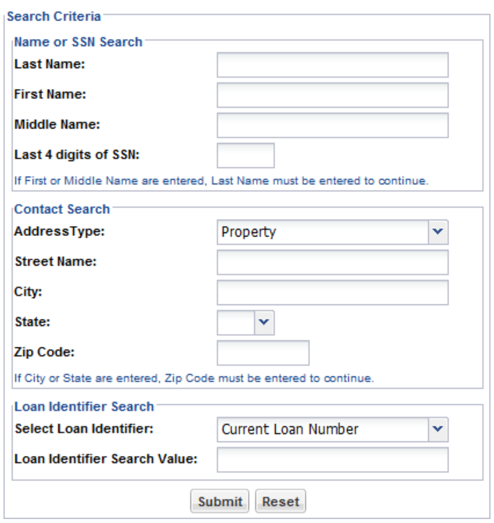
Account Search

The Account Search view enables you to search for an account, even if you do not know the account number, using criteria such as borrower's name, address, or some other account parameter, such as investor number.

1 Click **Account Search** in the navigation tree under Account.

Depending on your privileges, one of the following views appears:





2 Enter search criteria.

3 Choose one or a combination of any of the search criteria.

The search results are returned.

Account Search Results

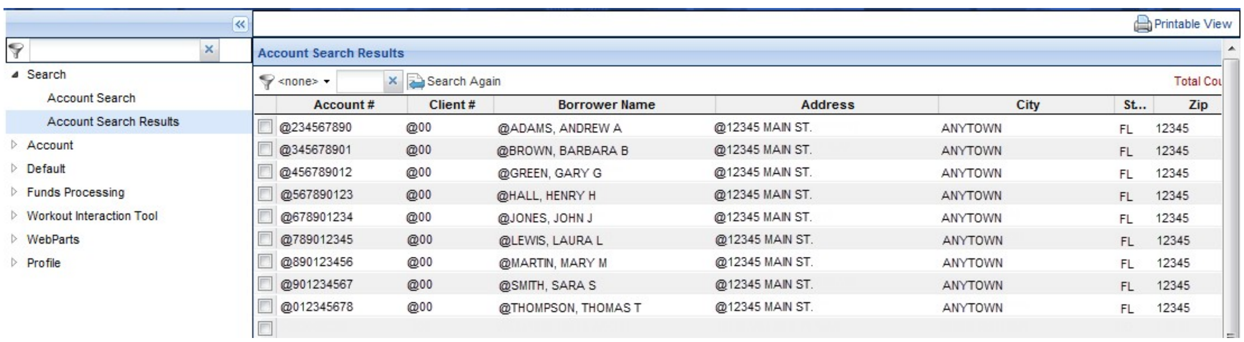
The Account Search Results view displays the results of your account search.

Tip:

- Each view in Web Direct has static information that appears at the top of each screen based on the type of loan displayed. The display for consumer accounts is different from mortgage account information and is dynamic based on the loan selected.

From this view:

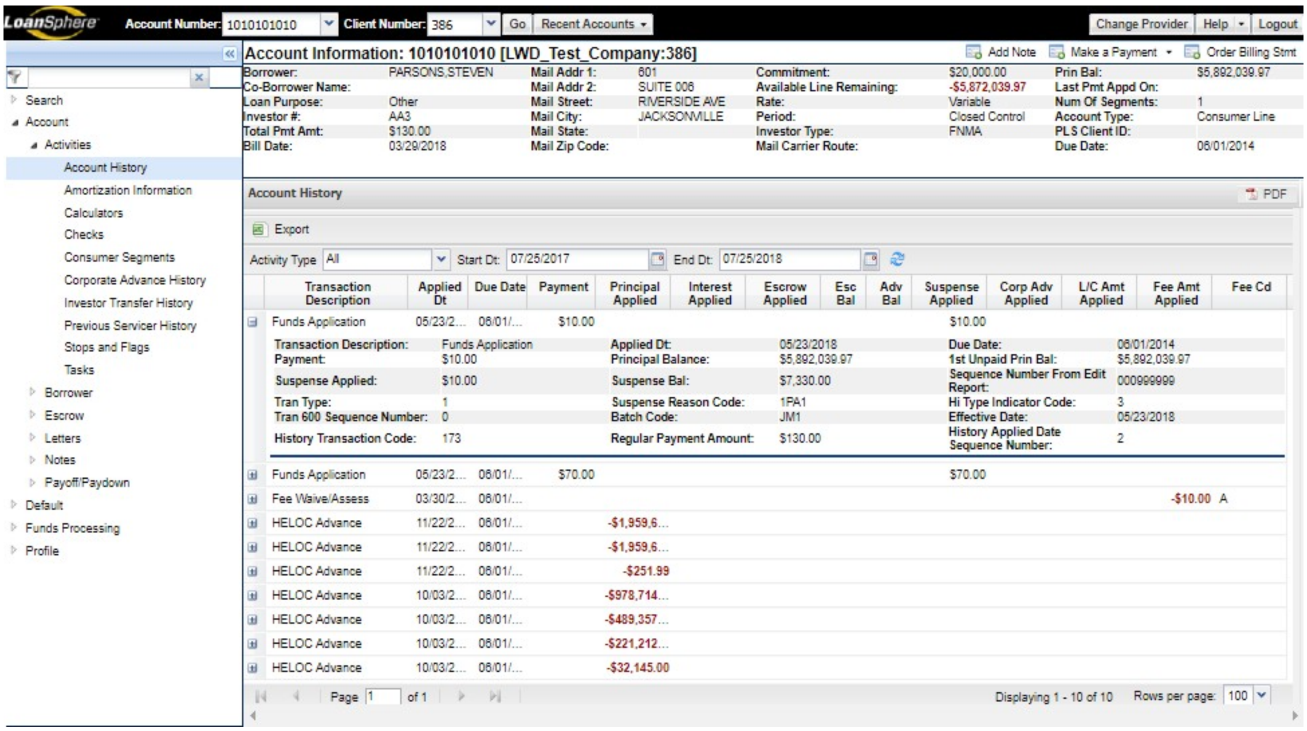
1. Perform an account search.
2. Select an account by clicking the check box next to the account number.
3. Select a view in the left pane.
4. Click **Go** to view information for the selected account.



Account

Account History

The Account History view displays up to 36 months of financial transaction history.



To filter only the groups of information you want to view:

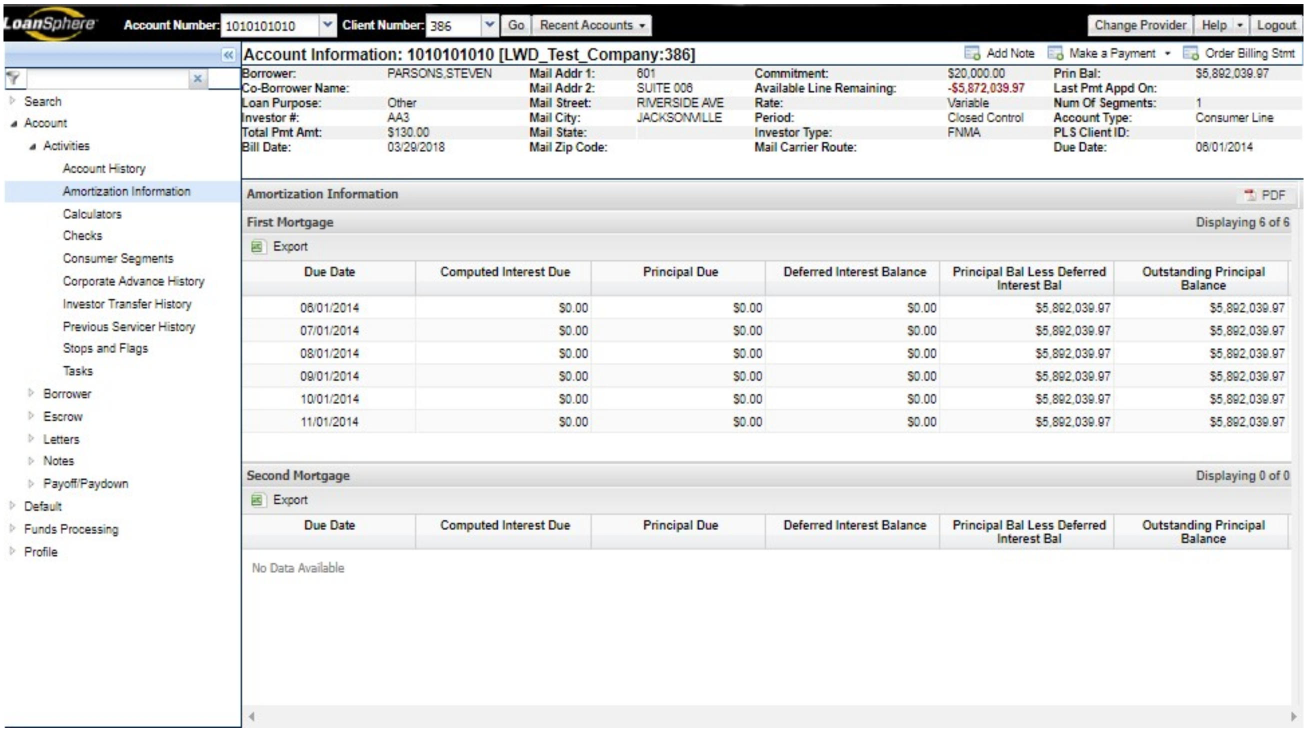
1. In the **Activity Type** drop-down list, select the activity type.
2. Enter the date range in the **Start Dt** and **End Dt** fields. The view defaults to the last 12 months of transaction information.
3. Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort and/or select specific columns to display.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Amortization Information

Amortization Information enables you to access amortization information on first and second mortgages based on the current loan terms. You can also view the amortization information in PDF format and export amortization information.



Export Amortization Information for a First or Second Mortgage

1. Open the Amortization Information page for a loan.
2. Click **Export** in the First Mortgage or Second Mortgage section.
3. Type a name for the export file and select the appropriate format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

   Web Direct saves or displays the exported file with the amortization information for the selected first or second mortgage.

Generate Amortization Information to PDF

1. Open the Amortization Information page for a loan.
2. Click **PDF**.

The File Download dialog box appears.

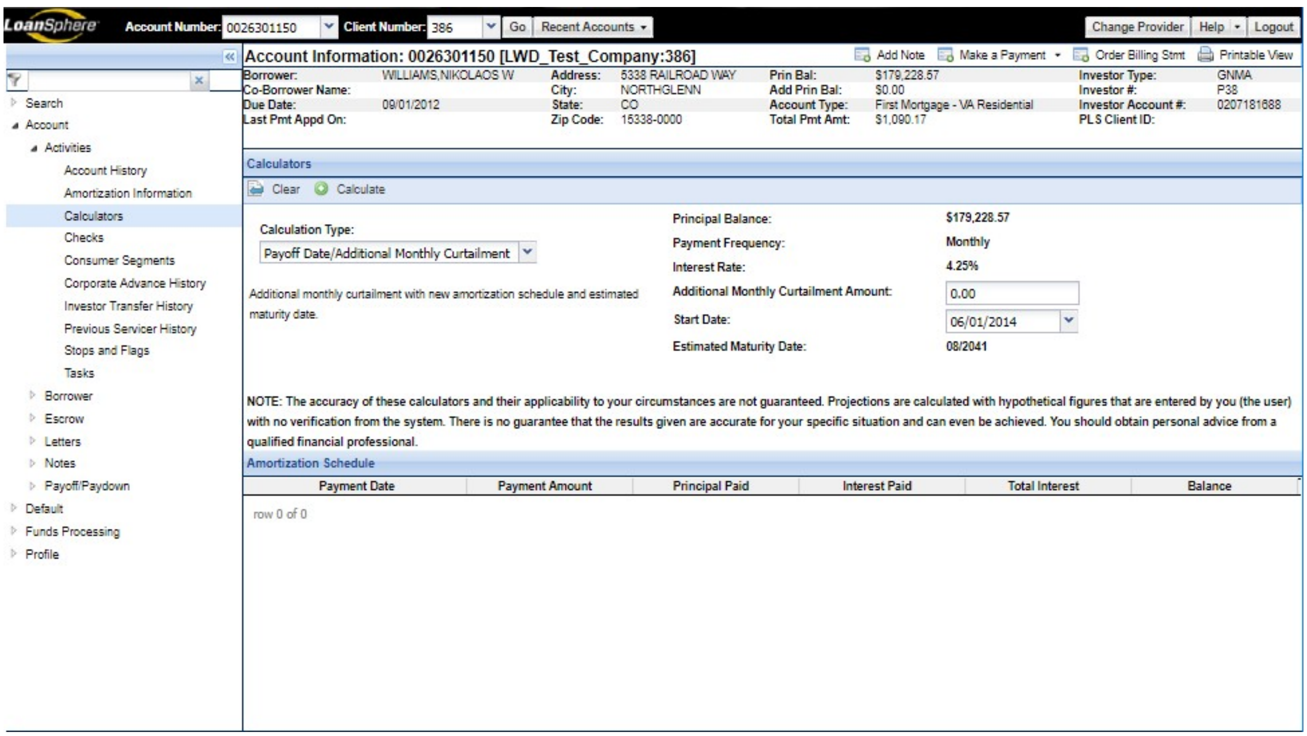
3 Do one of the following:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

4 Print, save, or close the PDF, as necessary.

Calculators

Calculators enables users to enter information and calculate what-if scenarios of amortization schedules, principal curtailments, and maturity dates.



Perform Loan Calculations

1 Click **Calculators** in the navigation tree under Account >> Activities**.**

The calculator information appears.

2 Depending on the kind of calculation you want to perform, select the type in the **Calculation Type** field.

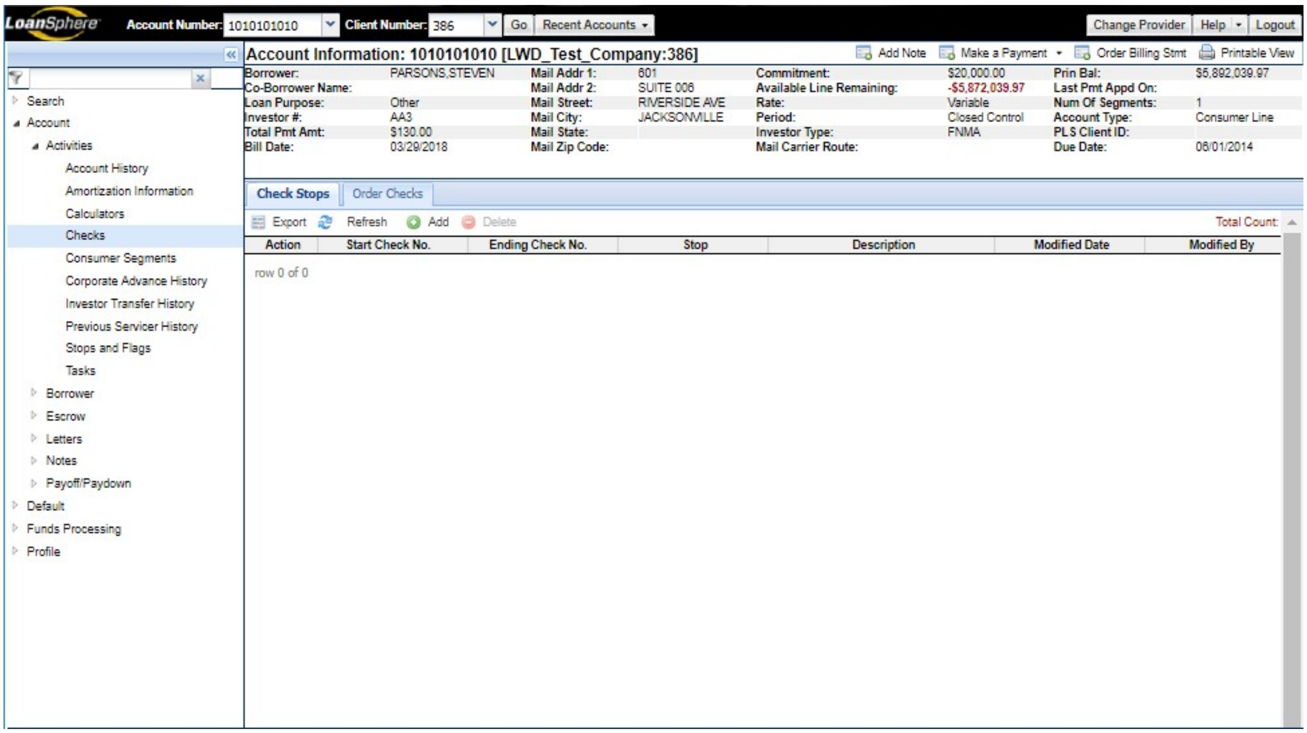
3 Complete the fields, as applicable.

4 Click **Calculate**.

The results appear in the lower portion of the screen.

Checks

The Checks view enables you to view check stops and order checks for Consumer accounts.



Add Check Stops

1. Click **Checks** in the navigation tree under Account >> Activities.

   The Checks view appears.
2. On the Check Stops tab, click **Add**.
3. Enter Beginning Check and Ending Check numbers.
4. Select the **Stop** code.
5. Click **OK**.

The **Check Stops** area displays information about the check stop that you just added.

The system automatically passes information about the check stop to MSP.

Delete Check Stops

1. Click **Checks** in the navigation tree under Account >> Activities.

   The Checks view appears.
2. On the Check Stops tab, select the check stop that you want to delete.

3 Click **Delete**.

The Delete Check Stop dialog box displays a confirmation message.

4 Click **Yes**.

Export Check Stops

1 Click **Checks** in the navigation tree under Account >> Activities.

The Checks view appears.

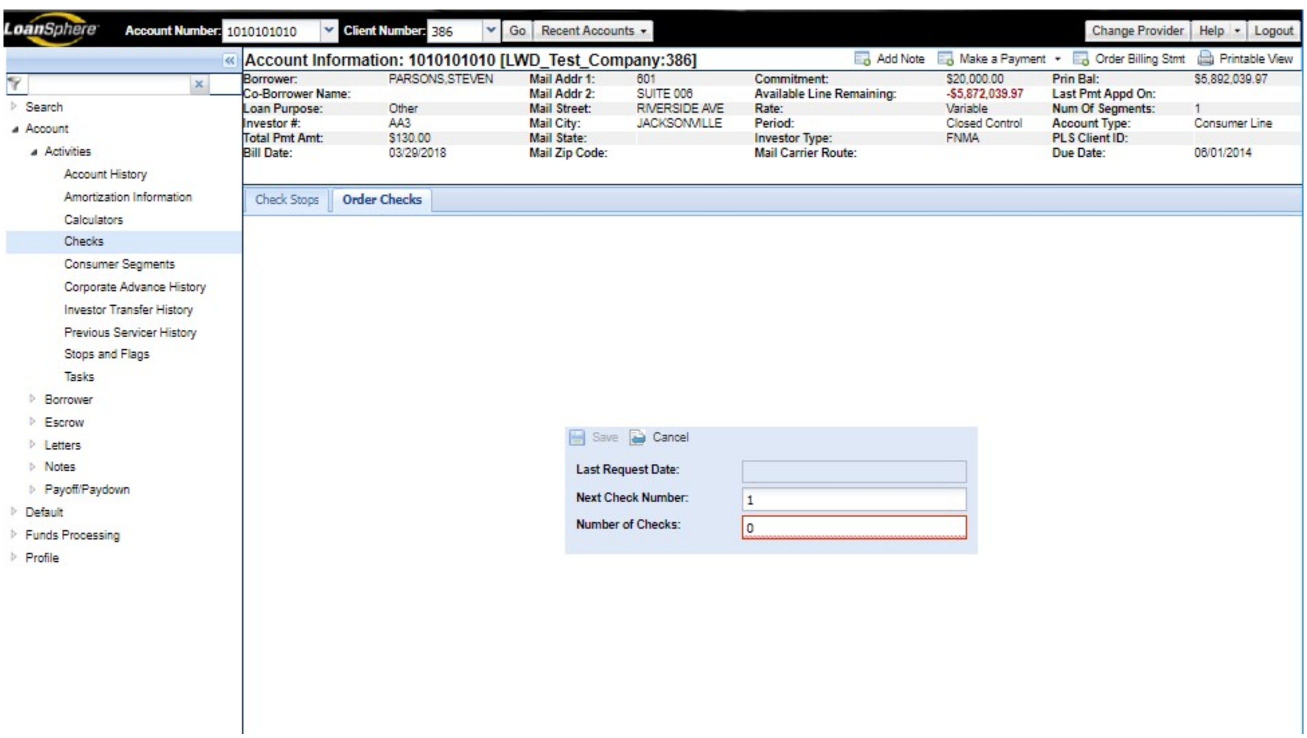
2 On the Check Stops tab, click **Export**.

A window appears with the system name of the file and a selection of export formats:

- Excel
- Standard

3 Modify the exported file name as desired and select the export format.

4 Click **OK**.



Order Checks

1 Click **Checks** in the navigation tree under Account >> Activities.

The Checks view appears.

2 Click the **Order Checks** tab.

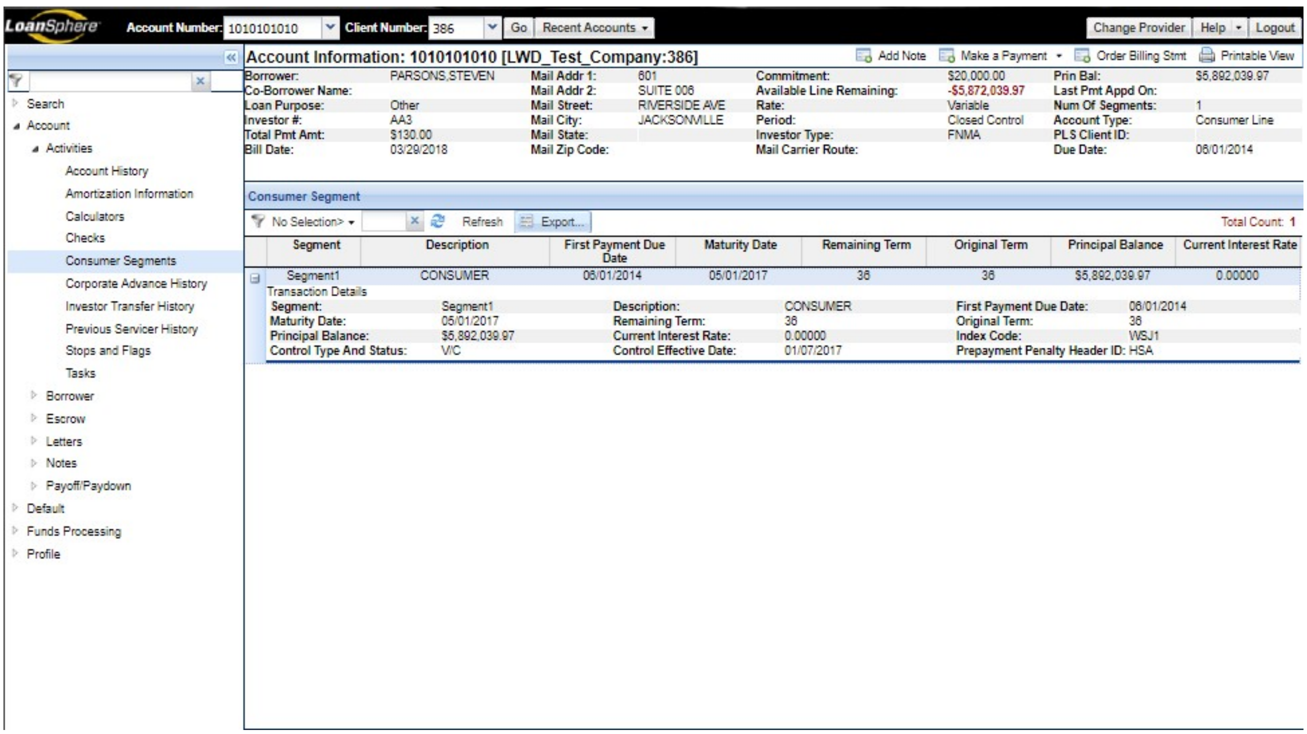
3 Enter values in the **Next Check Number** and **Number of Checks** fields.

The number of checks must be between **1** and **99.**

4 Click **Save**.

Consumer Segments

The Consumer Segments view displays consumer segment-specific information for all loan segments associated with a loan.



To filter only the information you want to view:

1 Click No Selection>, and choose the field you want to filter.

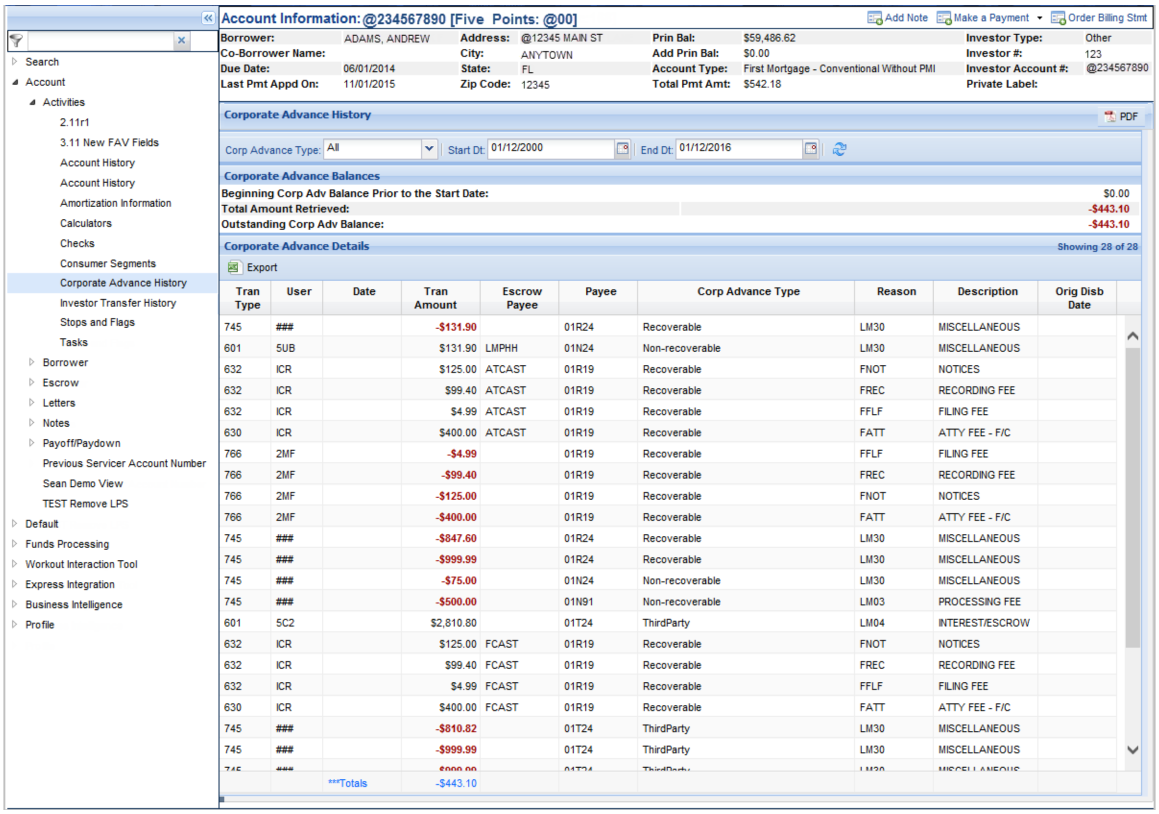
2 Click Refresh and all other transactions are filtered out of the view.

3 Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Corporate Advance History

Corporate Advance History enables users to view and export the corporate advance history of an account.



Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort.
- The Refresh button updates the view based on the selections in the **Corporate Advance Type**, **From Date**, and **To Date** fields.

View Corporate Advance History

1. Search for a loan.
2. Click **Corporate Advance History** in the navigation tree under Account >> Activities.

   The Corporate Advance History page appears.
3. In the **Corp Advance Type** drop-down list, select the corporate advance type that you want to view. All corporate advance types display by default.
4. Select the desired date range in the **Start Dt** and **End Dt** fields.
5. Click Refresh.

6 View the fields.

7 To filter the displayed corporate advance transactions, click the drop-down arrow next to the column label and enter or select the desired Filter option.

Export Corporate Advance History Information

1 Click **Corporate Advance History** in the navigation tree under Account >> Activities.

The Corporate Advance History view appears.

2 Click Export.

The Export dialog box appears with the system name of the file and a selection of export formats:

- Excel
- Standard

3 Modify the exported file name as desired and select the export format.

The exported file includes corporate advance transactions currently displayed in the Corporate Advance History view, based on the date range, corporate advance type, and filter selections.

4 Click **OK**.

Web Direct produces a file with the corporate advance history information.

Generate Corporate Advance History Information to PDF

1 Click **Corporate Advance History** in the navigation tree under Account >> Activities.

The Corporate Advance History view appears.

2 Click PDF.

The File Download dialog box appears.

3 Do the following, as necessary:

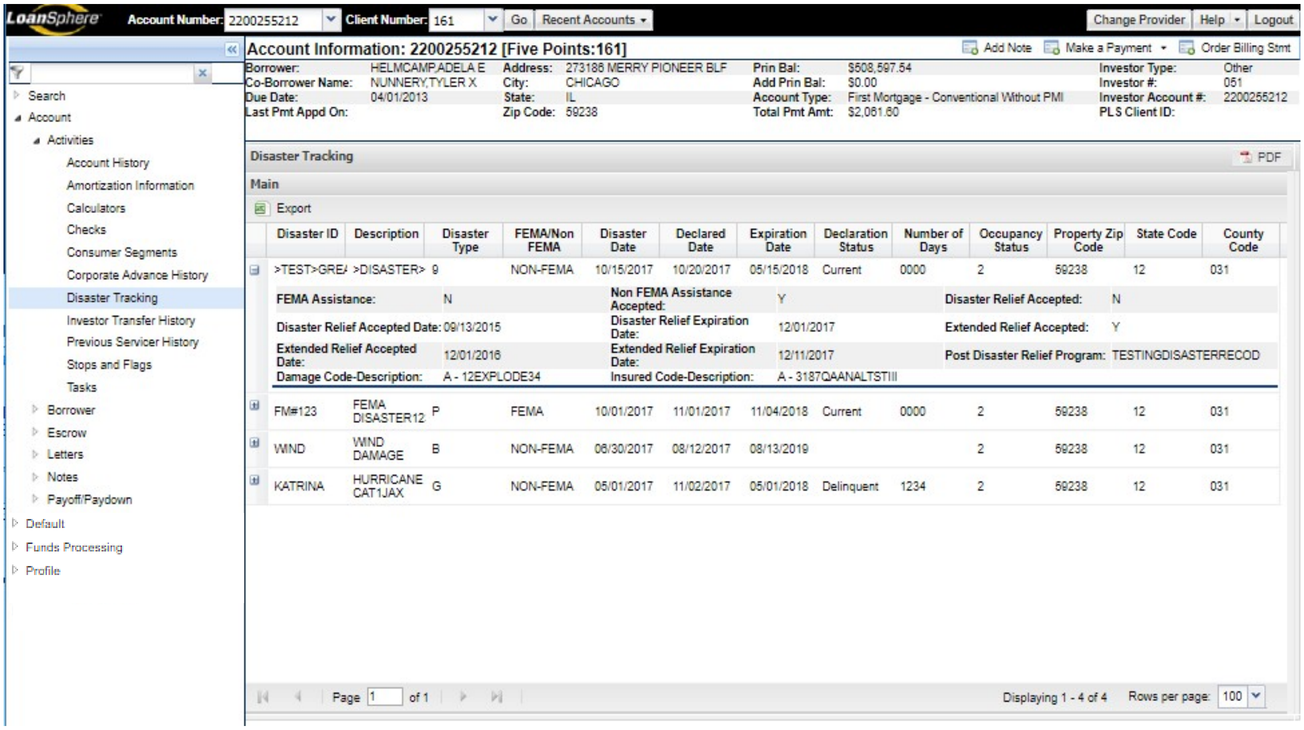
- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

4 Print, save, or close the PDF, as necessary.

The PDF file displays the corporate advance transactions as they appear in the view, according to the date range and corporate advance type selected and any other column filters.

Disaster Tracking

Disaster Tracking, accessible from Account >> Activities in the navigation tree, enables you to view loan information that is potentially impacted by natural disasters. The Disaster Tracking page displays 27 fields from the DTL1/MAIN in MSP. You must have the appropriate security privileges and permissions to view disaster information.



View Disaster Tracking Information

1 Search for a loan.

2 Click **Disaster Tracking** in the navigation tree under Account >> Activities.

The disaster tracking information appears.

Generate Disaster Tracking to PDF

1 Open the Disaster Tracking view.

2 Click **PDF**.

The File Download dialog box appears.

3 Do one of the following:

- To preview the PDF file click **Open**
- To save the PDF fole click **Save**.

4 Print, save, or close the PDF as necessary.

Export Disaster Tracking Information

1 Open the Disaster Tracking view.

2 Click **Export**.

The Export dialog box appears.

3 Type a File Name.

4 Select the appropriate format.

5 Clock **OK**.

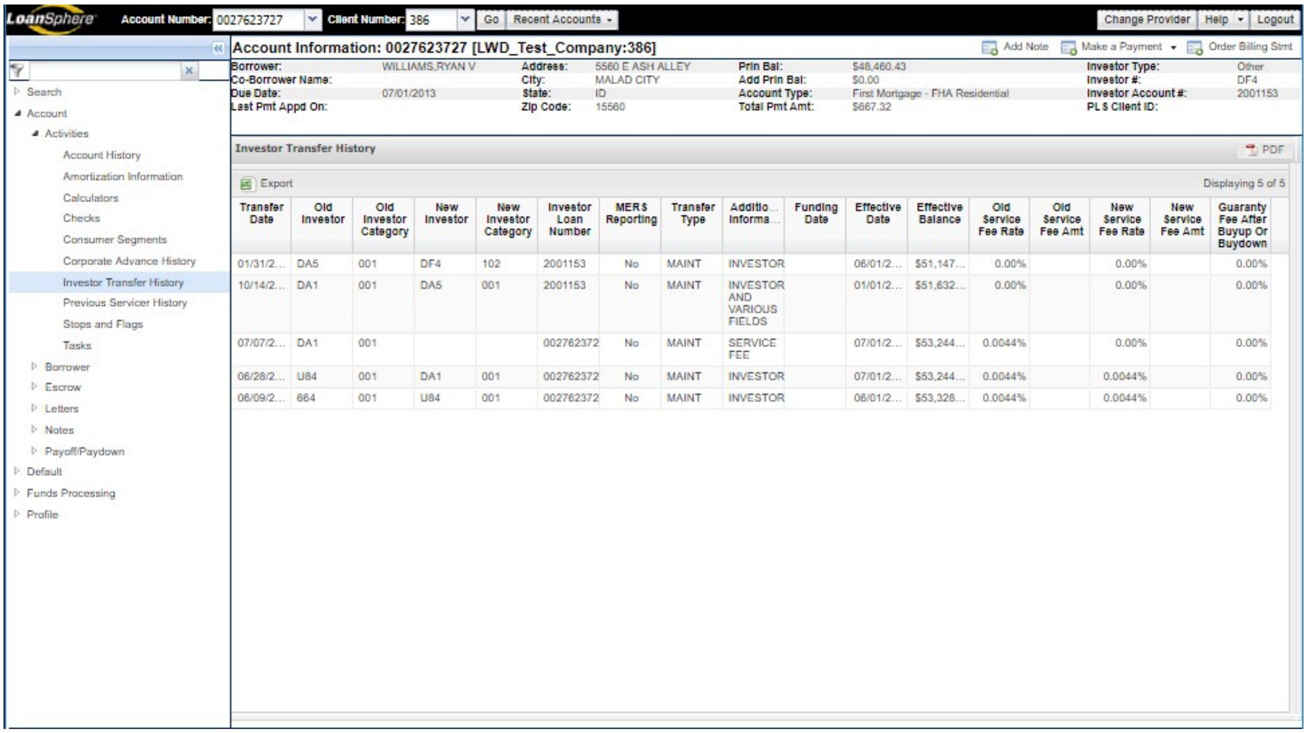
6 Do the following as needed.

- To preview the exported file, click **Open**.
- To save the exported file, clock **Save**.

Web Direct saves or displays the exported file with the disaster tracking information.

Investor Transfer History

Investor Transfer History enables users to view historical transfer transaction information for a loan. Users can also generate investor transfer history to PDF or export it.



View Investor Transfer History

1. Search for a loan.
2. Click **Investor Transfer History** in the navigation tree under Account >> Activities.

   The Investor Transfer History page appears.
3. View the fields.
4. Do the following, as necessary.
   - Generate the investor transfer history information to PDF format.
   - Export investor transfer history.
   - To continue working on the selected loan, make a different selection from the navigation tree.
   - Click **Account Search Results** in the navigation tree under Search.
   - Search for a loan.

Export Investor Transfer History

1. Open the Investor Transfer History view.
2. Click **Export**.

The Export dialog box appears.

3 Type a name for the export file and select the appropriate format.

4 Click **OK**.

5 Do the following, as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

Web Direct saves or displays the exported file with the investor transfer history information.

Generate Investor Transfer History to PDF

1 Open the Investor Transfer History view.

2 At the top left of the Investor Transfer History section, click **PDF**.

The File Download dialog box appears.

3 Do one of the following:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

4 Print, save, or close the PDF, as necessary.

Previous Servicer History

Previous Servicer History, accessible from Account >> Activities>> in the navigation tree, enables you to view and export previous servicer history beginning date balance and history year-to-date information. Users can also generate a previous servicer history to PDF.

View Previous Servicer History

1. You must have the appropriate privileges to view Previous Servicer History.
2. Search for an account.
3. Click **Previous Servicer History** in the navigation tree under Account >> Activities.
4. The **Previous Servicer History** page appears.

Export Previous Servicer History

1. Open the Previous Servicer History view.
2. Clock Export at the top of the previous Servicer History area and make a selection from the drop-down list.

   The Export dialog box appears
3. Type a name for the export file and select the appropriate format.
4. Click OK.
5. Do the following, as necessary.
   - To preview the exported file, click Open.
   - To save the exported file, click Save.

   Web Direct saves or displays the exported file with the previous servicer history information.

Generate a Previous Servicer History PDF

1. Open the Previous Servicer History view.
2. Click **PDF** at the top of the Previous Servicer History area.

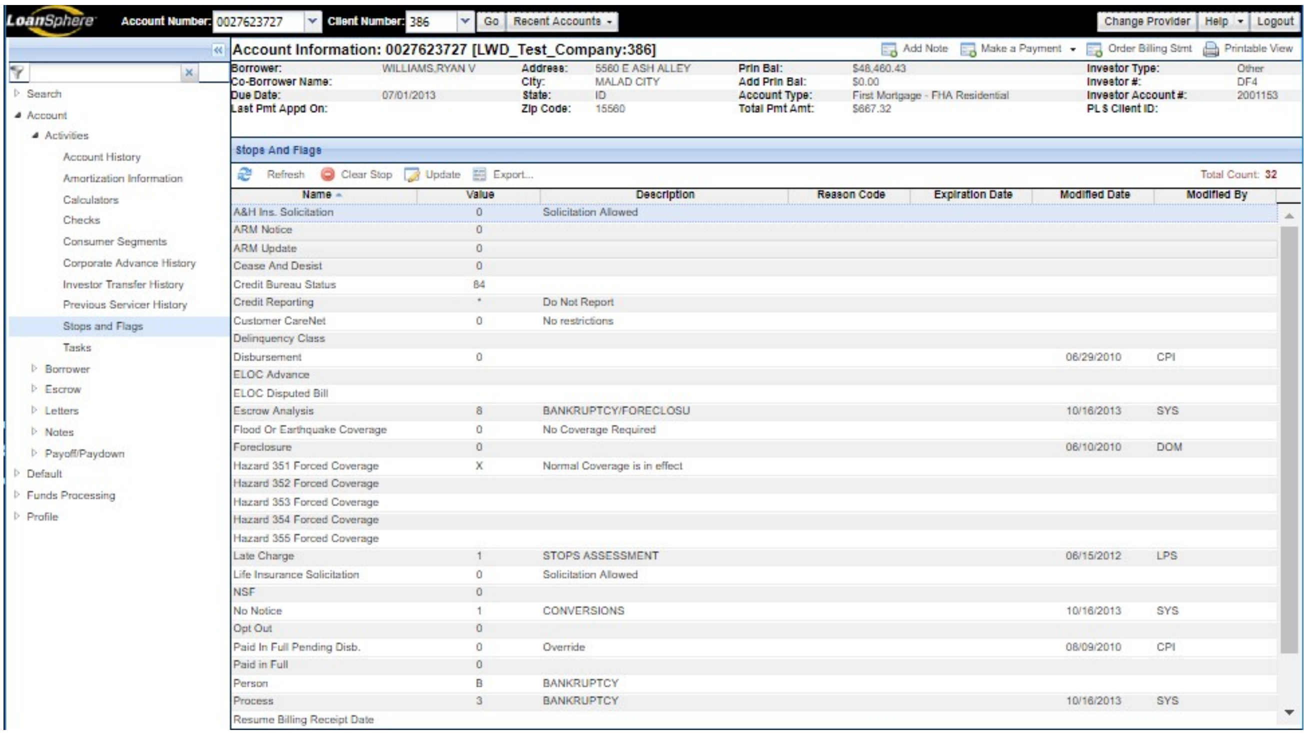
   The PDF Options window appears.
3. Type a name for the PDF file and select the appropriate rows and columns options.
4. Do the following as necessary:
   - To preview the PDF file, click Open.
   - To save the PDF file, click Save.
5. Click **OK**.

The Rows to View > Page option generates transactions in the PDF that are currently displayed in the view, based on any filters applied in the view. The Rows to View >All option generates all transactions in the PDF, regardless of any filters applied in the view.

6. Print, save, or close the PDF, as necessary.

Stops and Flags

The Stops and Flags view provides the ability to view and update stops and flag values associated with a loan.



Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Update a Stop Value

1 Click **Stops and Flags** in the navigation tree under Account >> Activities.

The Stops and Flags view appears.

1 Select a Stops and Flags line item.

2 Click **Update**.

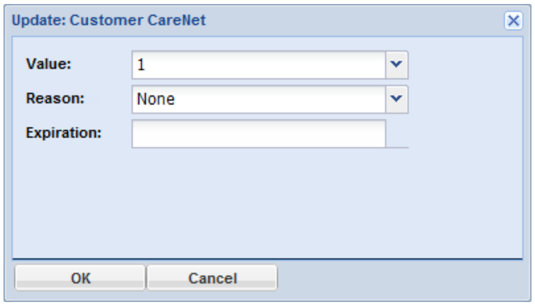
3 Enter or select the following as necessary:

- The stop or flag in the **Value** drop-down list

- The **Reason** code in the drop-down list
- An **Expiration** date (if applicable)

4 Click **OK**.

The Stops and Flags area displays the result of the update.



Clear a Stop Value

1 Click **Stops and Flags** in the navigation tree under Account >> Activities.

The Stops and Flags view appears.

2 Select a Stops and Flags line item.

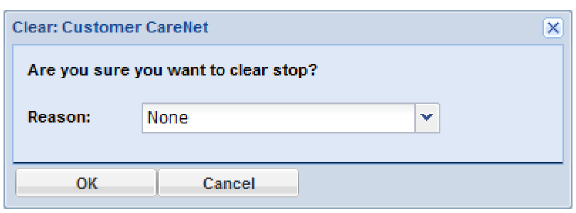
3 Click **Clear Stop**.

The Clear [Stop] dialog displays.

4 Select a **Reason** code from the drop-down list.

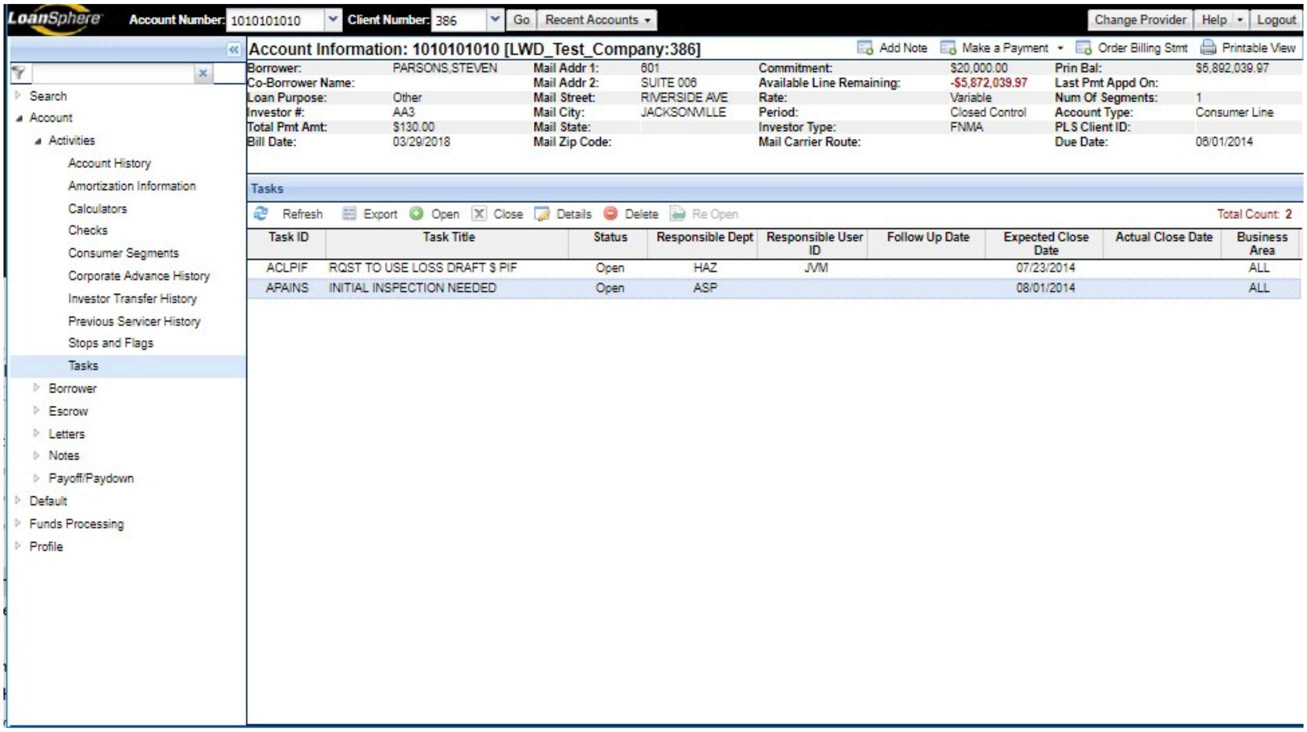
5 Click **OK**.

The stop is cleared for the account.



Tasks

The Tasks view displays a list of tasks associated with a loan. You also have the ability to open, update, close, delete and re-open tasks.



Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Tasks (Open a Task)

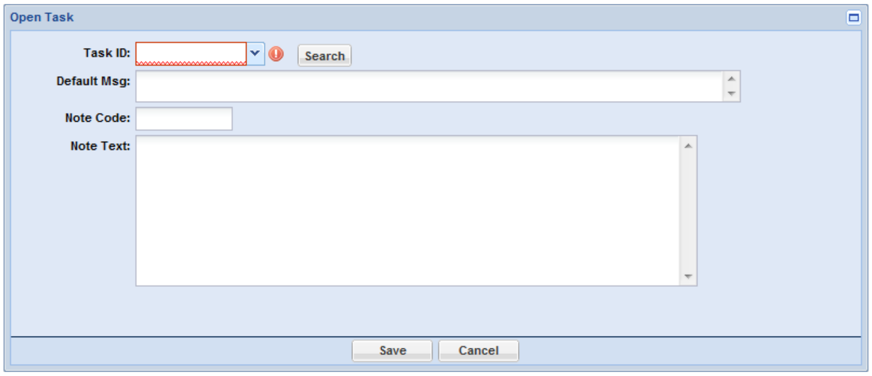
1 Click **Tasks** in the navigation tree under Account >> Activities.

The Tasks view appears.

2 Click **Open**.

The Open Task dialog box appears.

3 Complete the fields.

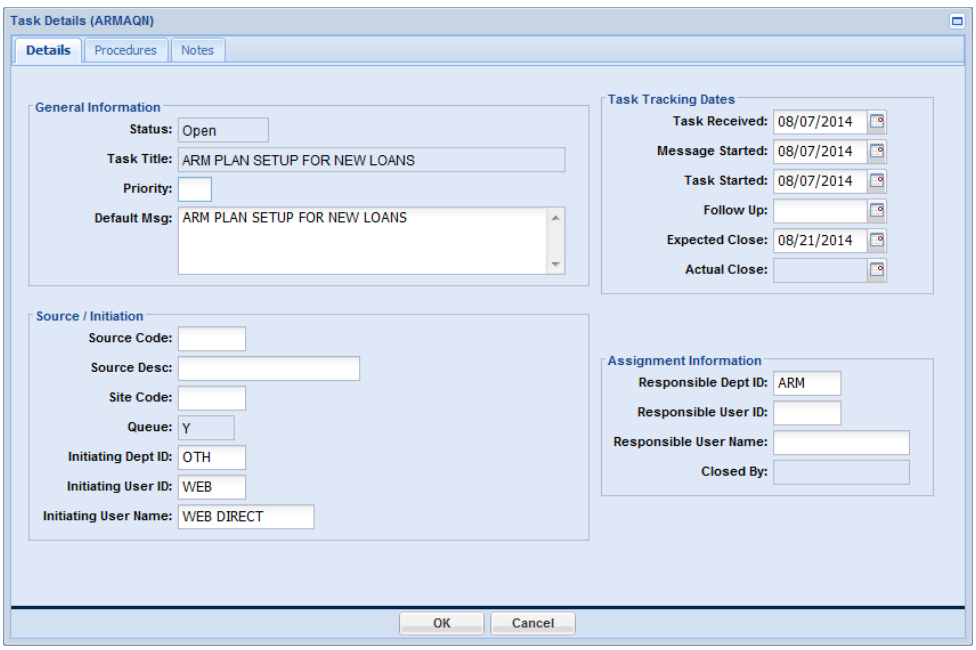


4 Click **Save**.

The Details tab of the Task Detail window appears.

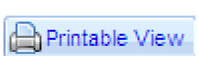
5 Complete the fields as necessary and click **OK**.

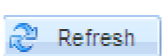
6 Repeat these steps on the remaining tabs.



Tips:

- The 

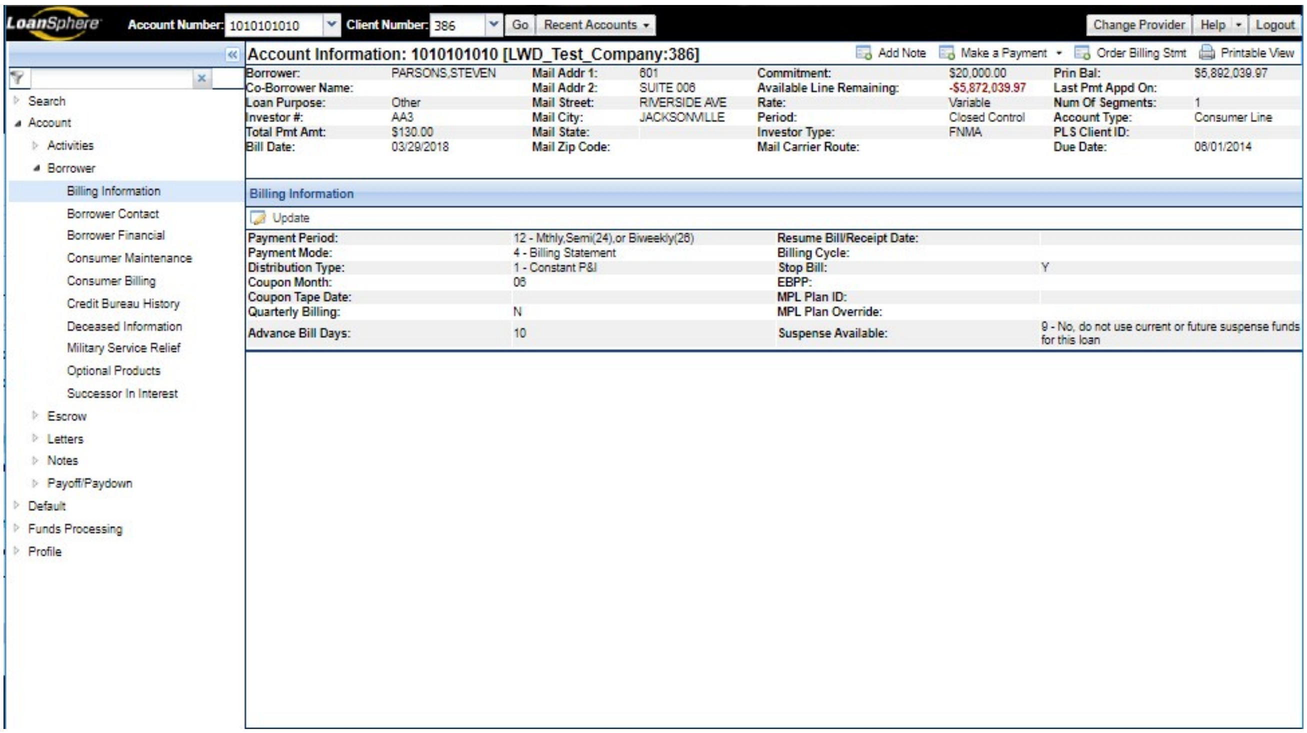
button enables you to export the information from the grid to an Excel spreadsheet.
- The 

feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The 

button restores the default values.Borrower

Billing Information

Billing Information enables you to view, export, and update borrower billing information in Web Direct.



View Borrower Billing Information

1. Search for a loan.
2. Click **Billing Information** in the navigation tree under Account **>>** Borrower**.**

   The Billing Information view appears.

Update Borrower Billing Information

1. Click **Billing Information** in the navigation tree under Account **>>** Borrower**.**

   The borrower's billing information appears in the right pane.
2. Click **Update**.

   The Update Billing Information dialog box appears.
3. Complete the fields.
4. Click **Save**.

Tips:

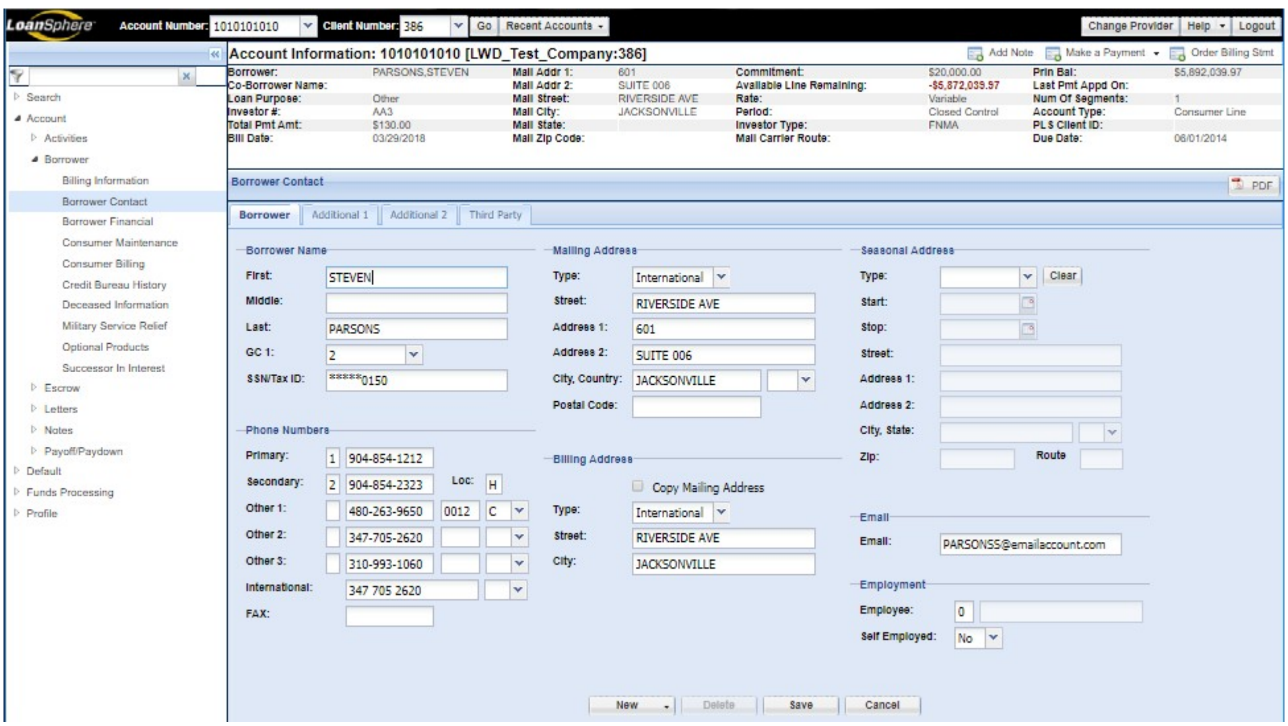
- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.

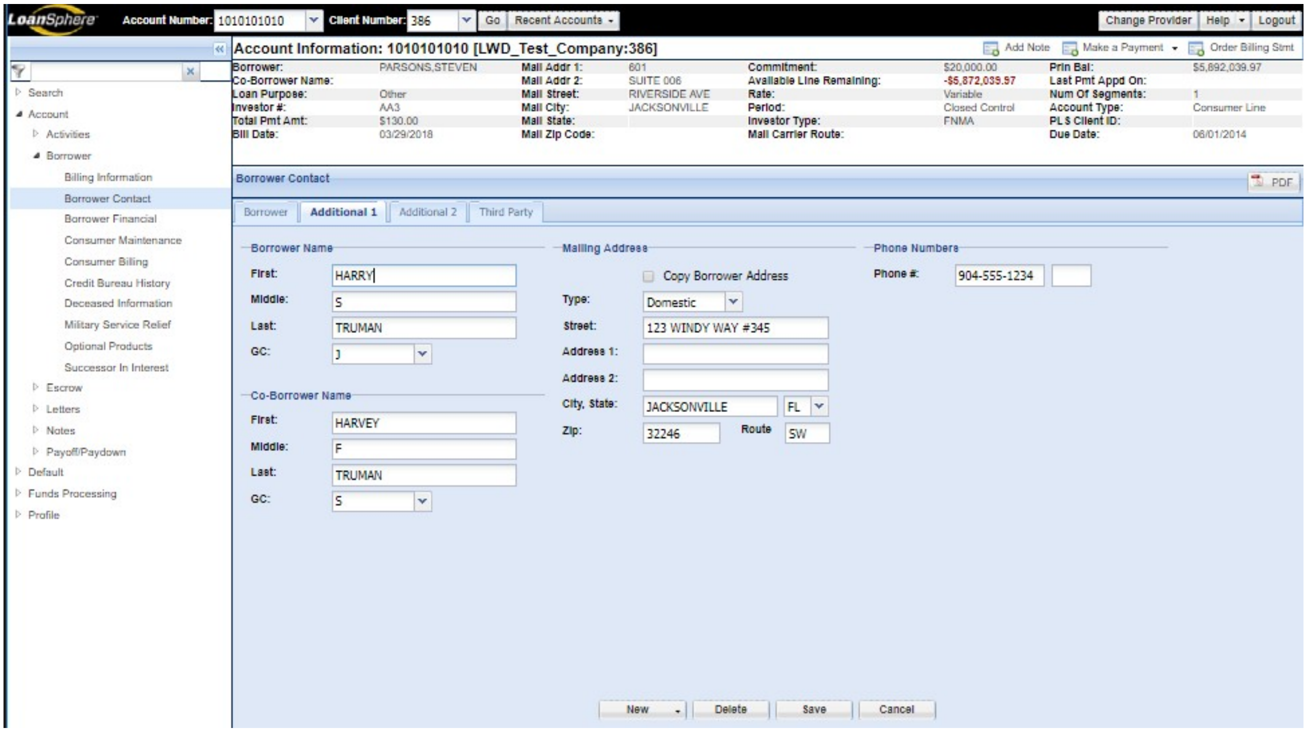
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Borrower Contact

Borrower Contact enables users to view and update contact information for the borrower, co-borrower, and up to nine additional borrowers. Users can copy the Mailing Address to the Billing Address.

Sensitive information such as borrower/co-borrower name(s) are restricted for update by users with an authorized privilege. All other information associated with the borrower contact functional area is controlled by a separate privilege.





Add New Borrower Contacts

1. Click **Borrower Contact** in the navigation tree under Account >> Borrower.

   The borrower's contact information appears.

2. At the bottom of the Borrower Contact page, click **New**.
3. In the **New** drop-down list, click the borrower contact type.
4. On the Co-Borrower, Additional (1-9), or Third Party tab, complete the fields.
5. Click **Save**.

Update Borrower Contact Information

1. Click **Borrower Contact** in the navigation tree under Account >> Borrower.

   The borrower's contact information appears in the right pane.

2. Select the tab for the Borrower, Co-Borrower, Additional (1-9), or Third Party.
3. On the appropriate borrower contact page, complete the fields.
4. Click **Save**.

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Generate Borrower Contact Information to PDF

1. Click **Borrower Contact** in the navigation tree under Account >> Borrower.

   The borrower's contact information appears in the right pane.

2. Click **PDF**.

   The File Download dialog box appears.

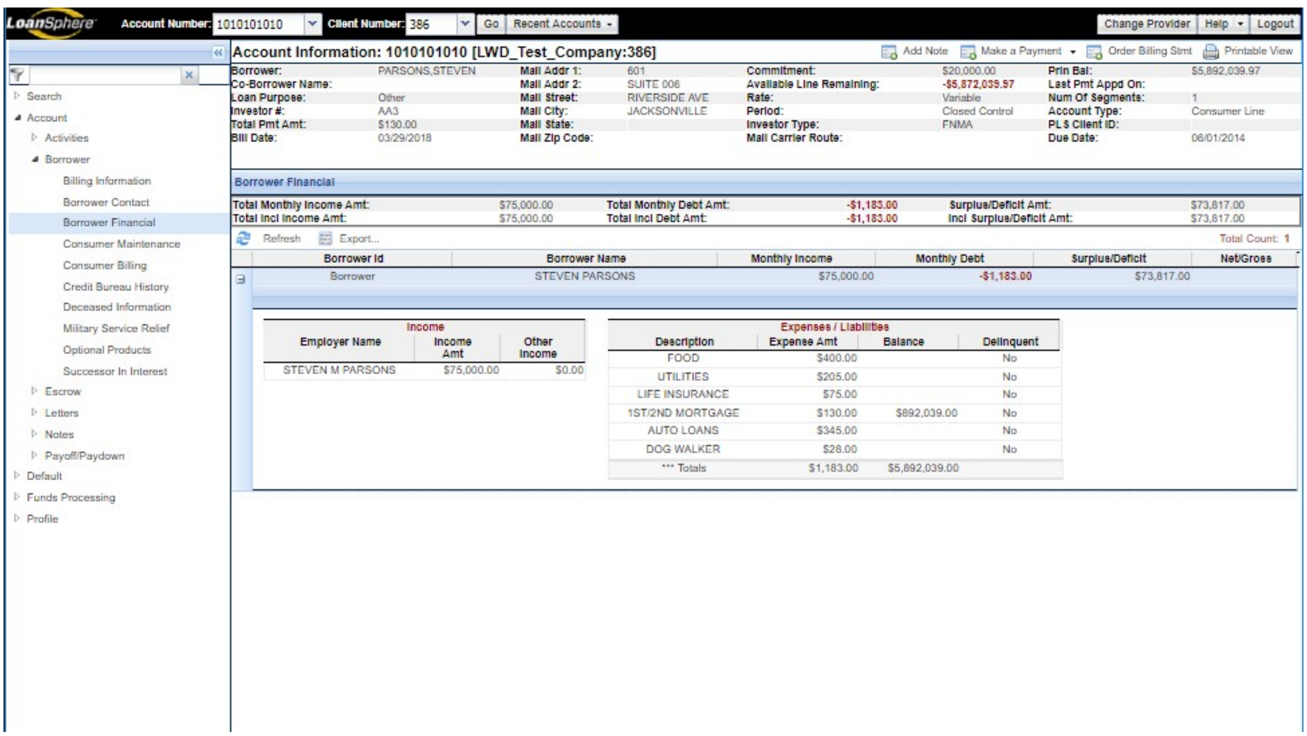
3. Do one of the following:

   - To preview the PDF file, click **Open**.
   - To save the PDF file, click **Save**.

4. Print, save, or close the PDF, as necessary.

Borrower Financial

Borrower Financial view displays the latest financial information on borrowers and co-borrowers. Examples of income and expense information available include employer, monthly income, net and gross income, loans and other debts, and living expenses.

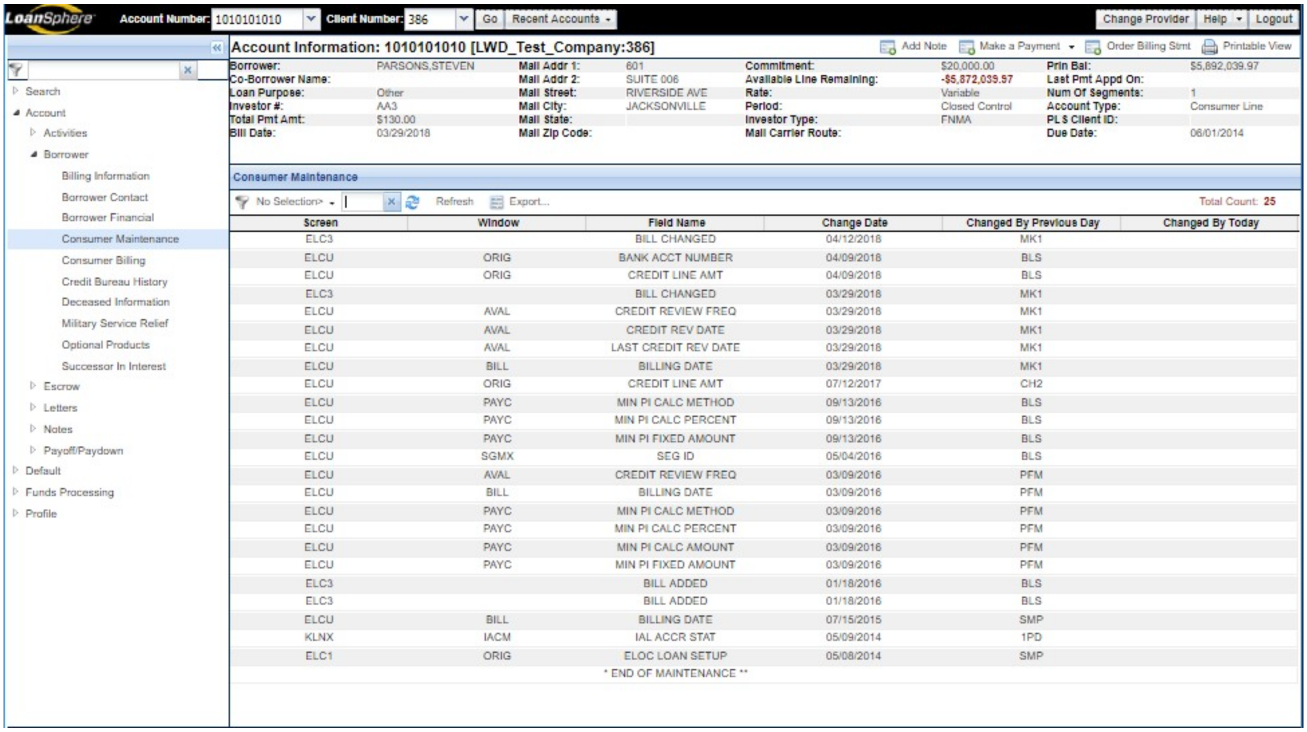


Tips:

- The **Export** button enables you to export the information from the grid to an Excel spreadsheet.
- The **Printable View** feature enables you to print the view in its entirety in a user-friendly manner.

Consumer Maintenance

The Consumer Maintenance view displays information about maintenance activity performed on active consumer loans, including the date maintenance, was performed, who performed the maintenance, and the screen/window where the maintenance occurred.



To filter only the information you want to view:

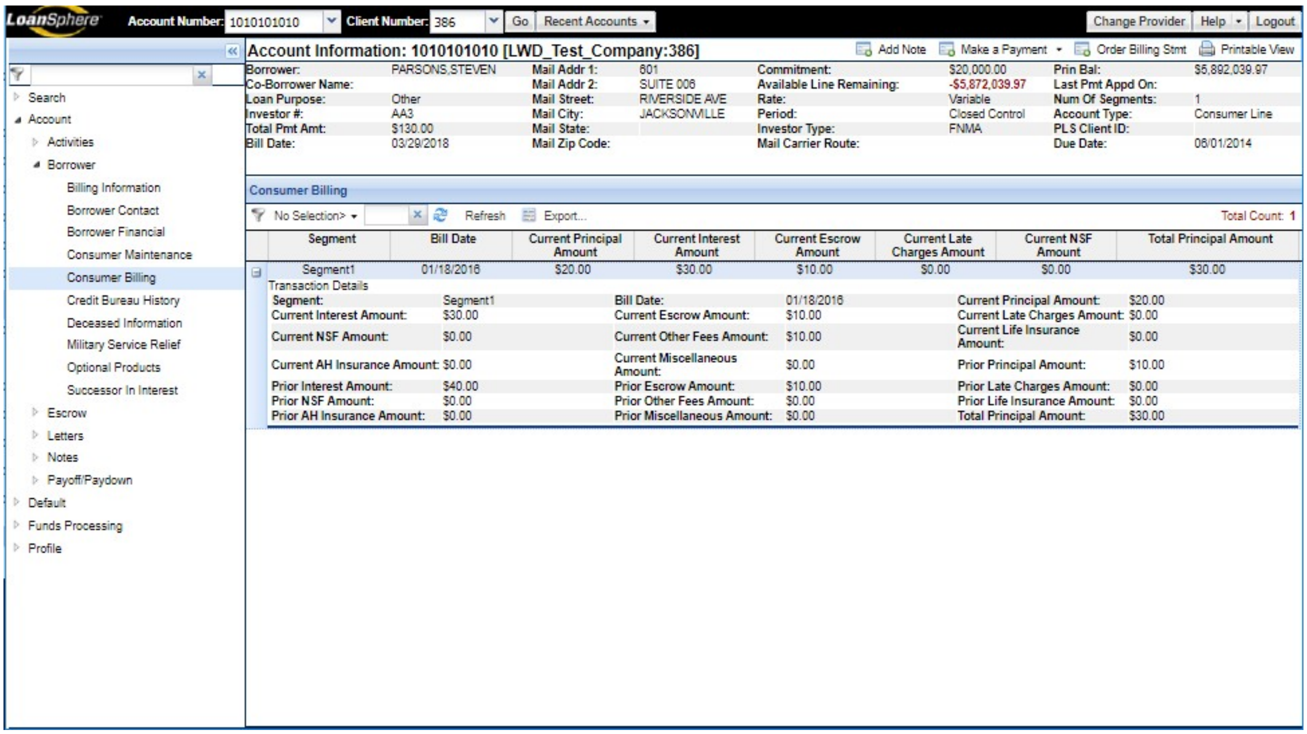
1. Click No Selection> and choose the field you want to filter.
2. Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Consumer Billing

The Consumer Billing view displays consumer billing information on unpaid bills, including billing dates and payment amounts.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

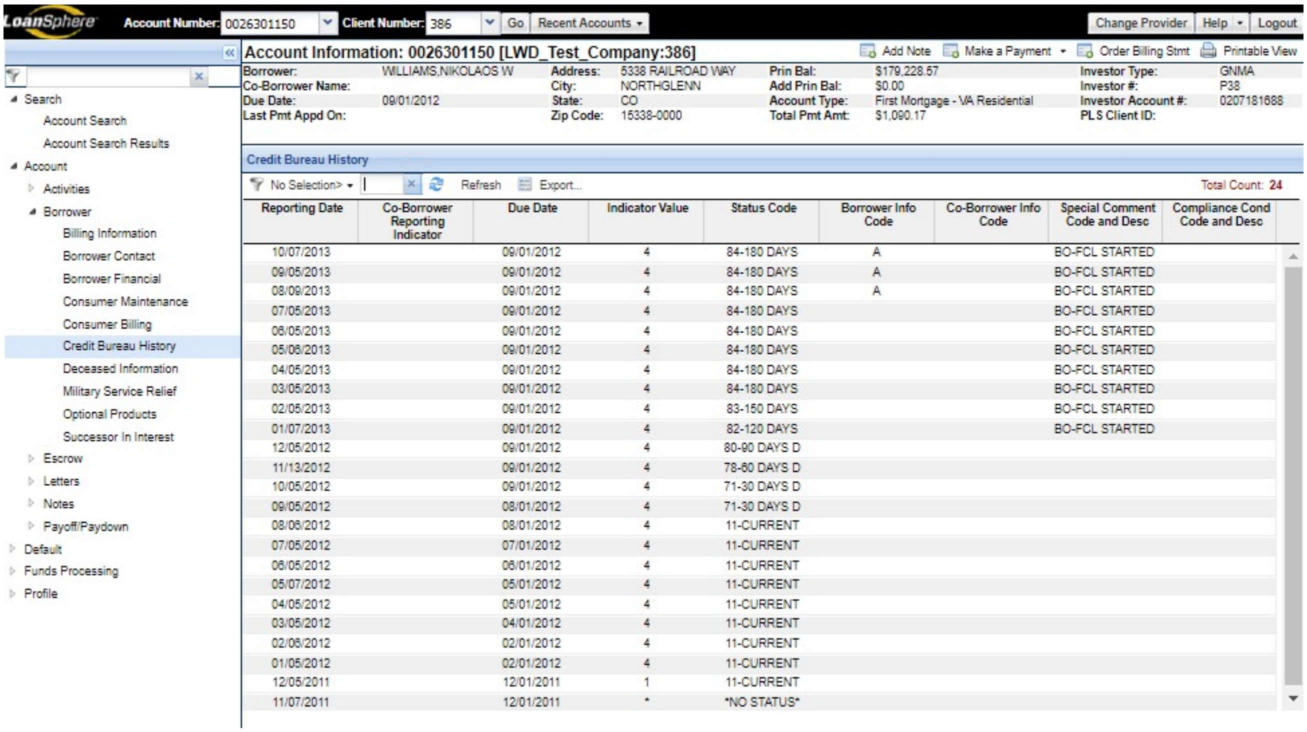
2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Credit Bureau History

The Credit Bureau History view displays the last 24 occurrences of loan-level credit bureau reporting data on individual loans.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

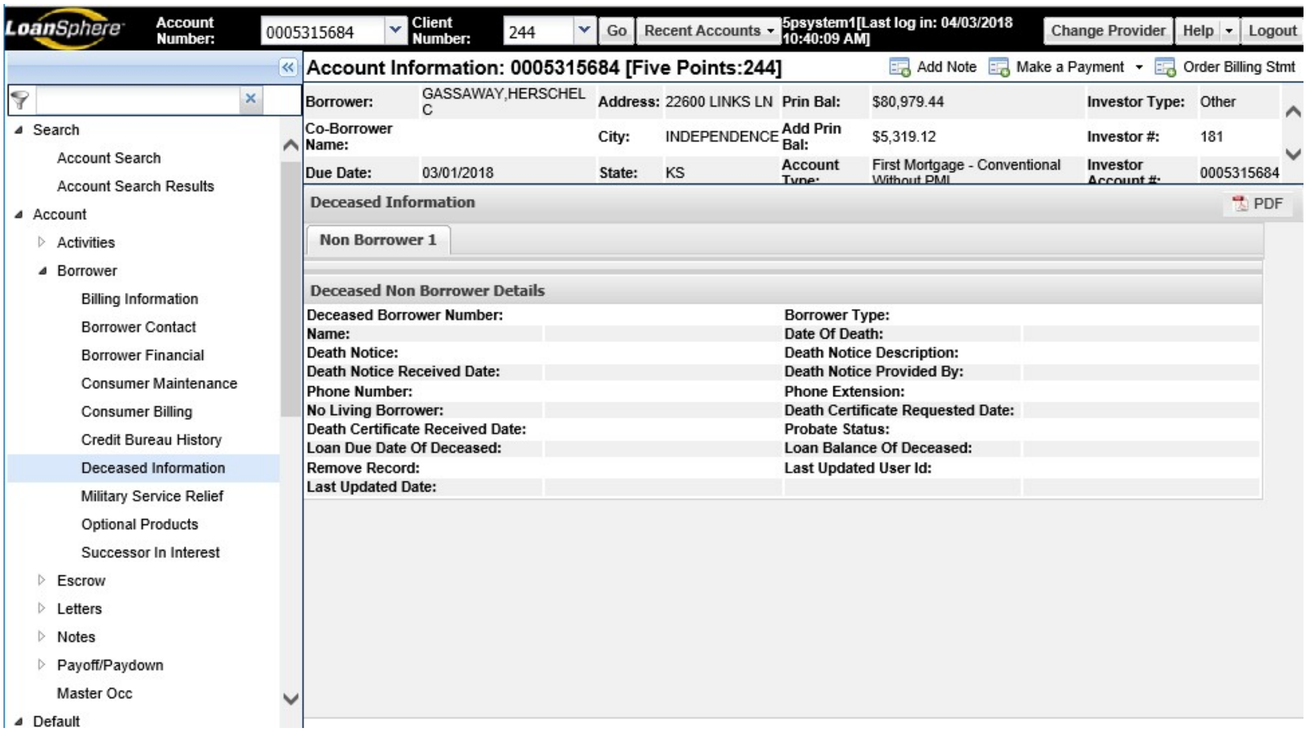
2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Deceased Information

The Deceased Information view displays information to view up to eight non-borrowers.



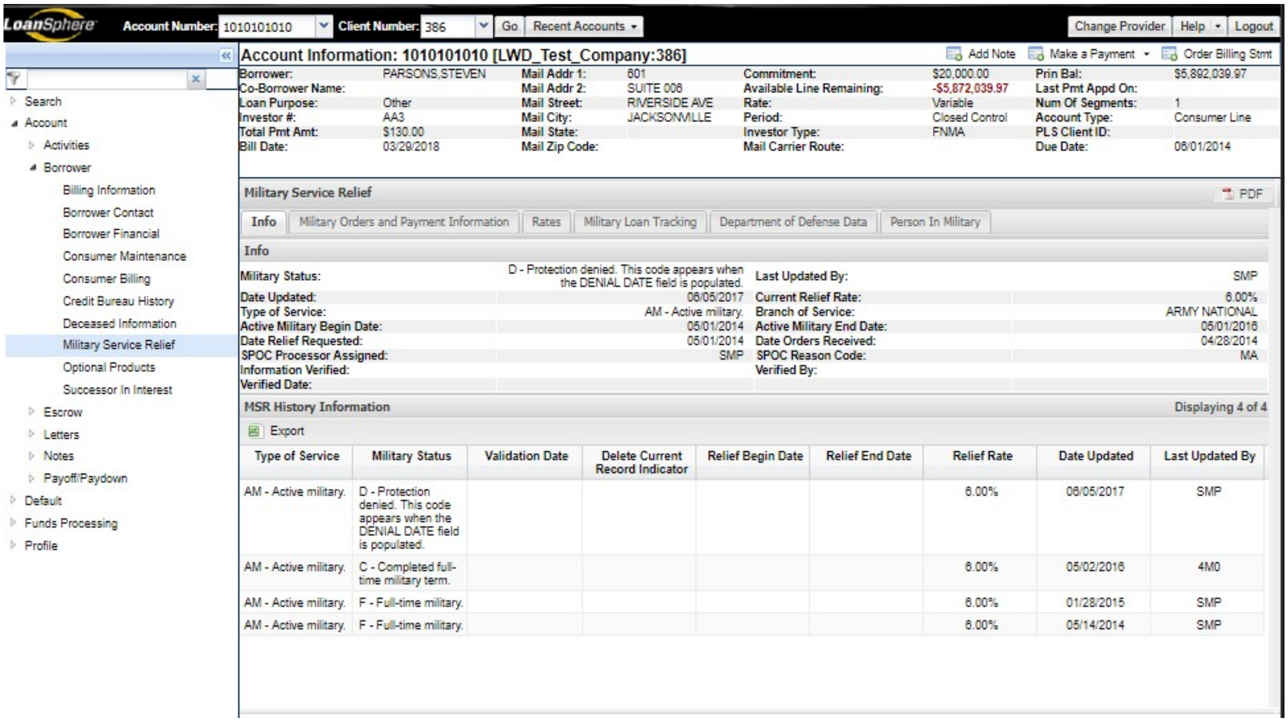
Generate Deceased Information to PDF

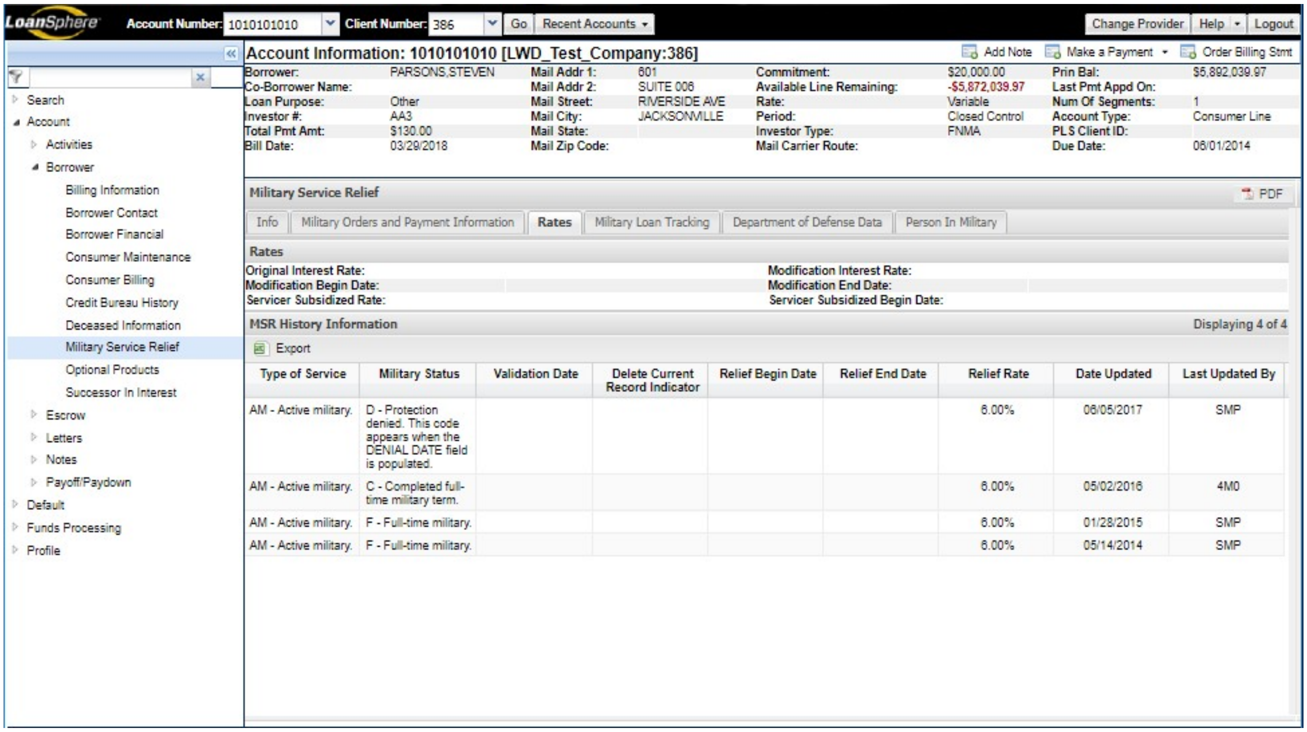
1. Open the Deceased Information view.
2. Click **PDF**.

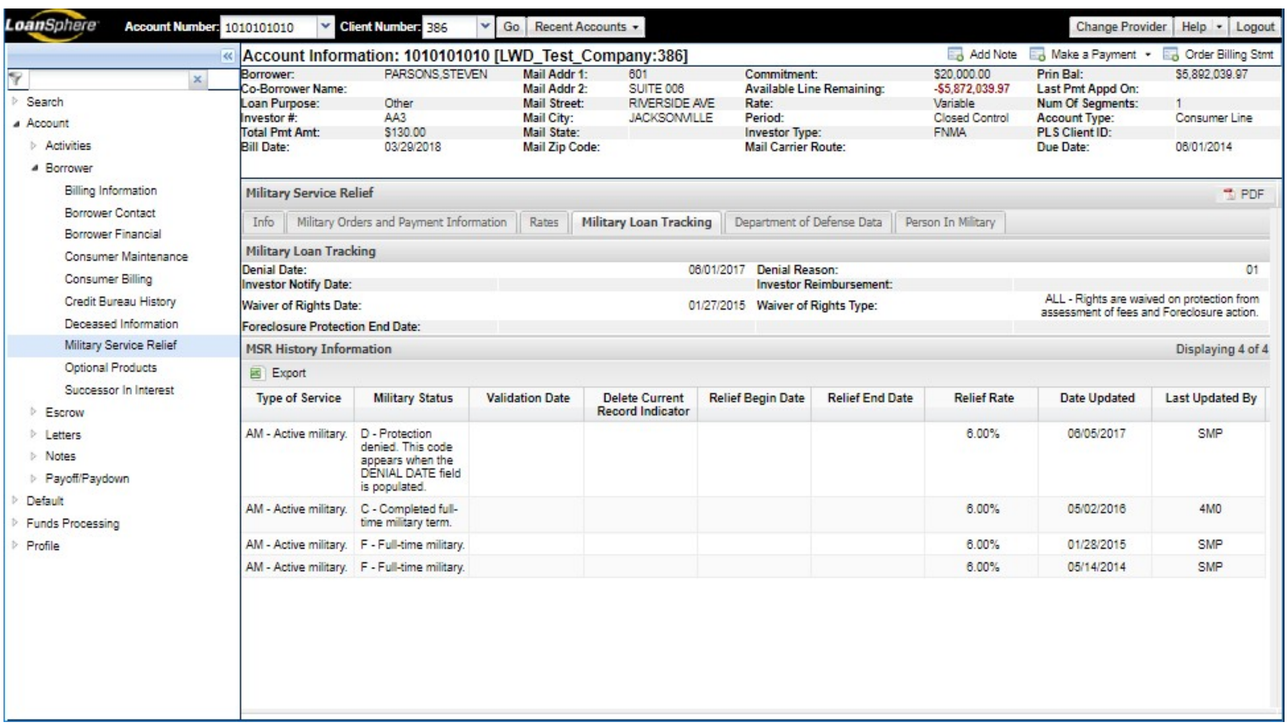
   The File Download dialog box appears.
3. Do one of the following:
   - To preview thePDF file, click **Open**.
   - To save the PDF file, click **Save**.
4. Print, save, or close the PDF, as necessary.

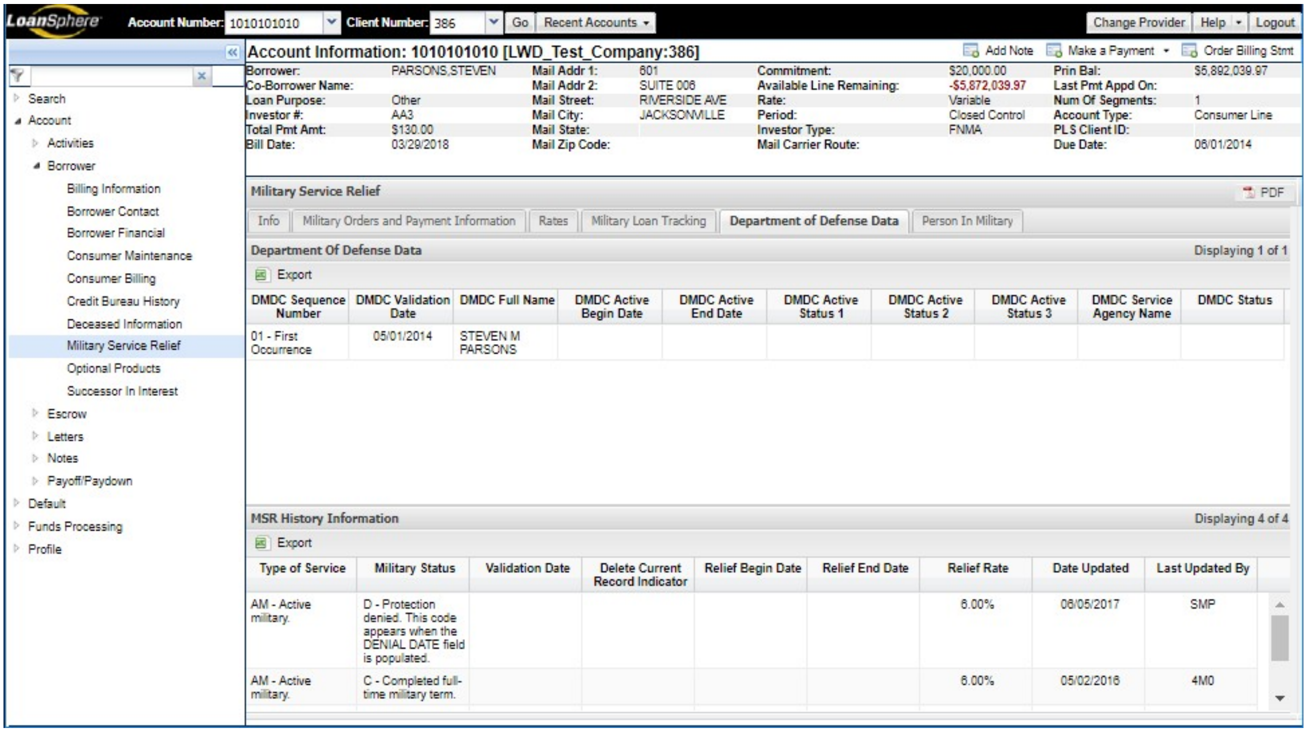
Military Service Relief

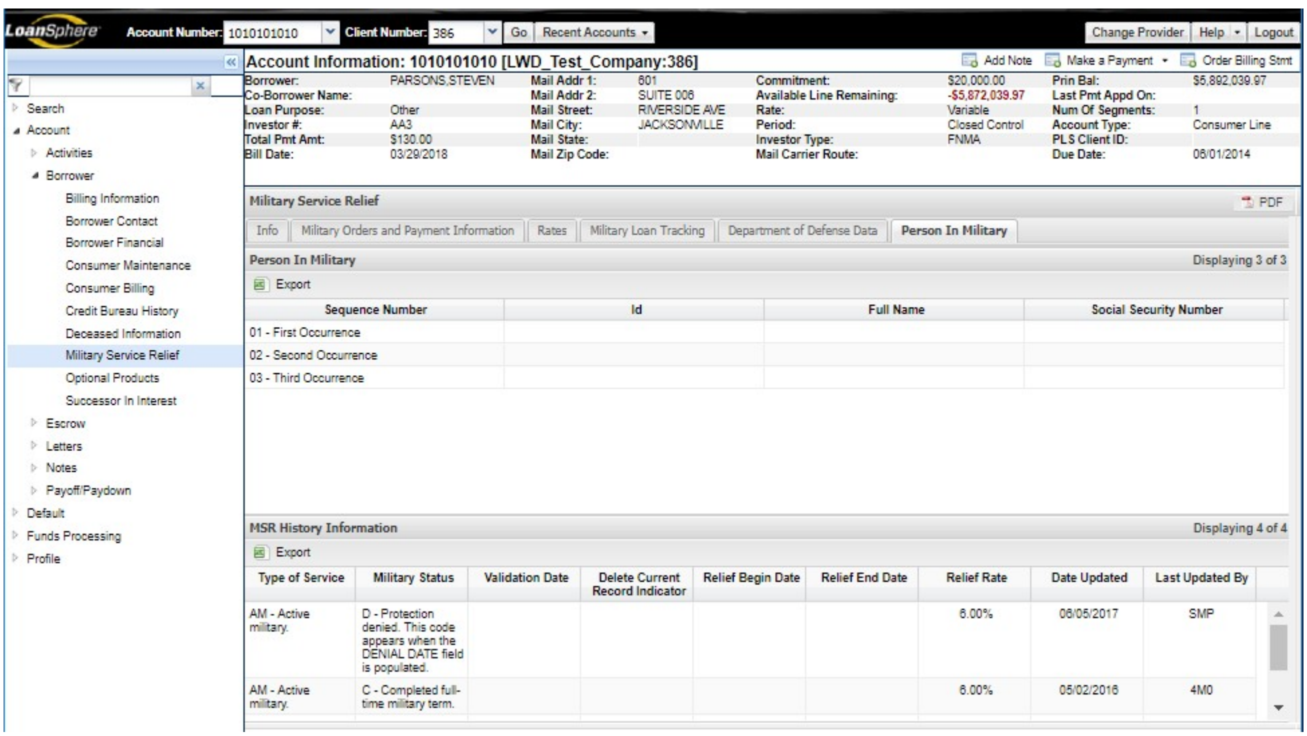
The Military Service Relief view enables you to view current Military Service Relief information and history. The Military Service Relief page displays information on six tabs: Info, Rates, Department of Defense Data, Military Loan Tracking, Military Orders and Payment Information, and Person In Military.




LoanSphere
Account Number: 1010101010
Client Number: 386
Go
Recent Accounts
Change Provider
Help
Logout
Account Information: 1010101010 [LWD_Test_Company:386]
Add Note
Make a Payment
Order Billing Stmt
Borrower: PARSONS,STEVEN
Co-Borrower Name:
Loan Purpose: Other
Investor #: AA3
Total Pmt Amt: $130.00
Bill Date: 03/29/2018
Mail Addr 1: 601
Mail Addr 2: SUITE 006
Mail Street: RIVERSIDE AVE
Mail City: JACKSONVILLE
Mail State:
Mail Zip Code:
Commitment: $20,000.00
Available Line Remaining: -$5,872,039.97
Rate: Variable
Period: Closed Control
Investor Type: FNMA
Mail Carrier Route:
Prin Bal: $5,892,039.97
Last Pmt Appd On:
Num Of Segments: 1
Account Type: Consumer Line
PLS Client ID:
Due Date: 06/01/2014
Search
Account
Activities
Borrower
Billing Information
Borrower Contact
Borrower Financial
Consumer Maintenance
Consumer Billing
Credit Bureau History
Deceased Information
Military Service Relief
Optional Products
Successor In Interest
Escrow
Letters
Notes
Payoff/Paydown
Default
Funds Processing
Profile
Military Service Relief
PDF
Info
Military Orders and Payment Information
Rates
Military Loan Tracking
Department of Defense Data
Person In Military
Rates
Original Interest Rate:
Modification Begin Date:
Servicer Subsidized Rate:
Modification Interest Rate:
Modification End Date:
Servicer Subsidized Begin Date:
MSR History Information
Displaying 4 of 4
Export
Type of Service | Military Status | Validation Date | Delete Current Record Indicator | Relief Begin Date | Relief End Date | Relief Rate | Date Updated | Last Updated By
AM - Active military. | D - Protection denied. This code appears when the DENIAL DATE field is populated. | 6.00% | 06/05/2017 | SMP
AM - Active military. | C - Completed full-time military term. | 6.00% | 05/02/2016 | 4M0
AM - Active military. | F - Full-time military. | 6.00% | 01/28/2015 | SMP
AM - Active military. | F - Full-time military. | 6.00% | 05/14/2014 | SMP


LoanSphere
Account Number: 1010101010
Client Number: 386
Go
Recent Accounts
Change Provider
Help
Logout
Account Information: 1010101010 [LWD_Test_Company:386]
Add Note
Make a Payment
Order Billing Stmt
Borrower: PARSONS,STEVEN
Co-Borrower Name:
Loan Purpose: Other
Investor #: AA3
Total Pmt Amt: $130.00
Bill Date: 03/29/2018
Mail Addr 1: 601
Mail Addr 2: SUITE 006
Mail Street: RIVERSIDE AVE
Mail City: JACKSONVILLE
Mail State:
Mail Zip Code:
Commitment: $20,000.00
Available Line Remaining: -$5,872,039.97
Rate: Variable
Period: Closed Control
Investor Type: FNMA
Mail Carrier Route:
Prin Bal: $5,892,039.97
Last Pmt Appd On:
Num Of Segments: 1
Account Type: Consumer Line
PLS Client ID:
Due Date: 06/01/2014
Search
Account
Activities
Borrower
Billing Information
Borrower Contact
Borrower Financial
Consumer Maintenance
Consumer Billing
Credit Bureau History
Deceased Information
Military Service Relief
Optional Products
Successor In Interest
Escrow
Letters
Notes
Payoff/Paydown
Default
Funds Processing
Profile
Military Service Relief
PDF
Info
Military Orders and Payment Information
Rates
Military Loan Tracking
Department of Defense Data
Person In Military
Military Loan Tracking
Denial Date: 06/01/2017
Denial Reason: 01
Investor Notify Date:
Investor Reimbursement:
Waiver of Rights Date: 01/27/2015
Waiver of Rights Type: ALL - Rights are waived on protection from assessment of fees and Foreclosure action.
Foreclosure Protection End Date:
MSR History Information
Displaying 4 of 4
Export
Type of Service | Military Status | Validation Date | Delete Current Record Indicator | Relief Begin Date | Relief End Date | Relief Rate | Date Updated | Last Updated By
AM - Active military. | D - Protection denied. This code appears when the DENIAL DATE field is populated. | 6.00% | 06/05/2017 | SMP
AM - Active military. | C - Completed full-time military term. | 6.00% | 05/02/2016 | 4M0
AM - Active military. | F - Full-time military. | 6.00% | 01/28/2015 | SMP
AM - Active military. | F - Full-time military. | 6.00% | 05/14/2014 | SMP





View Military Service Relief History

1 Click **Military Service Relief** in the navigation tree under Account >> Borrower.

The account's military service relief history appears in the right pane.

2 In the Military Service Relief section of the page, select the Info, Dates, or Rates tab, or view information in the MSR History Information section.

Export Military Service Relief History

1 Click **Military Service Relief** in the navigation tree under Account >>Borrower.

The account's military service relief history appears in the right pane.

2 In the MSR History Information section, click **Export**.

The Export Military Service Relief History box displays.

3 Modify the **File Name** field as desired.

4 Select the desired export format:

- Excel
- Standard

5 Click **OK**.

Generate a Military Service Relief to PDF

1 Click **Military Service Relief** in the navigation tree under Account >>Borrower.

The account's military service relief history appears in the right pane.

2 **Click PDF**.

The PDF Options window appears.

3 Type a **name** for the PDF file and select the appropriate rows and columns options.

4 Click **OK**.

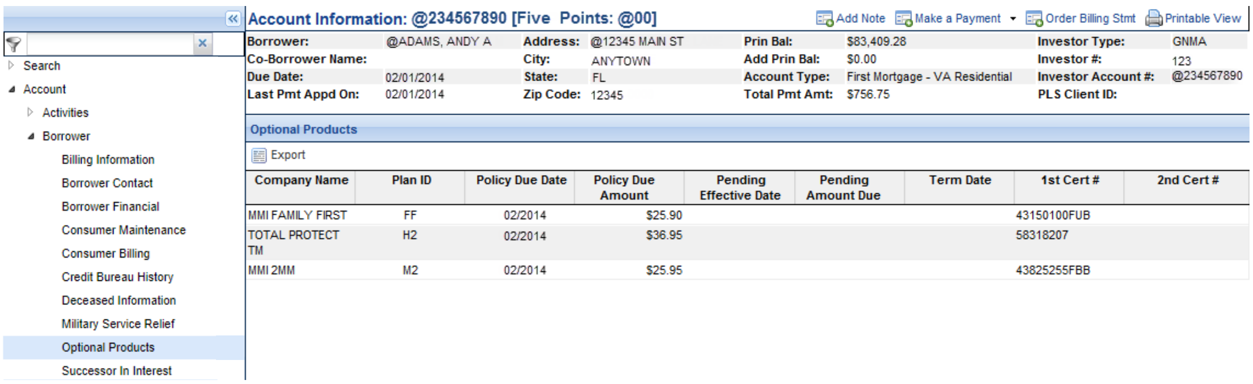
5 Do the following, as necessary.

- To preview the PDF file, click **Open.**
- To save the PDF file, click **Save.**

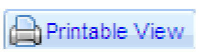
6 Print, save, or close the PDF, as necessary.

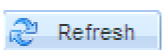
Optional Products

The Optional Products view displays information for up to 12 optional policies per loan. Optional products include life insurance policies, accident and health (A&H) policies, and other types of optional insurance policies.



Tips:

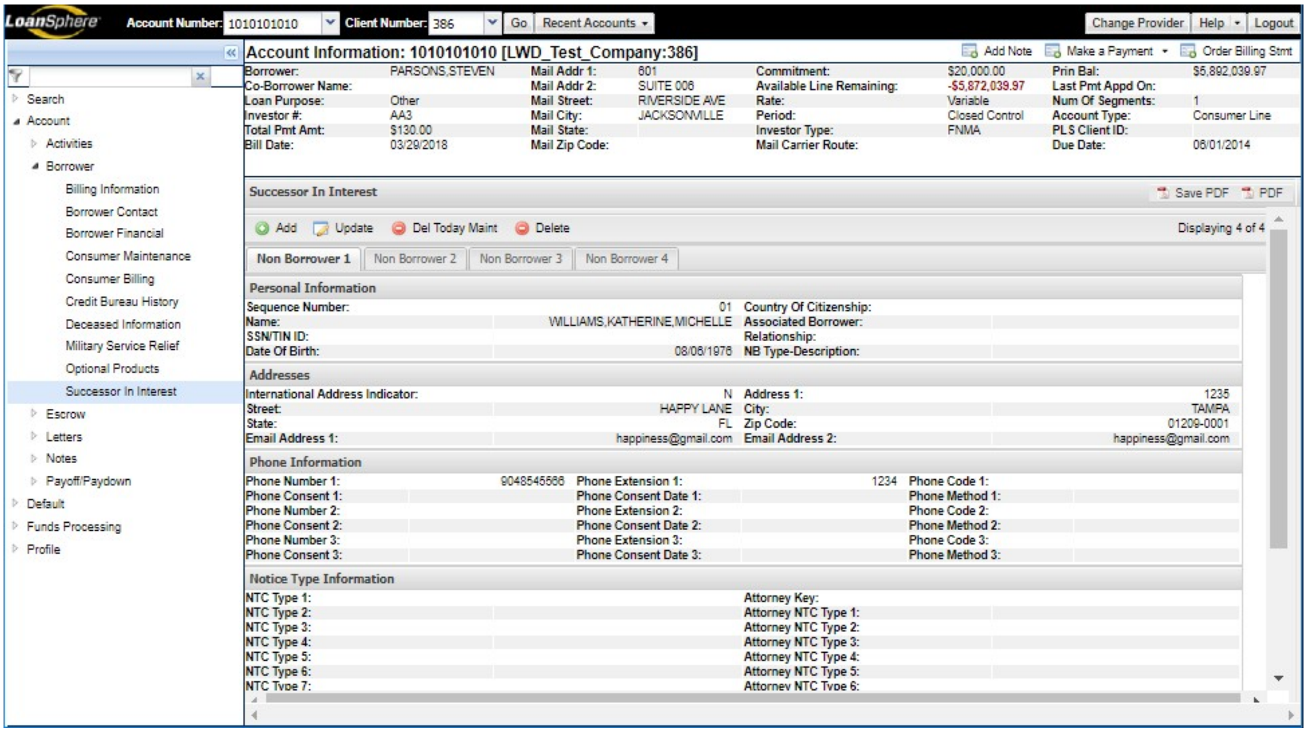
- The 

feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The 

button restores the default values.

Successor In Interest

Successor In Interest, accessible from Account >> Borrower in the navigation tree, enables you to view current mortgage-related, non-borrower information. The Successor In Interest page displays information on eight tabs, for up to eight non-borrowers. You must have the appropriate security privileges and permissions to view successor in interest information.



Add Successor In Insterest Information

1. Open the Successor In Interest view.
2. Click **Add**.

   The Add Non-Borrower dialog box appears.
3. Complete the fields.
4. Click **OK**.

   A confirmation message appears
5. Click **OK** to add the non-borrower.

Update Successor In Insterest Information

1. Open the Successor In Interest view.
2. Select the **Non-Borrower** tab you want to update.
3. Click **Update**.

   The Update Non-Borrower window appears.

4 Update the fields.

5 Click **OK**.

A confirmation message appears.

6 Click **OK**.

Delete Successor In Insterest Information Maintenance

1 Open the Successor In Interest view.

2 Select the Non-Borrower tab on which you want to delete from today's maintenance.

3 Click Sel Today Maint.

The Delete Today's Maintenance dialog box appears.

4 Click **OK**.

A confirmation message appears.

5 Click **OK**.

Delete Successor In Insterest Information

1 Open the Successor In Interest view.

2 Select the **Non-Borrower** tab you want to delete.

3 Click **Delete**.

4 Click **OK**.

A confirmation message appears.

5 Click **OK**.

Generation Successor In Insterest Information to PDF

1 Open the Successor In Interest view.

2 Click PDF.

The File Download dialog box appears.

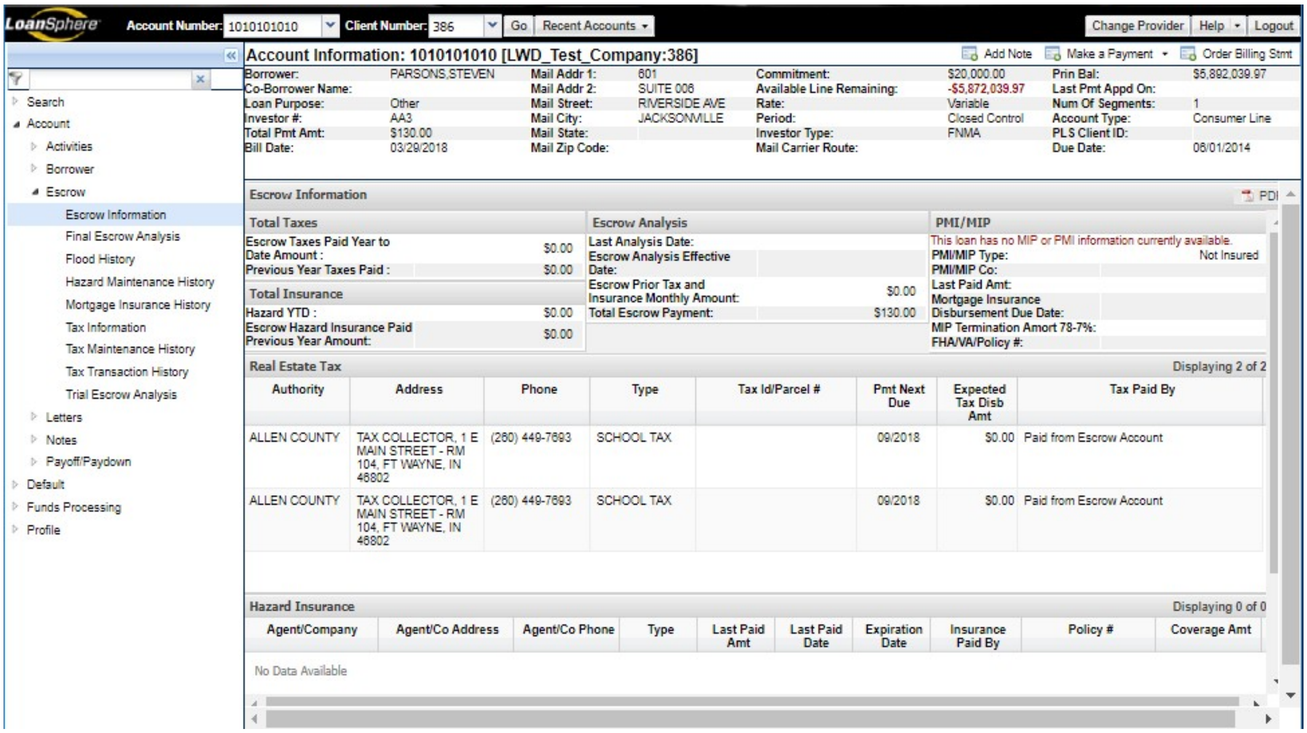
3 Do one of the following:

- To preview the PDF file, click Open.
- To save the PDF file, click Save.

4 Print, save, or close the PDF, as necessary. Escrow

Escrow Information

The Escrow Information view provides general escrow information from all escrow areas, including real estate taxes, hazard insurance, MIP/PMI, and escrow analysis.



Generate Escrow Information to PDF

1. Search for an account.
2. Click **Escrow Information** in the navigation tree under Account >> Escrow.

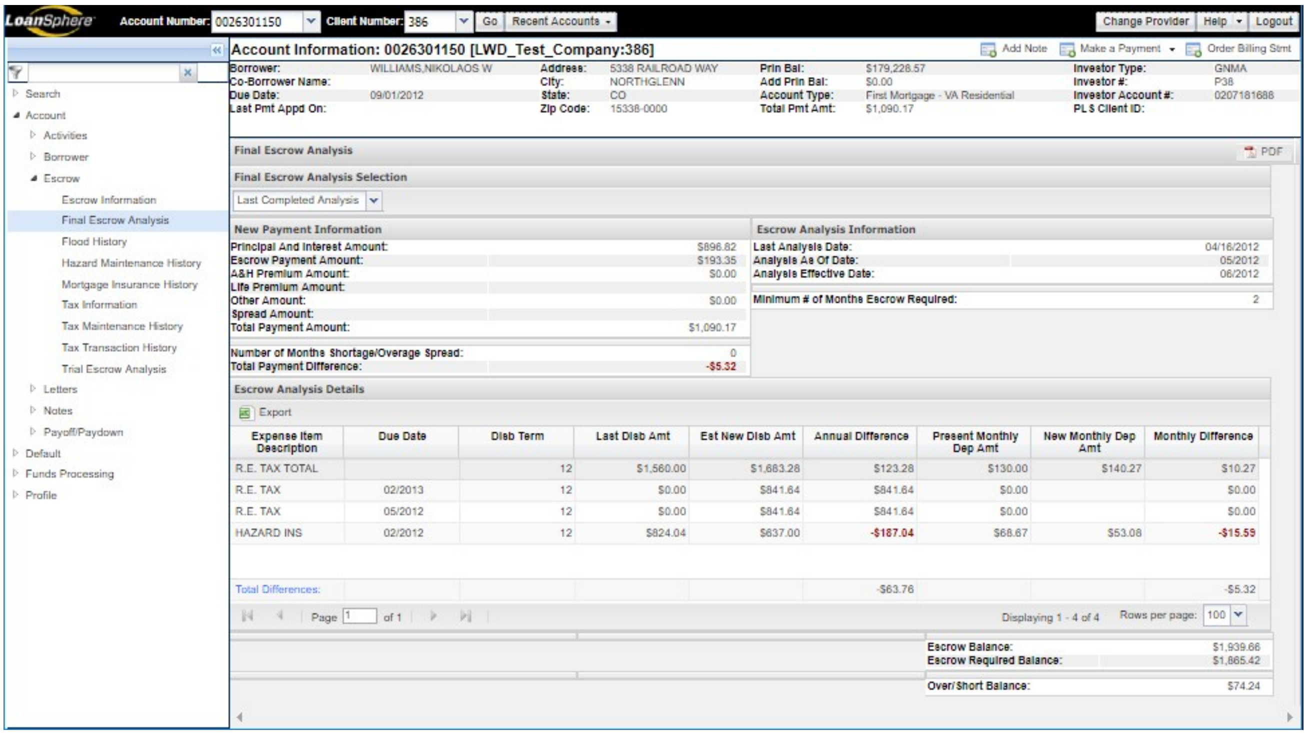
   The Escrow Information page appears.
3. Click **PDF**.

   The File Download dialog box appears.
4. Do one of the following:
   - To preview the PDF file, click **Open**.
   - To save the PDF file, click **Save**.
5. Print, save, or close the PDF, as necessary.

Final Escrow Analysis

Final Escrow Analysis enables users to view, export, and generate a PDF for all final escrowanalysis information for an account.

You can view up to nine escrow analyses within a three year range, ranging from the oldest analysis to the most recent analysis. If you attempt to view an analysis that does not exist within the three-year range or if the account does not have a corresponding analysis, no escrow analysis results appear.



Tip:

- Click the right side of any column header to change the view's sort.

Export Final Escrow Analysis

1 Open the Final Escrow Analysis view for a loan.

2 Click **Export**.

The Export dialog box displays.

3 Type a name for the export file and select the appropriate format.

4 Click **OK**.

5 Do the following, as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

Web Direct saves or displays the exported file with the final escrow analysis information.

Generate Final Escrow Analysis to PDF

1 Open the Final Escrow Analysis view for a loan.

2 Click **PDF**.

The File Download dialog box appears.

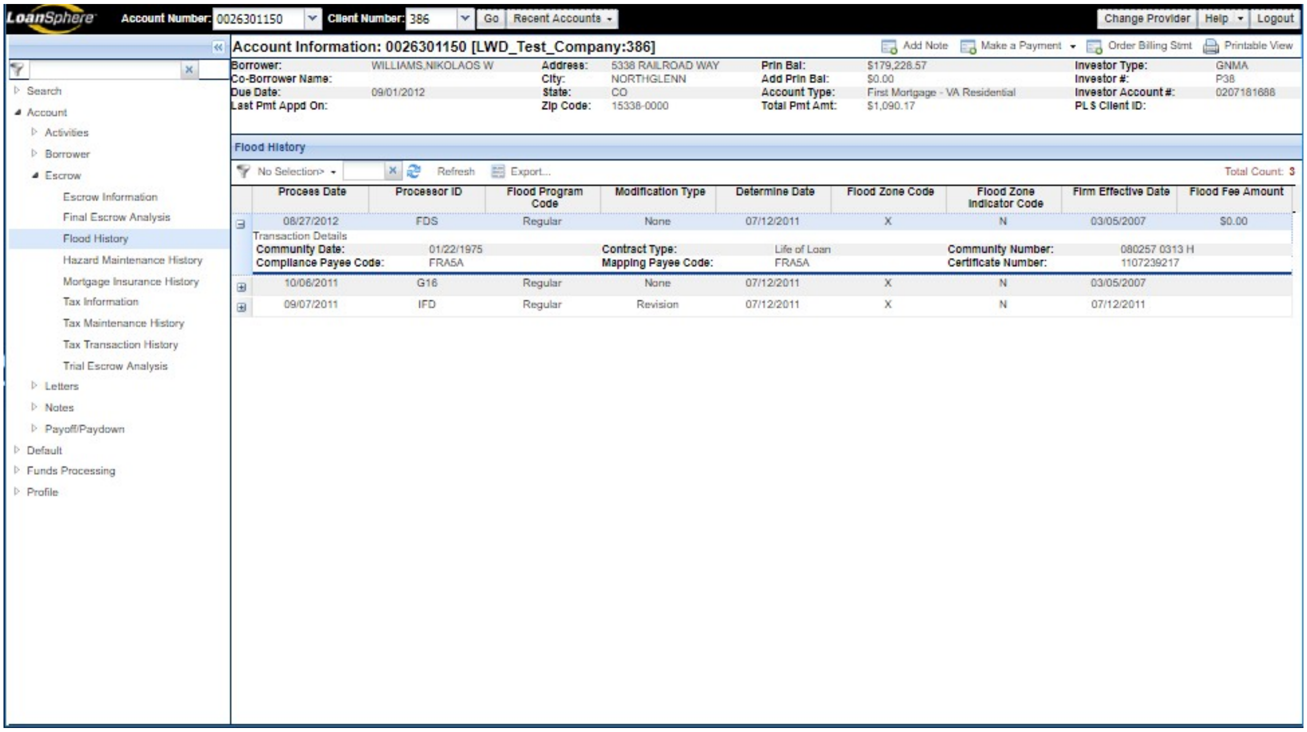
3 Do one of the following:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

4 Print, save, or close the PDF, as necessary.

Flood History

Flood History enables users to view and export flood history information on an account.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

2 Click Refresh and all other transactions are filtered out of the view.

The view defaults to the last 12 months of activity.

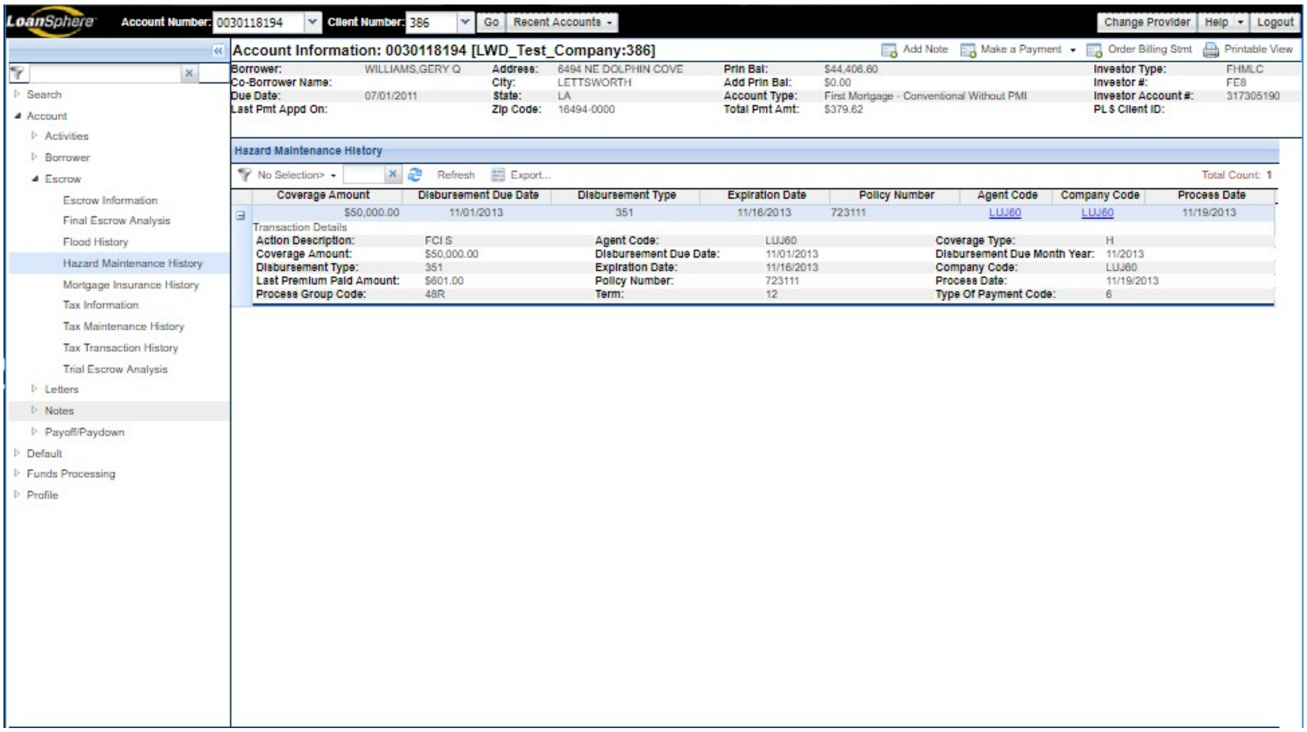
To view additional activity or to view activity for a certain time frame, change the start and end dates.

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Hazard Maintenance History

The Hazard Maintenance History view displays loan maintenance history for the 16 most recent transactions on an individual loan.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

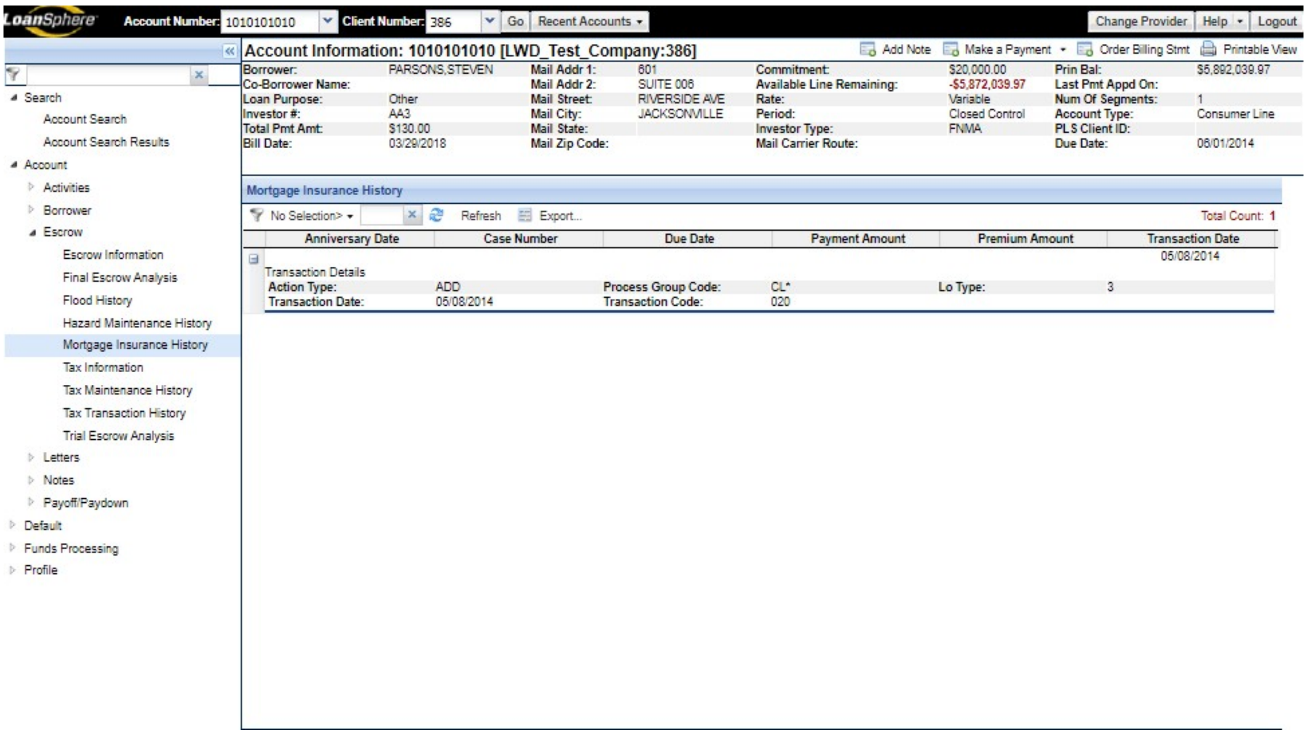
2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Mortgage Insurance History

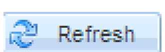
The Mortgage Insurance History view displays MIP, PMI, and VA loan guaranty information on an individual loan.



To filter only the information you want to view:

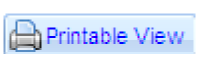
1 Click 

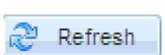
and choose the field you want to filter.

2 Click 

and all other transactions are filtered out of the view.

Tips:

- The 

feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The 

button restores the default values.

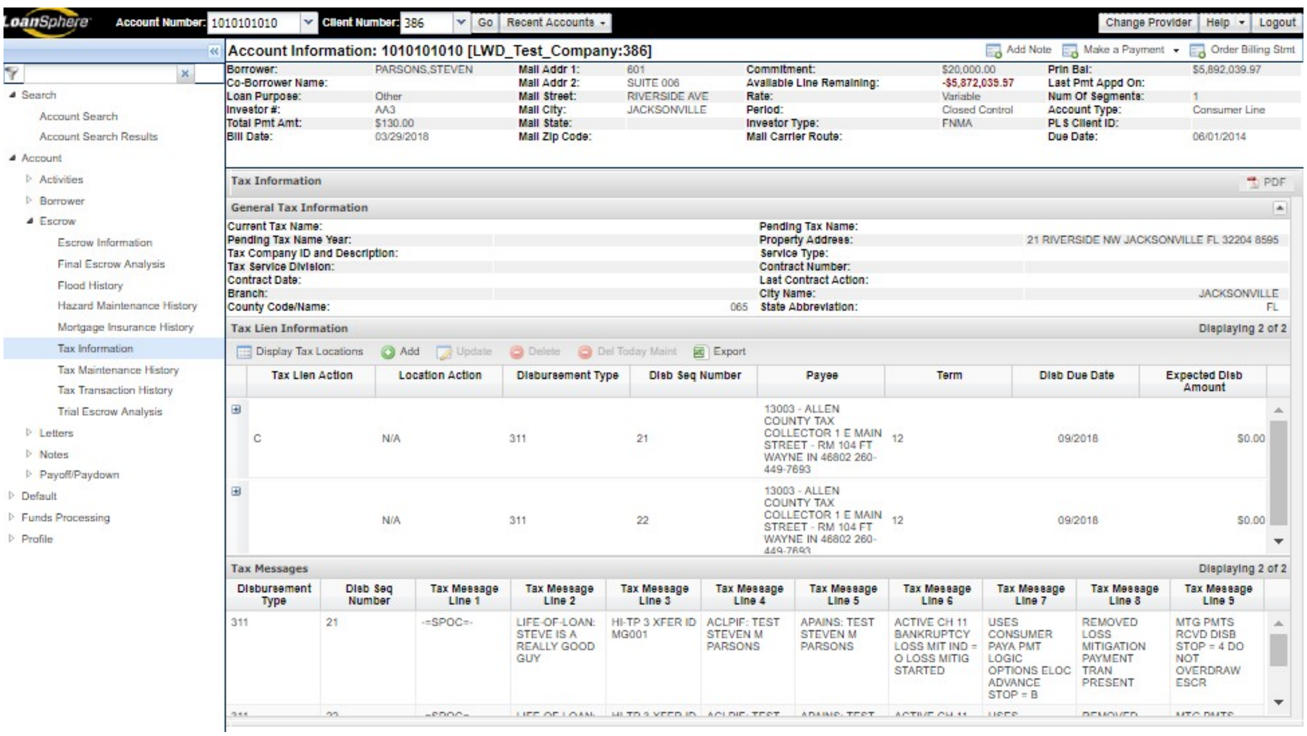
Tax Information

The Tax Information view enables you to view tax lien information from TAX1 and TAX2/MAIN. You can also add, update, delete and export tax lien information and view tax lien-related messages associated with the loan.

You must have the appropriate privileges and permission to view, update, add, delete, or export tax lien information, or to delete tax maintenance for today.

If a tax lien has an action code of Add, Update, or Delete, then the Delete function is disabled. If the Tax Lien Action code equals Delete, then the Update function is disabled.

After tax lien updates have been made in MSP, you must click **Go** in the Tax Information view to refresh the Tax Messages.



Add Tax Lien Information

1. Open the Tax Information view.
2. Click **Add**.

   The Add Tax Lien dialog box appears.
3. Complete the fields.
4. Click **OK**.

   The new tax lien data is saved and it appears on the Tax Information window.

Export Tax Lien Information

1. Open the Tax Information view.
2. Click **Export**.

   The Export dialog box displays.
3. Type a name for the export file and select the appropriate format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

   Web Direct saves or displays the exported file with the tax lien information.

Generate Tax Lien Information to PDF

1. Open the Tax Information view.
2. Click **PDF**.

   The File Download dialog box appears.
3. Do the following, as necessary:
   - To preview the PDF file, click **Open**.
   - To save the PDF file, click **Save**.
4. Print, save, or close the PDF, as necessary.

Update Tax Lien Information

1. Open the Tax Information view.
2. In the Tax Lien Information section, select the row of tax lien information you want to update.
3. Click **Update**.

   The Update Tax Lien dialog box appears.
4. Complete the fields.
5. Click **OK**.

   The updated tax lien data is saved and it appears on the Tax Information window.

Delete Tax Lien Information

1. Open the Tax Information view.
2. In the Tax Lien Information section, select the row of tax lien information you want to delete.
3. Click **Delete**.

The Delete button is disabled for items with tax lien action code of Add, Update, or Delete.

A confirmation message appears.

4 Click **OK**.

The tax lien entry is removed from the Tax Lien Information section.

Delete Today's Tax Lien Maintenance

The following procedure enables you to delete shadow-posted maintenance that was made today.

1 Open the Tax Information view.

2 In the Tax Lien Information section, select the row of the tax lien maintenance you want to delete.

3 Click **Del Today Maint**.

A confirmation message appears.

4 Click **OK** to delete the maintenance item.

Another confirmation message appears indicating that the maintenance item was deleted and the tax lien maintenance is removed from the Tax Lien Information section.

View Tax Locations

1 Search for an account.

2 Click Tax Information in the navigation tree under Account >> Escrow.

The Tax Information page appears.

3 View the fields.

4 Click Display Tax Locations.

The Display Tax Location page appears.

- To continue working on the selected loan, make a different selection from the navigation tree.
- Click **Account Search Results** in the navigation tree under Search to return to the search results.
- Search for an account.

Display Tax Locations

1 Open the Tax Information view.

2 In the Tax Lien Information grid, select the row of tax lien information you want to delete.

3 Click **Delete**.

The Delete Tax Lien window appears.

4 Select the item you want to delete.

You have the option to delete Lien, Location, or both.

5 Click **OK**.

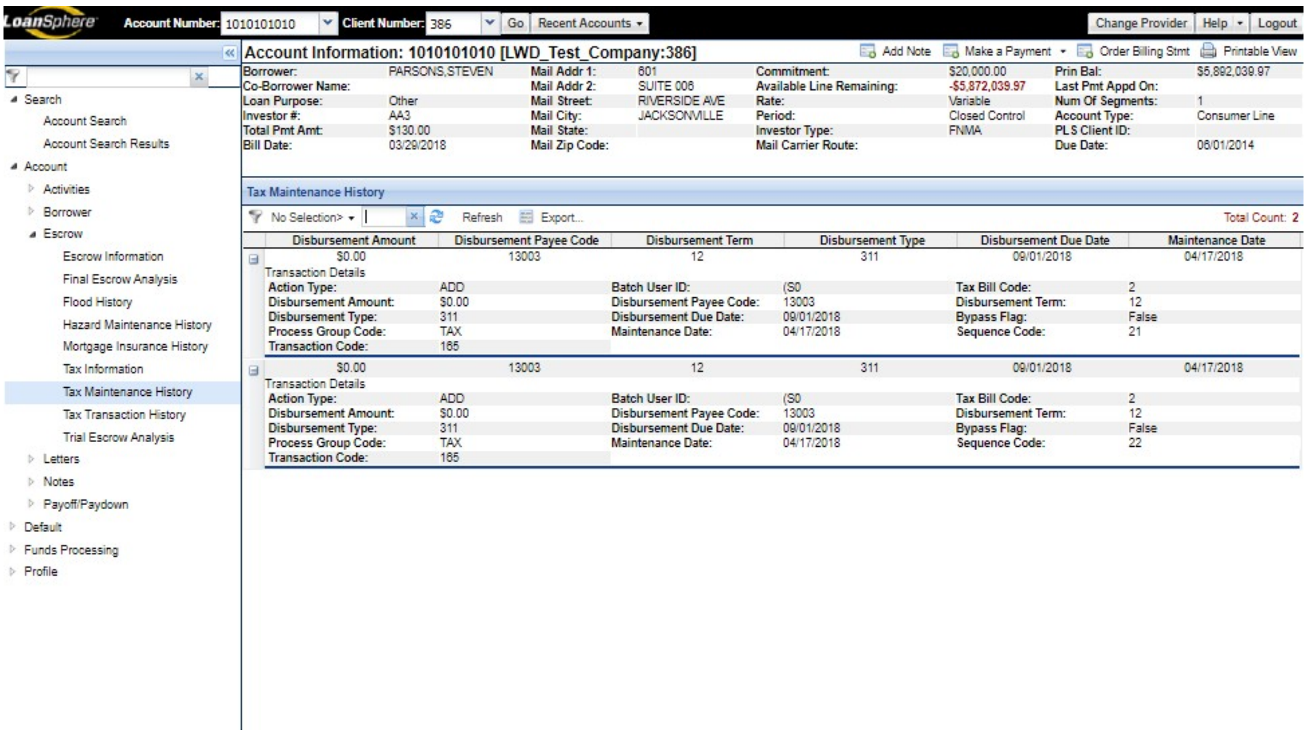
A confirmation message appears.

6 Click **Yes**.

The tax lien entry is removed from the Tax Lien Information grid.

Tax Maintenance History

The Tax Maintenance History view displays general tax maintenance history for individual loans including the tax ID and payee code.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

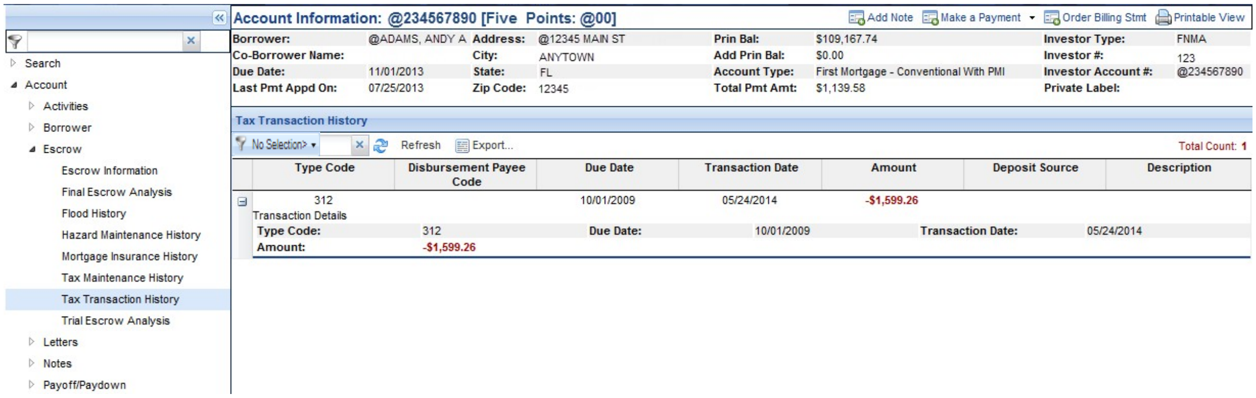
2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Tax Transaction History

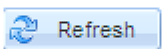
The Tax Transaction History view displays real estate tax transaction history for an individual loan.



To filter only the information you want to view:

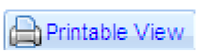
1 Click 

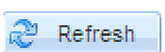
and choose the field you want to filter.

2 Click 

and all other transactions are filtered out of the view.

Tips:

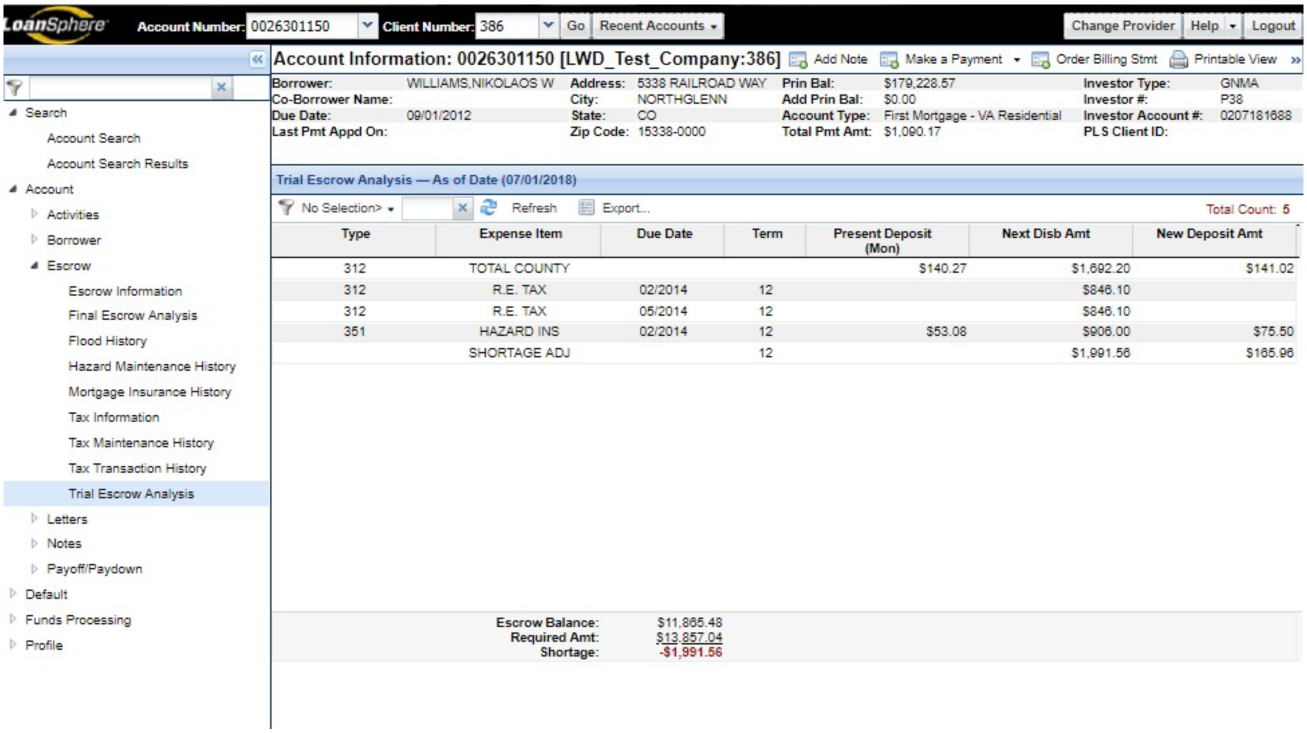
- The 

feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The 

button restores the default values.

Trial Escrow Analysis

The Trial Escrow Analysis view displays information about the current trial escrow analysis on a loan including escrow type, amount, balance, and shortage/overage.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

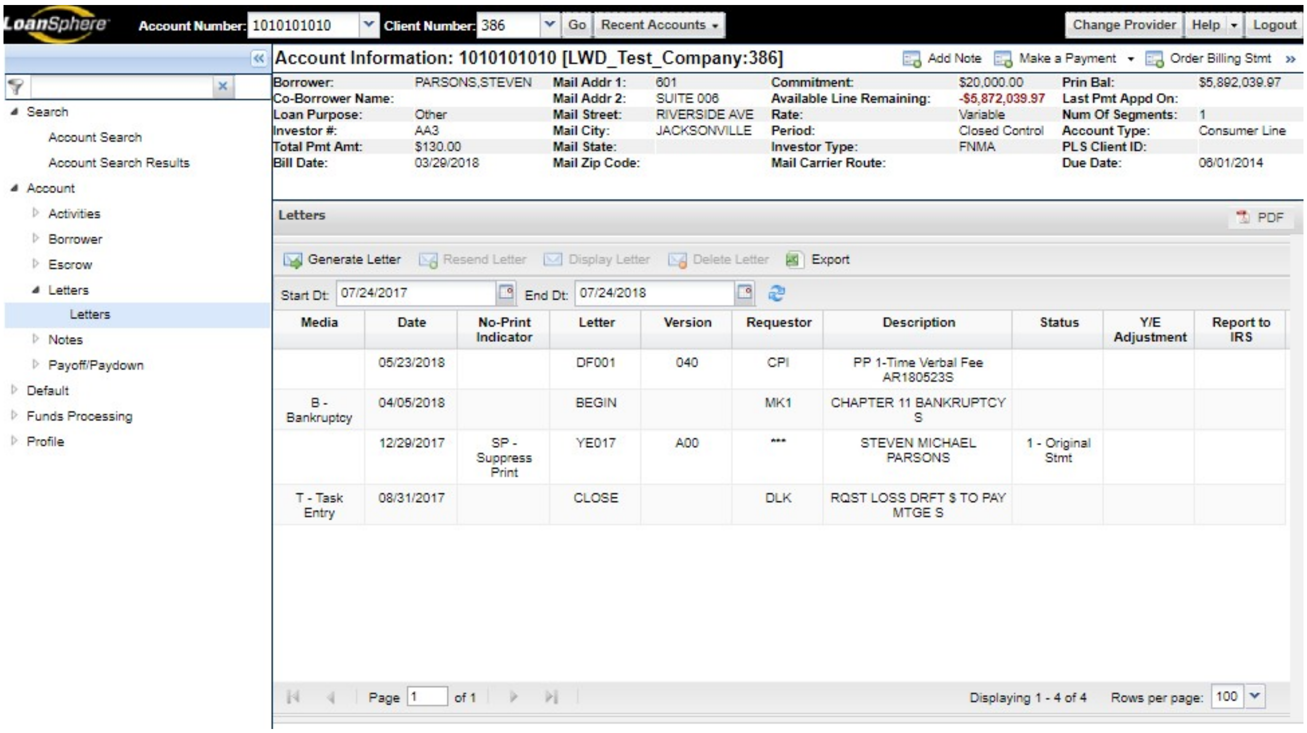
2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Letters

Letters displays the letters sent to the borrower, the letter history, and enables you to send, re-send, export, delete, and generate letters to PDF. You have the ability to size, sort, and filter columns from the view. The columns display in the view by default and you have the ability to size, sort, and filter columns from the view.

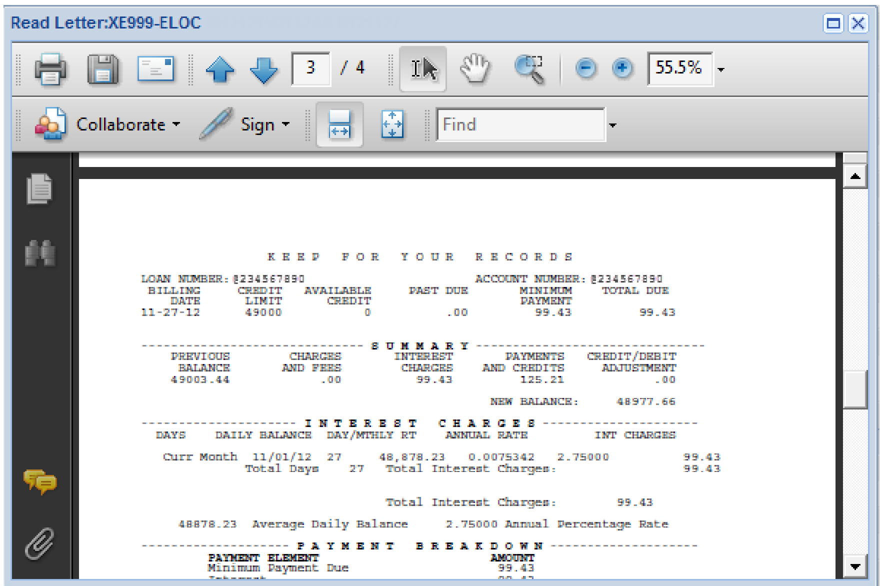


Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Display a Letter

To view a letter, either double-click the letter or select the letter and click **Display Letter**.



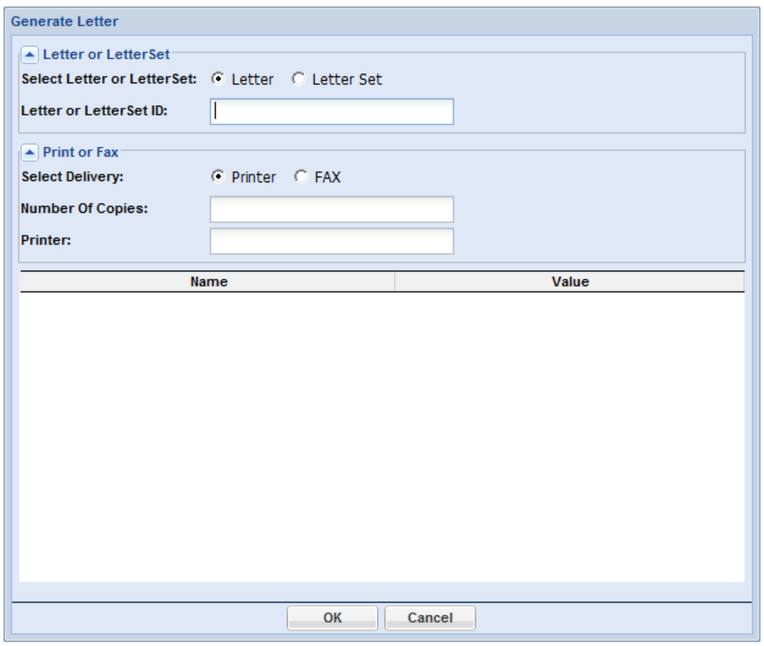
Generate a Letter

1. View the letter log.
2. Click **Generate Letter**.

   The Generate Letter dialog box appears.
3. Enter the letter ID.
4. Enter any fields that are applicable for that letter.
5. Click **OK**.

   Information about the letter or letter set that you generated appears at the top of the letter log.

   The system engages the Letter Service (LetterService) Web service to pass information about the letter to OLLW. OLLW produces the letter or letter set.



Export the Letters Area

1. View Letters.
2. Click **Export**.

   The Export Letters dialog box appears.
3. Type a name for the export file and select the appropriate format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

Delete a Letter

1 View the letter log.

2 Select a letter from the letter log.

3 Click **Delete Letter**.

The Delete Letter dialog box displays the message: **Are you sure you want to delete <*letter id*>?**

4 Click **Yes**.

The Letters area no longer displays information about the letter that you deleted. Web Direct uses the Letter Service (LetterService) Web service to pass information about the deleted letter to legacy MSP. legacy MSP removes the deleted letter from the OLLW letter log.

Generate Letters to PDF

1 View the letter log.

2 Click **PDF**.

The PDF Options window appears.

3 Type a name for the PDF file and select the appropriate rows and columns options.

The Rows to View> Page option generates transactions that appear on the page to PDF basedon any filters applied. The Rows to View> All option generates all transactions to the PDF, regardless of any filters applied.

4 Click **OK**.

5 Do the following as necessary:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

6 Print, save, or close the PDF, as necessary.

Resend a Letter

1 View the letter log.

2 Select a letter from the letter log.

3 Click **Resend Letter**.

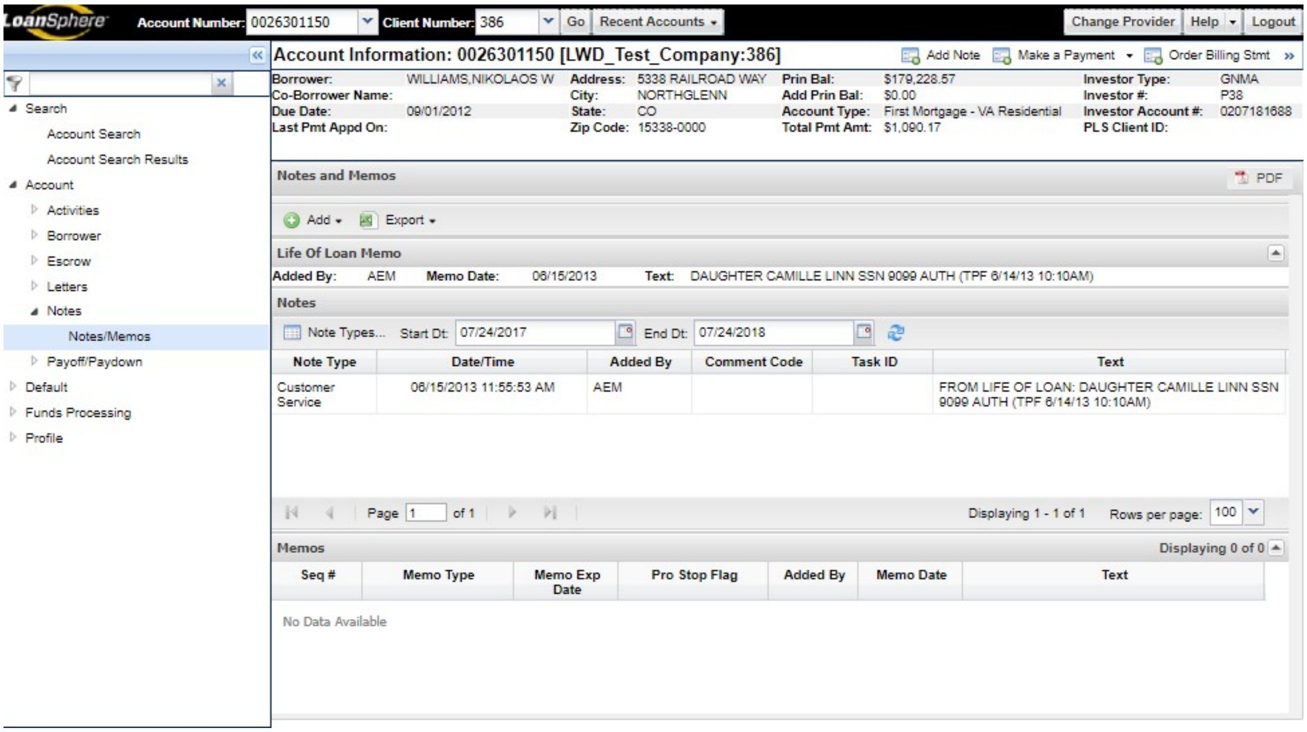
A confirmation message appears.

4 Click **Yes**.

A new line appears in the letter log with “Copy Of Letter” in the **No-Print Indicator** column.

Notes and Memos

The Notes and Memos view displays all notes and memos on a loan.



Tips:

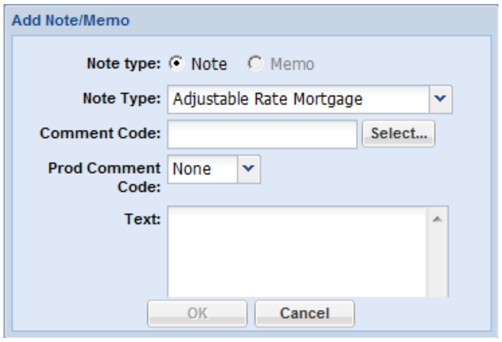
- The view defaults to the last 12 months of notes. To view additional notes or to view notes for a certain time frame, change the start and end dates.
- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Add a Note

To add a note for any functional area on a loan:

1. Do one of the following:
   - Access the Notes/Memo view and click **Add** in the Notes section of the Notes/Memos page.
   - Click **Add Note** at the top of the Account Information section.

   The Add Note/Memo window displays.



2 Select the Note option.

3 Choose the **Note Type** you want to place on the loan.

4 For foreclosure and collection notes, you can enter the **Prod Comment Code**.

5 Select a **Comment Code** and/or type the free-form **Text** of the note.

6 Click **OK**.

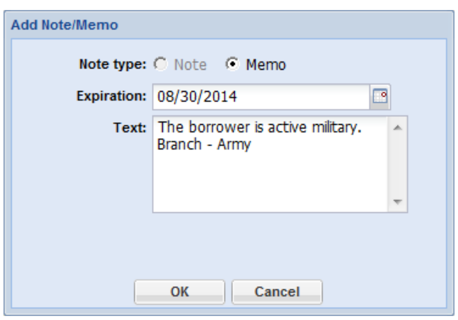
The note is available for viewing immediately.

Add a Memo

To add a memo:

1 Click **Add** in the Memos Life of Loan section of the Notes/Memos page.

The Add Note/Memo box appears with the Memo option selected.



2 Change the **Expiration** date, if applicable.

3 Type the **Text** of the memo.

4 Click **OK**.

The memo is available for viewing immediately.

Payoff Express

Payoff Express, accessible from Account >> Payoff/Paydown in the navigation tree, enables you to request payoff statements, to view information about orders for payoff statements, and to view order attachments.

When you request a payoff statement, the system validates the loan number and determines whether the loan qualifies for a payoff statement based on client-defined rules. If the loan qualifies for a payoff statement, the system uses the Payoff Express service to pass requests for payoff information to the MSP system. MSP gathers payoff information from various MSP workstations and creates a payoff statement in Online LetterWriter. MSP sends the payoff statement to Web Direct where it is available to the recipient identified in the request.

If the system cannot process the request, it displays messages about conditions that prevented it from completing the order.

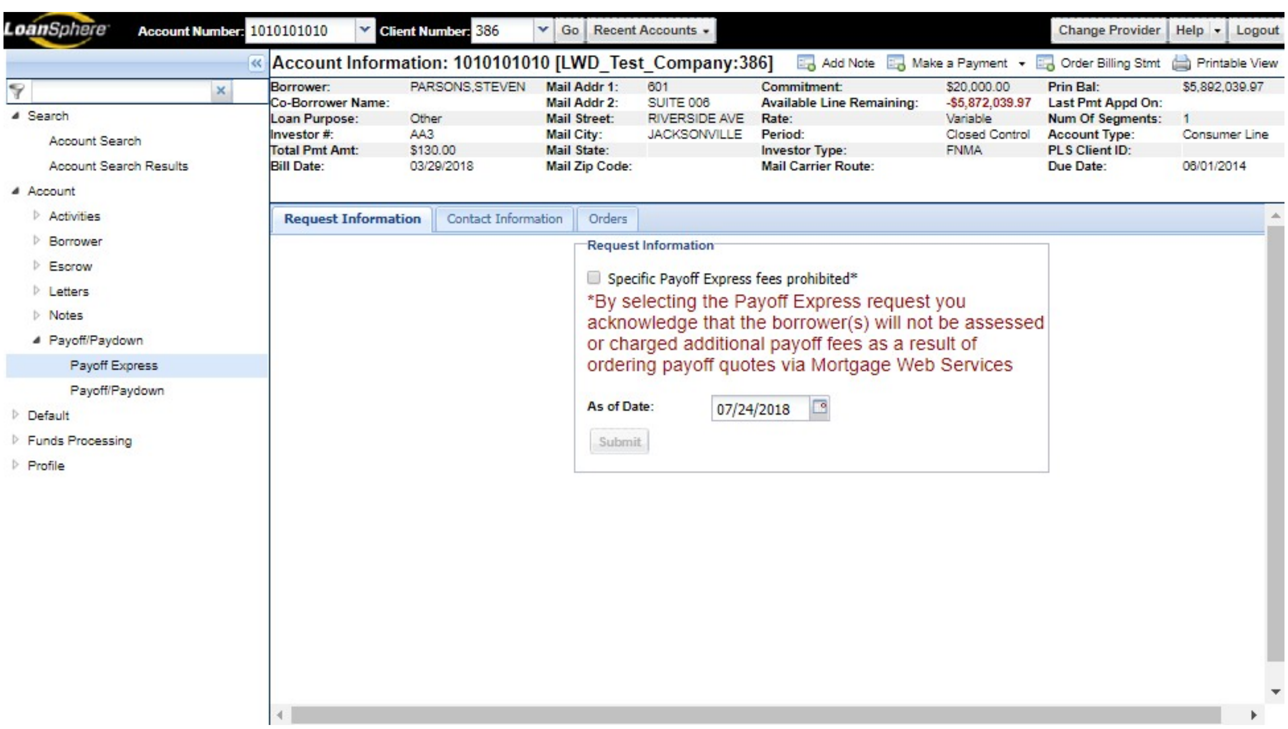
Amended payoff statements are also available through Payoff Express. The system automatically provides amended payoff statements provided the original payoff quote was ordered after your company was installed on the appropriate enhancement and the original order generated a payoff statement through the Payoff Express service. To be eligible for automatic amended payoff statements your company must be installed on the appropriate enhancement.

You must have the appropriate privileges to use Payoff Express.

Request Payoff Statements

1 Search for an account.

2 Click **Payoff Express** in the navigation tree under Account >> Payoff/Paydown.



The Request Information tab appears by default. The Contact Information tab displays information from your user profile by default.

3 Select the Contact Information tab and verify that the information in the fields relates to the intended recipient of the payoff statement.

Name is not required, but if you use it, **Address**, **City**, **State**, **Zip Code**, and **Work Number** are required.

4 To print a printer-friendly version of the Contact Information tab, do the following:

- At the top right of the page click **Printable View**.
- At the Security Alert window select **Yes** and then select **OK**.
  The Web Direct Printable View page displays the contents of the Contact Information tab in a new window.
- Print the page, as necessary.

5 Select the Request Information tab and complete the fields.

Specific Payoff Express fees prohibited and **As of Date** are required. **As of Date** displays today's date by default, but you can type a future date in MM/DD/YYYY format or select a future date from the calendar.

6 Click **Submit**.

When your order is successful, the Orders tab displays information about the order including the order ID, when the order was last updated, and provides order attachments. When the order is unsuccessful, the system displays messages about the order or about conditions that prevented the system from processing the order.

View Order Status and Attachments

1 Search for an account.

2 Do one of the following:

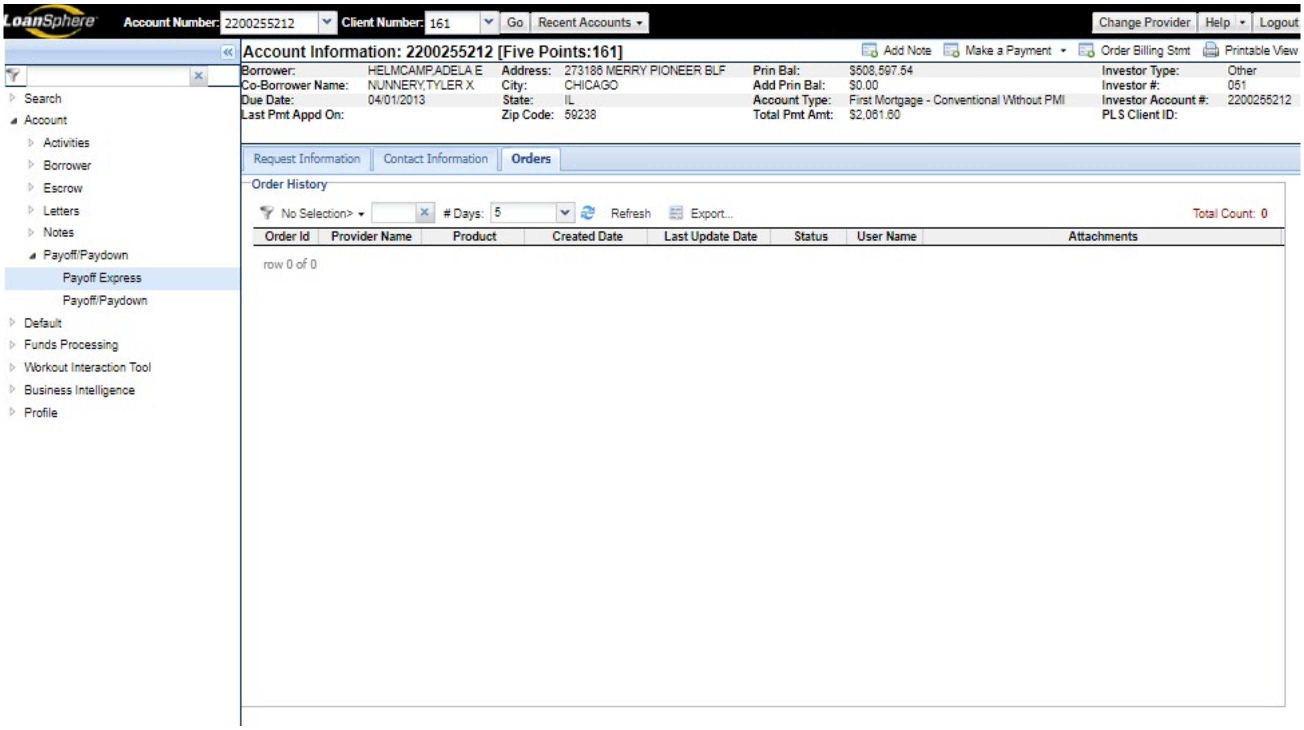
- Click **Make a Payment** in the navigation tree under Funds Processing >> Payment.
- Click **Make a Payment** above the Account Information section.

The Request Information tab is selected by default.

3 Select the Orders tab. The Order History page displays a list of orders placed in the last five days in descending order by order ID. **# of days** defaults to **5**.

4 View the fields and do the following, as necessary.

- To view the entire Order History page, hide the navigation tree.



- To filter the list of orders, click **Filter < No Selection >** and make a selection from the drop-down list. In the adjacent unlabeled field, type a value corresponding with the filter criteria. For example, if you filter by order ID, in the unlabeled field, type the order ID number.
- To filter for orders placed within a specific time frame, at **# of Days**, make a selection from the drop down list. **# of Days** automatically defaults to **5**.
- To sort columns in ascending or descending order, click the column heading.
- To return the page to its original layout and restore its contents, at the top of the Order History page, click **Refresh**.

5 To print a printer-friendly version of the Order History page, do the following:

- At the top right of the page, click **Printable View**.
- At the Security Alert window click **Yes** and then click **OK**.
  The Web Direct Printable View page displays the contents of the Order History page in a new window. Information that was not visible does not appear in the printable view. If you were viewing filtered order history, the printable view displays only the filtered order history that you were viewing. The printable view does not display items that you filtered out.
- Print the page, as necessary.

6 To view an order attachment, under **Attachments**, click the link corresponding with the order ID.

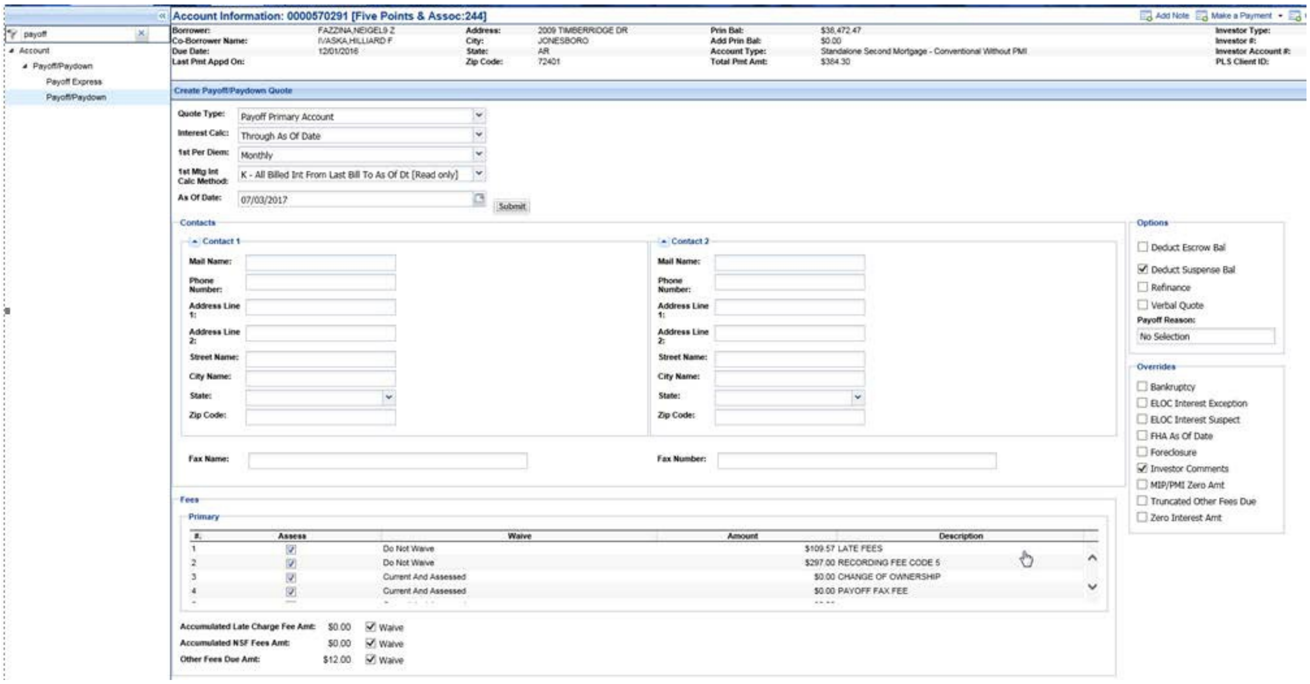
The order attachment opens in a separate window.

7 To export the list of orders, click **Export**.

The exported file does not display attachments for the order(s).

Payoff/Paydown

Payoff and Paydown enables users to create payoff and paydown quotes on primary mortgage loans, second (piggyback) mortgage loans, or a combined primary/piggyback loan and eligible ELOC loans. The generated quote will display statements using the Letters functionality in Web Direct, and it will display specific quote fields and overrides on one screen for updating. A quote summary will appear, and a printable summary will be provided. An authorized user can also apply overrides through Web Direct to create a quote.



Create Paydown Quotes on Primary Accounts

1 Click **Payoff/Paydown** in the navigation tree under Account >> Payoff/Paydown.

The Create Payoff/Paydown Quote page appears.

2 In the **Quote Type** drop-down field, select **Paydown Primary Account**.

3 In the **Interest Calc** drop-down field, select a calculation option.

4 In the **1st Per Diem** drop-down field, select a calculation option.

5 In the **1st Mtg Int Calc Method** drop-down field, select a calculation method, as applicable.

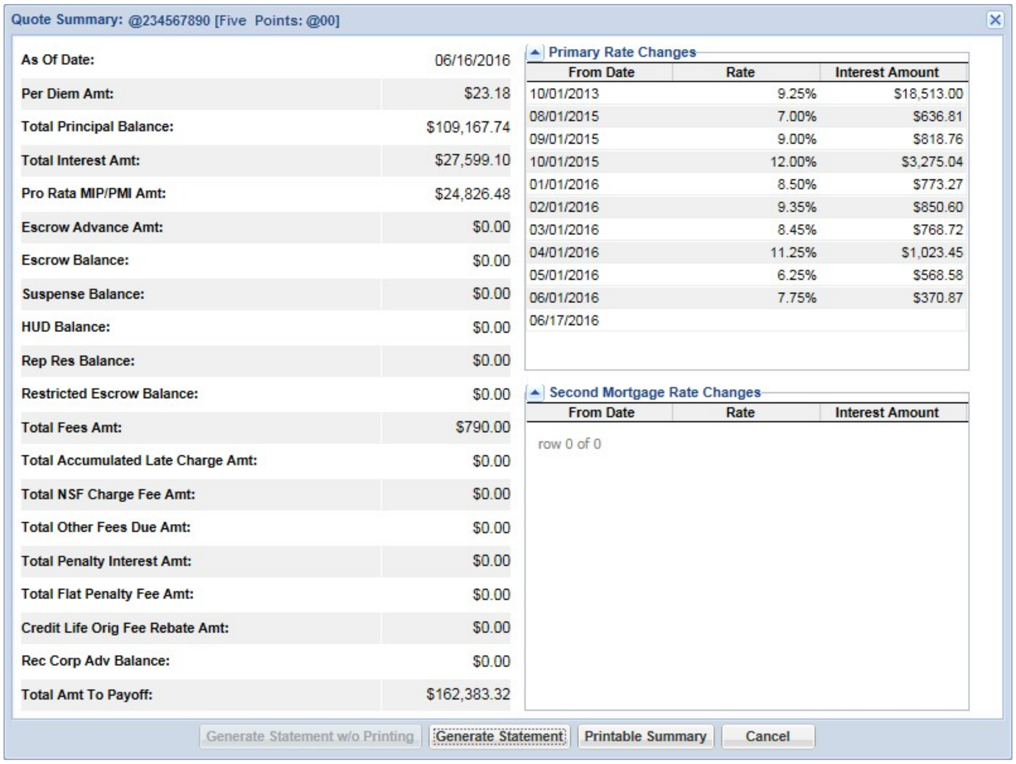
6 In the **As Of Date** field, select an effective date for the paydown quote.

7 Update the options, contact information, and fees, as applicable.

8 In the Overrides panel, select the appropriate overrides, as applicable.

9 Click **Submit**.

The Quote Summary appears.



10 Do one of the following:

- To generate a quote statement, click **Generate Statement**.
- To generate a quote statement without printing, click **Generate Statement w/o Printing**.

  If you do not have the appropriate security, you cannot use the **Generate Statement w/o Printing** function.

- To print a summary, click **Printable Summary**.

11 View the generated statement in the Letters view.

Create Payoff Quotes on Primary Accounts

1 Click **Payoff/Paydown** in the navigation tree under Account >> Payoff/Paydown.

The Create Payoff/Paydown Quote page appears.

2 In the Quote Type drop-down list, click **Payoff Primary Account**.

3 In the **Interest Calc** drop-down list, select a calculation option.

4 In the **1st Per Diem** drop-down field, select a calculation option.

5 In the **1st Mtg Int Calc Method** drop-down field, select a calculation method, as applicable.

6 In the **As Of Date** field, select an effective date for the payoff quote.

7 Update the options, contact information, and fees, as applicable.

8 In the Overrides panel, select the appropriate overrides, as applicable.

9 Click **Submit**.

The Quote Summary appears.

10 Do one of the following:

- To generate a quote statement, click **Generate Statement**.
- To generate a quote statement without printing, click **Generate Statement w/o Printing**.

> If you do not have the appropriate security, you cannot use the **Generate Statement w/o Printing** function.

- To print a summary, click **Printable Summary**.

11 View the generated statement in the Letters view.

Create Payoff Quotes on Piggyback Accounts

1 Click **Payoff/Paydown** in the navigation tree under Account >> Payoff/Paydown.

The Create Payoff/Paydown Quote page appears.

2 In the Quote Type drop-down list, click **Payoff Piggyback Account Only**.

3 In the **Interest Calc** drop-down list, select a calculation option.

4 In the **2nd Per Diem** drop-down field, select a calculation option.

5 In the **2nd Mtg Int Calc Method** drop-down field, select a calculation method, as applicable.

6 In the **As Of Date** field, select an effective date for the payoff quote.

7 Update the options, contact information, and fees, as applicable.

8 In the Overrides panel, select the appropriate overrides, as applicable.

9 Click **Submit**.

The Quote Summary appears.

10 Do one of the following:

- To generate a quote statement, click **Generate Statement**.
- To generate a quote statement without printing, click **Generate Statement w/o Printing**.

  If you do not have the appropriate security, you cannot use the **Generate Statement w/o Printing** function.

- To print a summary, click **Printable Summary**.

11 View the generated statement in the Letters view.

Create Payoff Quotes on Primary and Piggyback Accounts

1 Click **Payoff/Paydown** in the navigation tree under Account >> Payoff/Paydown.

The Create Payoff/Paydown Quote page appears.

2 In the Quote Type drop-down list, click **Payoff Both Primary and Piggyback**.

3 In the **Interest Calc** drop-down list, select a calculation option.

4 In the **1st Per Diem** and **2nd Per Diem** drop-down fields, select calculation options.

5 In the **1st Mtg Int Calc Method** and **2nd Mtg Int Calc Method** drop-down fields, select calculation methods, as applicable.

6 In the **As Of Date** field, select an effective date for the payoff quote.

7 Update the options, contact information, and fees, as applicable.

8 In the Overrides panel, select the appropriate overrides, as applicable.

9 Click **Submit**.

The Quote Summary appears.

10 Do one of the following:

- To generate a quote statement, click **Generate Statement**.

- To generate a quote statement without printing, click **Generate Statement w/o Printing**.

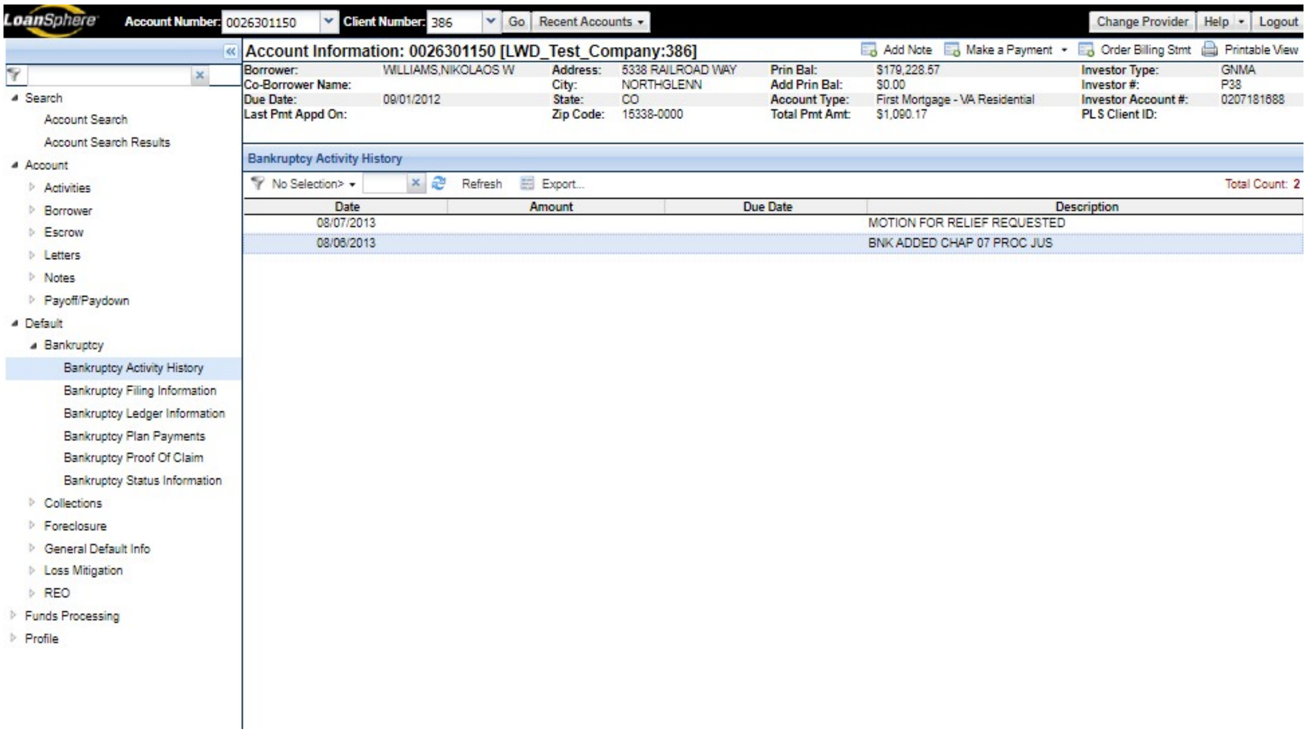
  If you do not have the appropriate security, you cannot use the **Generate Statement w/o Printing** function.

- To print a summary, click **Printable Summary**.

11 View the generated statement in the Letters view.

Bankruptcy Activity History

The Bankruptcy Activity History view displays the bankruptcy history activity, including system generated data as well as manual entries by loan processors.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

2 Click Refresh and all other transactions are filtered out of the view.

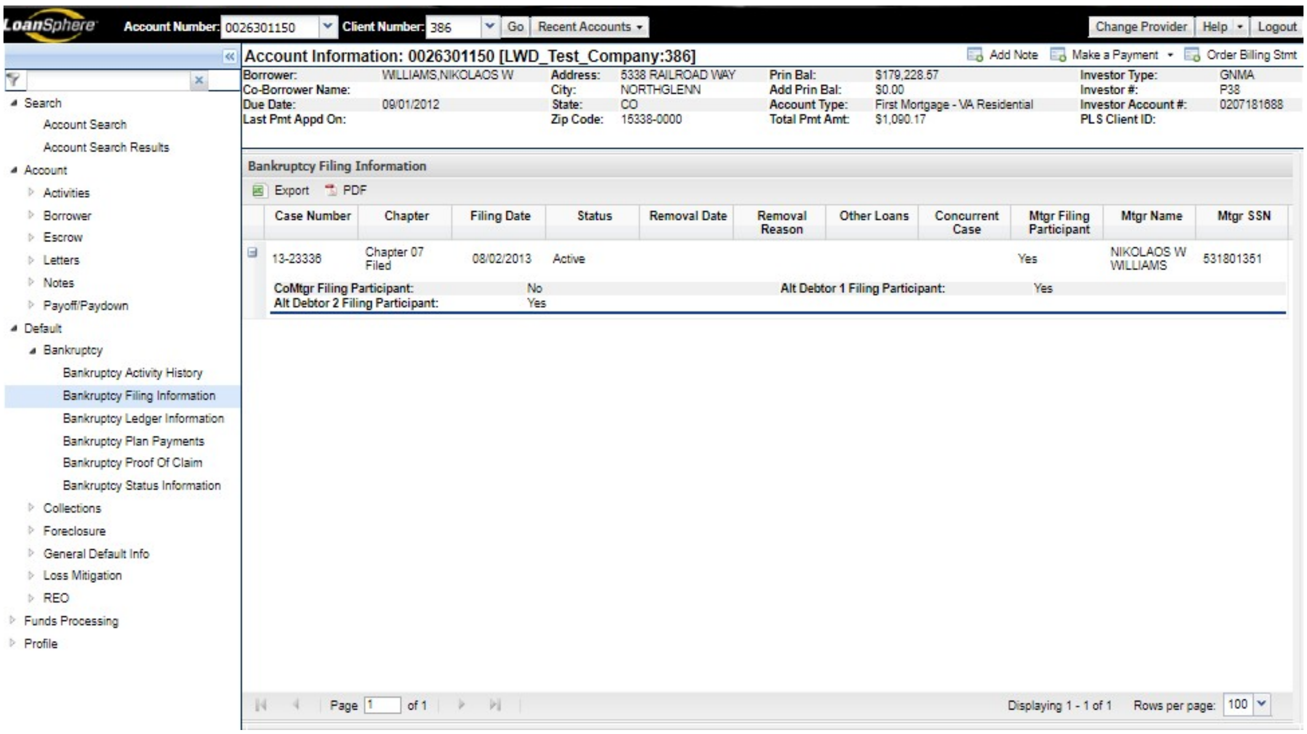
Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Bankruptcy Filing Information

The Bankruptcy Filing Information view enables you to view a history of bankruptcy filing information for a loan. You can view, export, and generate a PDF of bankruptcy status filing information.

You must have the appropriate privileges and permissions to access the Bankruptcy Filing Information view.



Tips:

- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.

Export Bankruptcy Filing Information

1. Open the Bankruptcy Filing Information page for a loan.
2. Click **Export**.

   The Export dialog box displays.
3. Type a name for the export file and select the appropriate format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

   Web Direct saves or displays the exported file with the bankruptcy filing information.

Generate Bankruptcy Filing Information to PDF

1. Open the Bankruptcy Filing Information page for a loan.
2. Click **PDF**.

   The File Download dialog box appears.
3. Do one of the following:
   - To preview the PDF file, click **Open**.
   - To save the PDF file, click **Save**.
4. Print, save, or close the PDF, as necessary.

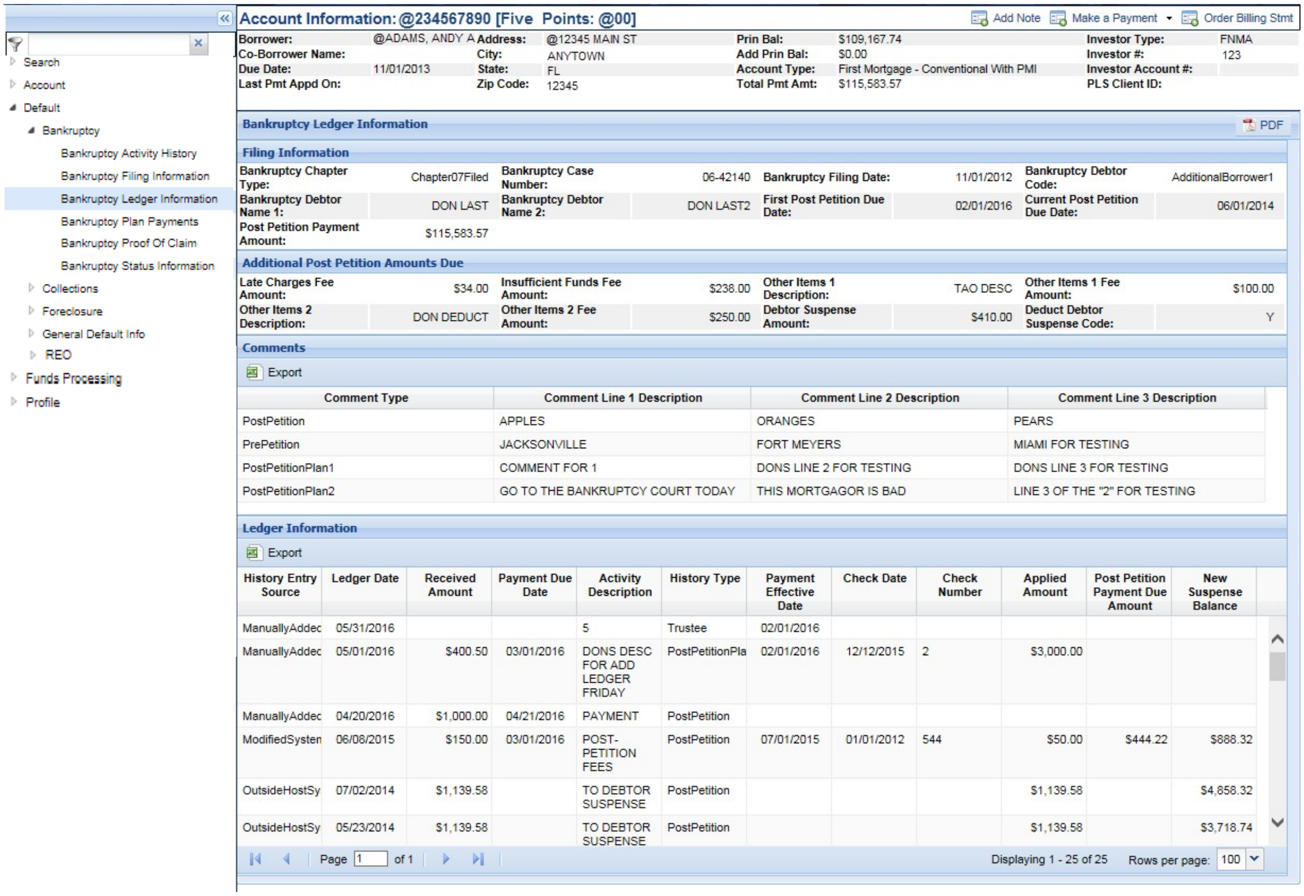
Bankruptcy Ledger Information

Bankruptcy Ledger Information is available if you are installed on IP 2101. This view is accessible from Views on the navigation tree under Default >> Bankruptcy. It enables you to view and export bankruptcy ledger information.

Bankruptcy Ledger add, update, and delete functionality is not yet available.

Use the Bankruptcy Ledger Information view to track and print monetary activity on accounts that are active in the Bankruptcy Workstation. This view displays data from the BNKX screen, including the ADDP, COMM and FILI work windows, and enables you to provide an account of the bankruptcy monetary activity to outside parties who are involved with the account's bankruptcy.

You must have the appropriate privileges and permission to view bankruptcy ledger information. If you do not have the appropriate privileges and permissions, Bankruptcy Ledger Information is not available to you.



To filter only the information you want to view:

1 Click No Selection> and choose the field you want to filter.

2 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Export Bankruptcy Ledger Comments

1 Open the Bankruptcy Ledger Information view.

2 In the Comments section, click **Export**.

3 Type a name for the export file and select the appropriate format.
4 Click **OK**.
5 Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

Export Bankruptcy Ledger Information

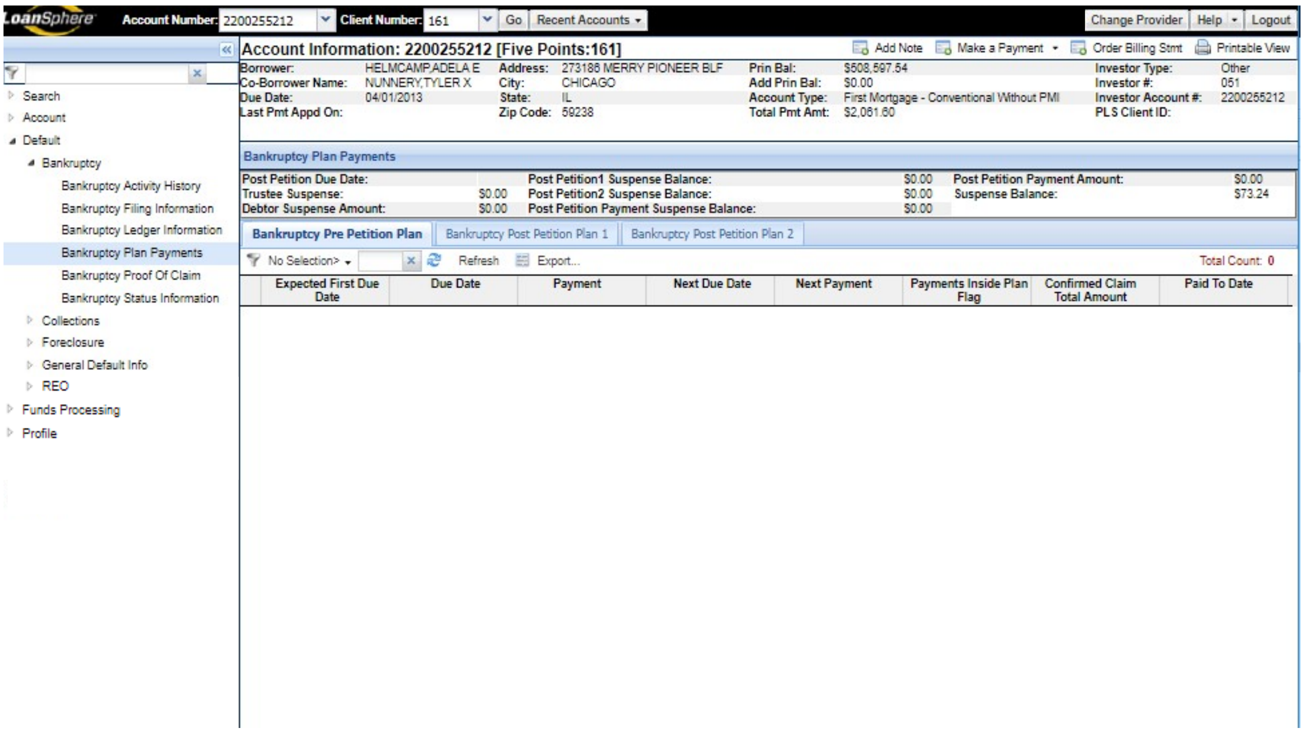
1 Open the Bankruptcy Ledger Information view.
2 In the Ledger Information section, click **Export**.
3 Type a name for the export file and select the appropriate format.
4 Click **OK**.
5 Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

Generate Bankruptcy Ledger Information

1 View Bankruptcy Status Information.
2 At the top-right corner of the page, click **PDF**.
   The PDF Options dialog box appears.
3 Type a name for the generated PDF file and select desired rows and columns to view.
4 Click **OK**.
   The File Download dialog box appears.
5 Do the following, as necessary:
   - To preview the PDF file, click **Open**.
   - To save the PDF file, click **Save**.
6 Print, save, or close the PDF, as necessary.

Bankruptcy Plan Payments

The Bankruptcy Plan Payments view displays bankruptcy payment information that has been segregated by pre-petition, post petition plan 1, and post petition plan 2 payment activities.



To filter only the information you want to view:

7 Click No Selection> and choose the field you want to filter.

8 Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

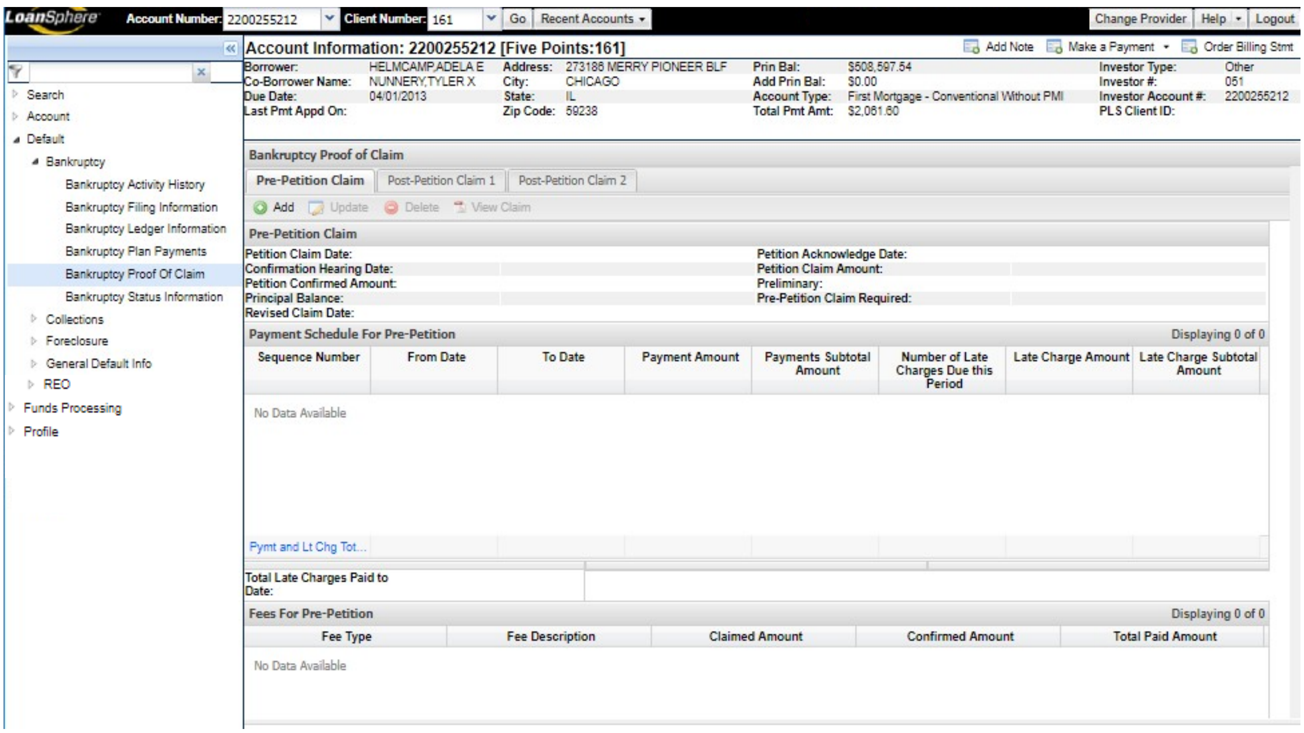
Bankruptcy Proof of Claim

The Bankruptcy Proof of Claim view enables you to view, add, update, delete, and print bankruptcy proof of claim data on the following tabs:

- Pre-Petition Claim
- Post-Petition Claim 1
- Post-Petition Claim 2

Each tab includes the following sections with the related pre-petition or post-petition data:

- Payment Schedule For Pre/Post-Petition
- Fees For Pre/Post-Petition



Add Bankruptcy Proof of Claim

1 Open the Bankruptcy Proof of Claim page for a loan.

2 Click **Add** at the top of the tab.

If you do not have the appropriate privileges and permissions to add bankruptcy proof of claim information, the **Add** button is disabled.

The Add Proof of Claim window appears.

3 Complete the fields.

4 Click **OK** to save the changes.

The bankruptcy proof of claim information is saved and it appears on the appropriate tab of the Bankruptcy Proof of Claim window.

Update Bankruptcy Proof of Claim

1. Open the Bankruptcy Proof of Claim page for a loan.
2. Click **Update**.

If you do not have the appropriate privileges and permissions to update bankruptcy proof of claim data, the **Update** function is not available.

The Update Proof of Claim window appears.

3. Complete the fields.
4. Do one of the following:
    - Click **OK** to save the changes.
      The updated bankruptcy proof of claim data is saved and it appears in the Bankruptcy Proof of Claim window.
    - Click **Reset** to clear information in the Add Proof of Claim window.
      The fields in the Add Proof of Claim window are reset to the values that previously existed in the fields before any updates were made. You can choose to update information in the Add Proof of Claim fields, if desired.

Delete Bankruptcy Proof of Claim

1. Open the Bankruptcy Proof of Claim page for a loan.
2. Click **Delete** at the top of the tab.

If you do not have the appropriate privileges and permissions to delete bankruptcy proof of claim information, the **Delete** button is disabled.

The Delete dialog box displays the message: **Are you sure you want to delete the item?**

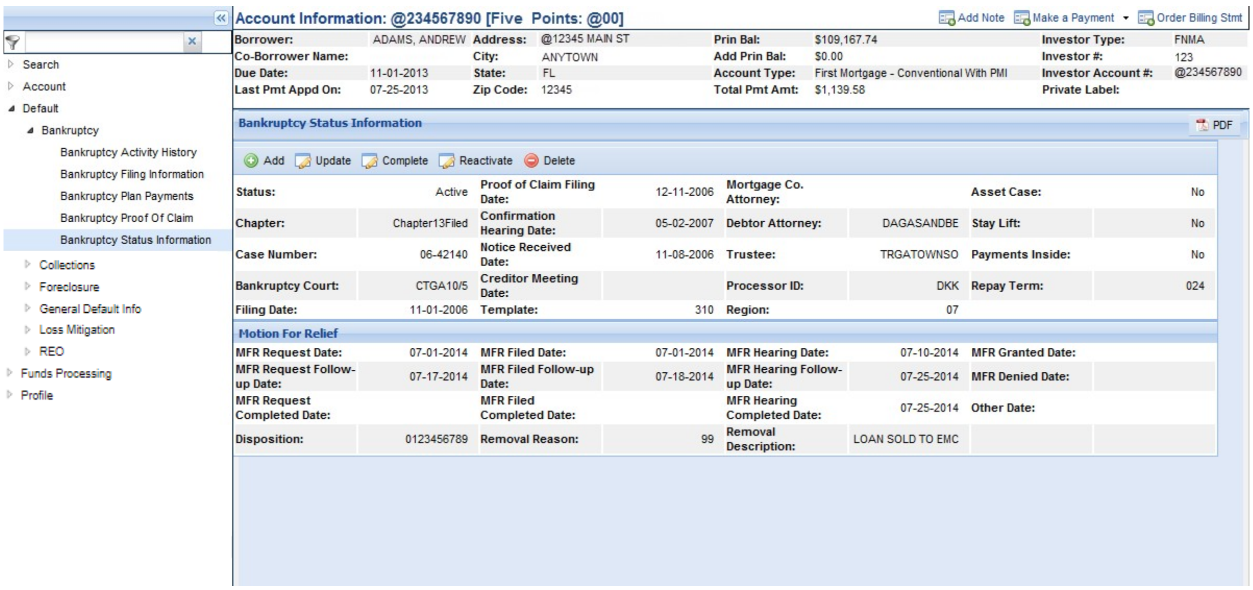
3. Click **OK**.

The selected Bankruptcy Proof of Claim tab no longer displays the bankruptcy pre-petition or post-petition information that you deleted.

Bankruptcy Status Information

The Bankruptcy Status Information view enables you to view bankruptcy status information. You can use this view to add, view, update, complete, delete, and reactivate bankruptcy status for an account. You can also generate a PDF file of bankruptcy status information.

You must have the appropriate privileges and permissions to access the Bankruptcy Status Information view.



Add Bankruptcy Status Information

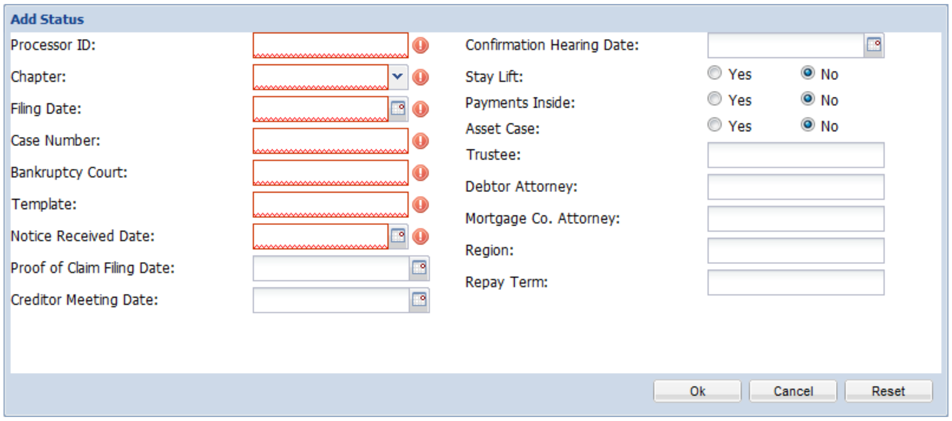
1 Open the Bankruptcy Status Information page for a loan.

2 Click **Add**.

If the loan is already active in bankruptcy, the **Add** button is disabled.

If you do not have the appropriate privileges and permissions to add bankruptcy status information, the **Add** function is not available.

The Add Status window appears.



3 Add information for the required fields using the Bankruptcy Status Information Field Descriptions topic as a reference.

4 Add information for the remaining optional fields, as desired.

5 Do one of the following:

- Click **OK** to save the changes.
  The bankruptcy status information is saved and it appears in the Bankruptcy Status Information window.
- Click **Reset** to clear information in the Add Status window.
  The Add Status fields are cleared and not saved. You can choose to enter new information in the Add Status fields.

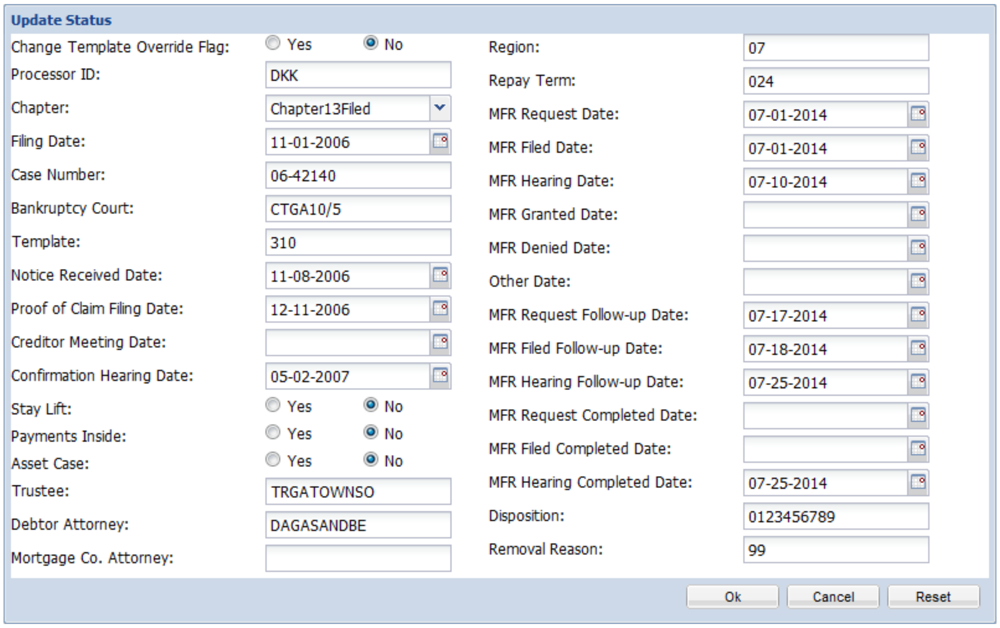
Update Bankruptcy Status Information

1 Open the Bankruptcy Status Information page for a loan.

2 Click **Update**.

If you do not have the appropriate privileges and permissions to update bankruptcy status information, the **Update** function is not available.

The Update Status window appears.



3 Update the fields.

4 Do one of the following:

- Click **OK** to save the changes.
  The updated bankruptcy status information is saved and it appears in the Bankruptcy Status Information window.
- Click **Reset** to clear information in the Update Status window.
  The fields in the Update Status window are reset to the values that previously existed in the fields before any updates were made. You can choose to update information in the Update Status fields, if desired.

Delete Bankruptcy Status Information

1 Open the Bankruptcy Status Information page for a loan.

2 Click **Delete**.

If you do not have the appropriate privileges and permissions to delete bankruptcy status information, the **Delete** function is not available.

The Delete Status dialog box displays the message: **Are you sure you want to delete the item?**

3 Click **OK**.

The dialog box closes and the Bankruptcy Status Information area no longer displays the bankruptcy status information.

Reactivate Bankruptcy Status Information

1 Open the Bankruptcy Status Information page for a loan.

2 If the bankruptcy status equals Completed or Deleted, click **Reactivate**.

If you do not have the appropriate privileges and permissions to reactivate bankruptcy status information, the **Reactivate** function is not available.

The message **Are you sure you want to reactivate this item?** appears.

3 Click **OK**.

A confirmation message appears confirming that the reactivation was successful.

Complete a Bankruptcy Status

1 Search for a loan.

2 Click **Bankruptcy Status Information** in the navigation tree under Default >> Bankruptcy.

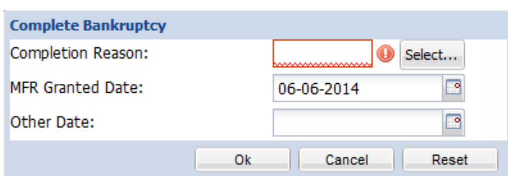
If you do not have the appropriate privileges and permissions to view bankruptcy status information, the Bankruptcy Status Information view is not available.

The Bankruptcy Status Information page displays the Bankruptcy Status Information area.

3 Click **Complete**.

If you do not have the appropriate privileges and permissions to complete bankruptcy status information, the **Complete** function is not available.

The Complete Bankruptcy window appears.



4 Complete the fields.

5 Do one of the following:

- Click **OK** to save the changes.

  A confirmation window appears and the loan information is removed from the Bankruptcy Status Information window.

- Click **Reset** to clear information in the Complete Bankruptcy window.

  The Complete Bankruptcy fields are cleared and not saved. You can choose to enter new information in the Complete Bankruptcy fields.

Generate Bankruptcy Status Information to PDF

1 Search for a loan.

2 Click **Bankruptcy Status Information** in the navigation tree under Default >> Bankruptcy.

If you do not have the appropriate privileges and permissions to view bankruptcy status information, the Bankruptcy Status Information view is not available.

The Bankruptcy Status Information page displays the Bankruptcy Status Information area.

3 Click **PDF**.

The File Download dialog box appears.

4 Do one of the following:

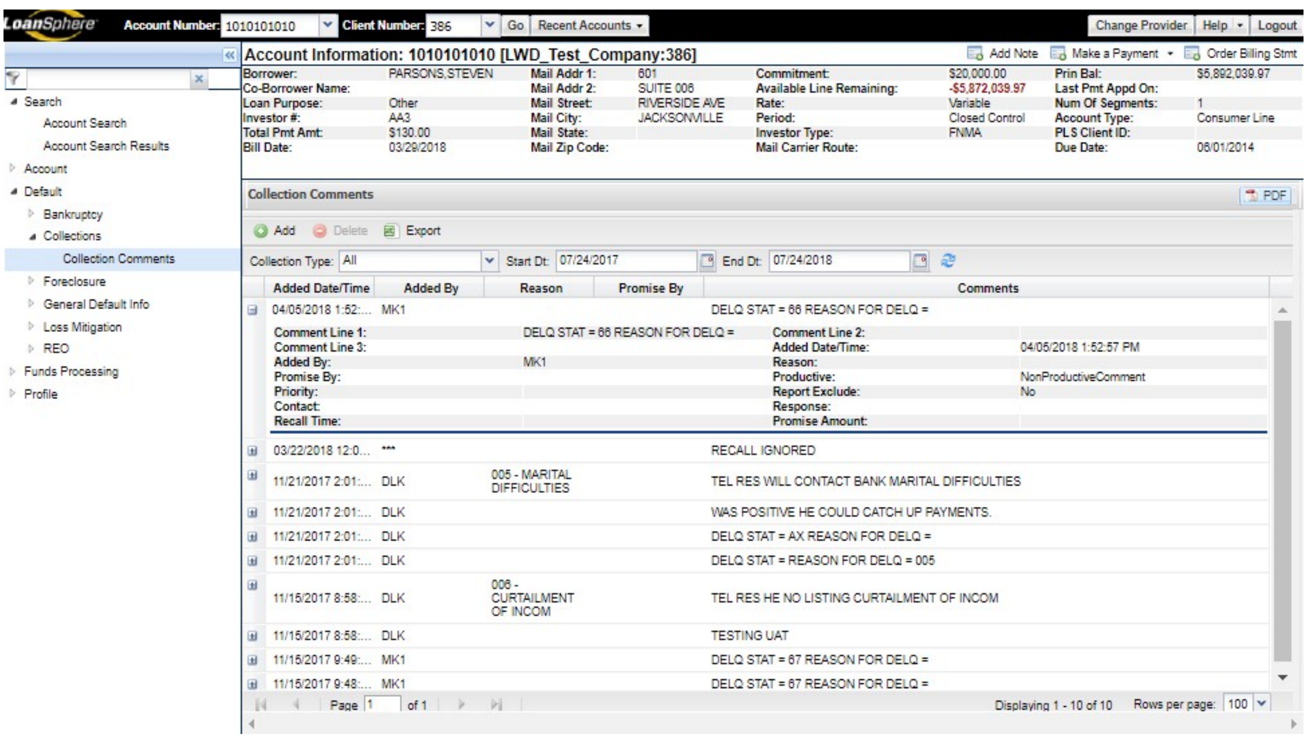
- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

5 Print, save, or close the PDF, as necessary.

Collection Comments

The Collection Comments view enables you to view, add, export, delete and generate to PDF collection comments. You have the ability to size, sort, filter, columns from view. The columns display in the view by default and have the following features:

- Ability to size column
- Ability to sort (ascending/descending)
- Ability to filter column values
- Ability to add and remove column from view



Add Collection Comments

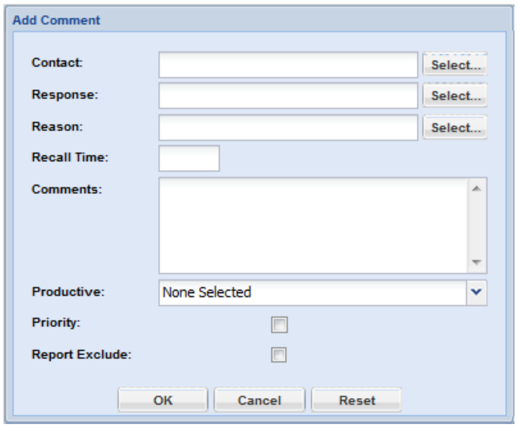
1 Open Collection Comments.

2 Click **Add**.

3 Complete the fields for the collection comment being added.

4 Click **OK**.

The comment is saved and appears on the Collection Comments view and Notes and Memos.



Delete Collection Comments

1 Open Collection Comments.

2 Select the comment you want to delete.

3 Click **Delete**.

A confirmation message appears.

4 Click **Yes**.

The comment is deleted from the Collection Comments list.

Generate Collection Comments to PDF

1 Open Collection Comments.

2 Click **PDF**.

The PDF Options window appears.

3 Type a name for PDF file and select the appropriate rows and columns options:

The Rows to View> Page option generates transactions that appear on the page to PDF, based on any filters applied. The Rows to View> All option generates all transactions to the PDF, regardless of any filters applied.

4 Click **OK**.

5 Do the following as necessary:

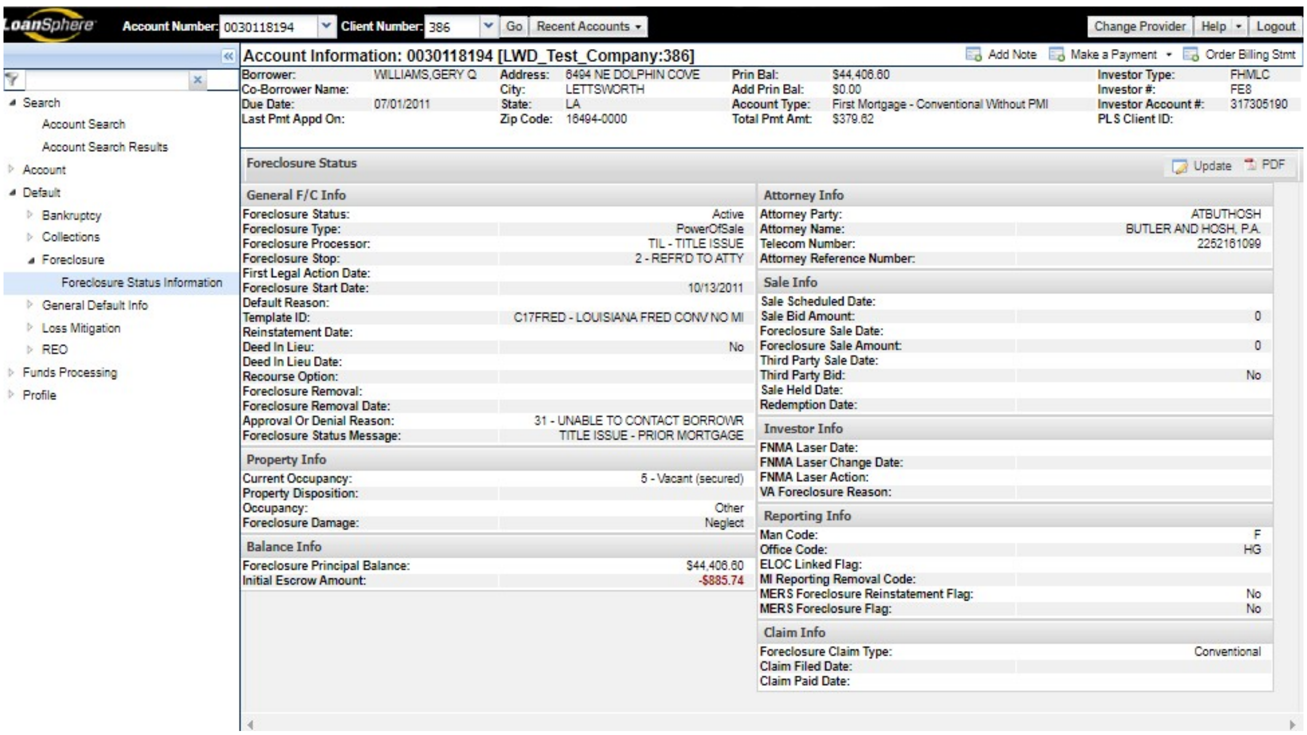
To preview the PDF file, click **Open** .

To save the PDF file, click **Save**.

6 Print, save, or close the PDF, as necessary.

Foreclosure Status Information

The Foreclosure Status Information view enables you to view, update, and generate a PDF for all foreclosure status information.



Update Foreclosure Status Information

1. Search for a loan.
2. Click **Foreclosure Status Information** in the navigation tree under Default >> Foreclosure.

If you do not have the appropriate privileges and permissions to view foreclosure status information, the Foreclosure Status Information view is not available.

   The Foreclosure Status Information page appears.

3. Click **Update**.

   The Update Foreclosure Status dialog box appears.

4. Update the fields.
5. Click **OK**.

   The updated field values appear in the Foreclosure Status section.

Generate Foreclosure Status Information to PDF

1 Search for a loan.

2 Click **Foreclosure Status Information** on navigation tree under Default >> Foreclosure.

If you do not have the appropriate privileges and permissions to view foreclosure status information, the Foreclosure Status Information view is not available.

The Foreclosure Status Information page displays the Foreclosure Status section.

3 Click **PDF**.

The File Download dialog box appears.

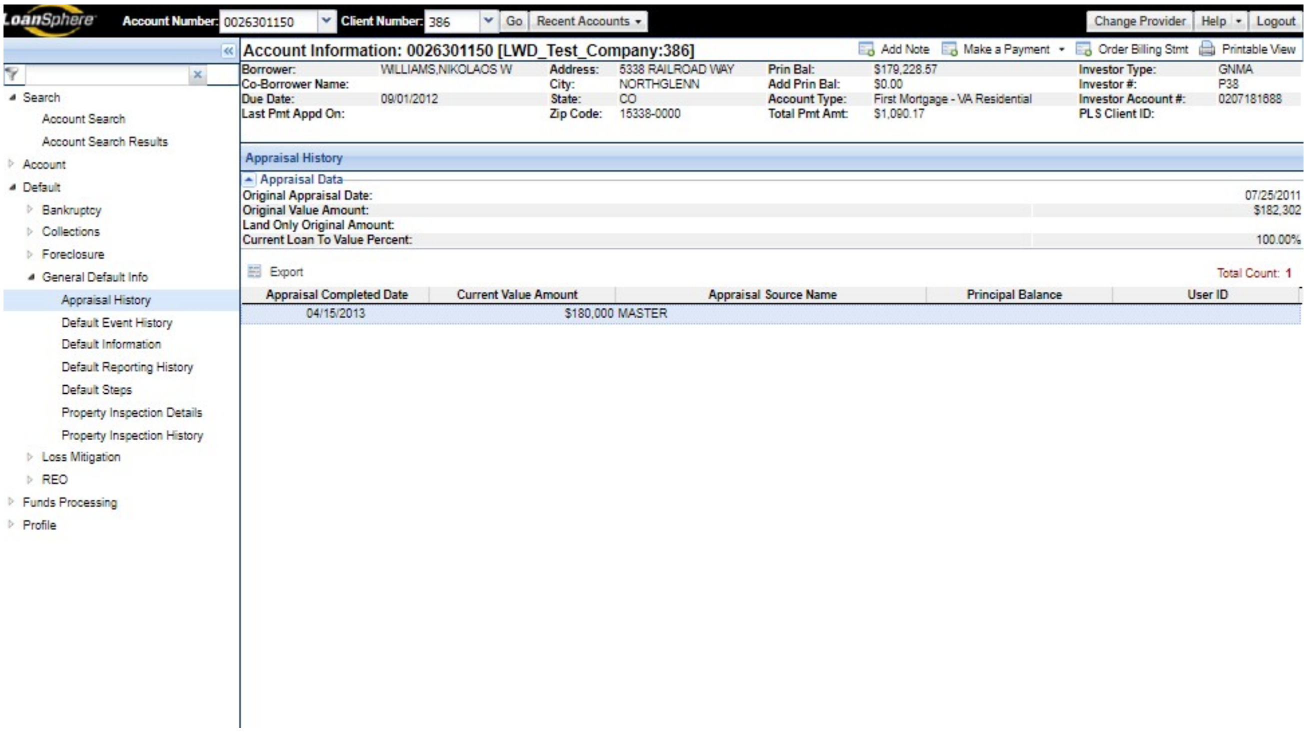
4 Do the following, as necessary:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

5 Print, save, or close the PDF, as necessary.

Appraisal History

Appraisal History enables users to view and export the default appraisal history of an account.



Tips:

- To view additional activity or to view activity for a certain time frame, change the start and end dates.
- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Default Event History

Default Event History, accessible from Default >> General Default Info >> in the navigation tree, enables you to view and export default history year-to-date information. Users can also generate default event history to PDF. You cannot update information through Default Event History.

View Default Event History

1. Search for an Account
2. Click **Default Event History** in the navigation tree under Default >> General Default Info.
3. The Default Event History page appears.
4. View the fields.
5. Do the following as necessary:
   - Generate the Default Event History to PDF format.
   - Export Default Event History
   - To continue working on the selected loan, make a different selection from the navigation tree.
   - To return to the search results, click Account Search Results in the navigation tree under Search.
   - Search for an account.

Export Default Event History

1. Open the Default Event History view.
2. Click Export at the tope of the Default Event History area.

   A window appears with the system name of the file and a selection of export formats:
   - Excel
   - Standard
3. Select a format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

Generate a Default Event History PDF

1. Open the Default Event History view.
2. Click **PDF**.
3. Type a name for the PDF file and select the appropriate rows and columns options.

The Rows to View> Page option generates transactions in the PDF that are currently displayed in the view, based on any filters that are applied in the view. The Rows to View> All option generates all transactions in the PDF, regardless of any filters applied.

4 Do the **following** as necessary.

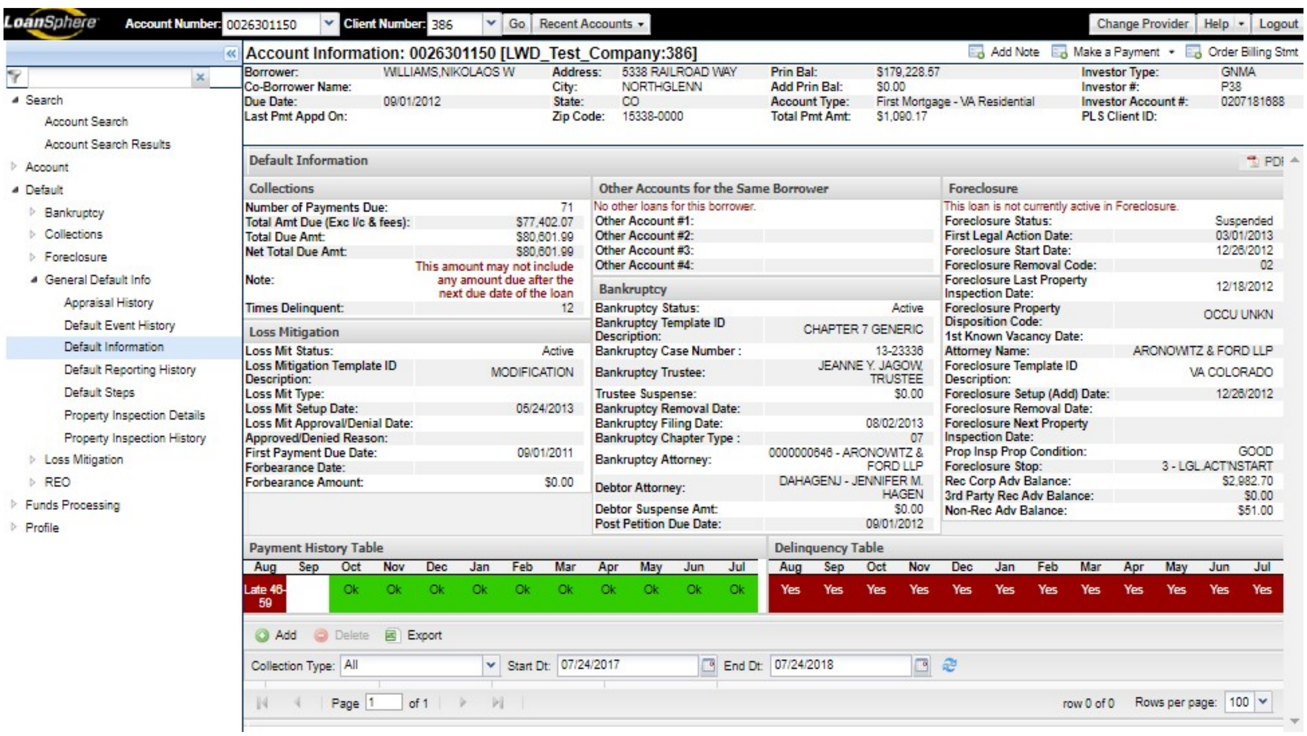
- To preview the PDF file, click Open.
- To save the PDF file, click Save.

5 Print, save, or close the PDF, as necessary.

Web Direct saves or displays the exported file with the default event history information.

Default Information

The Default Information view displays general default information from all the default areas, including collections and collection comments, loss mitigation, bankruptcy, and foreclosure.

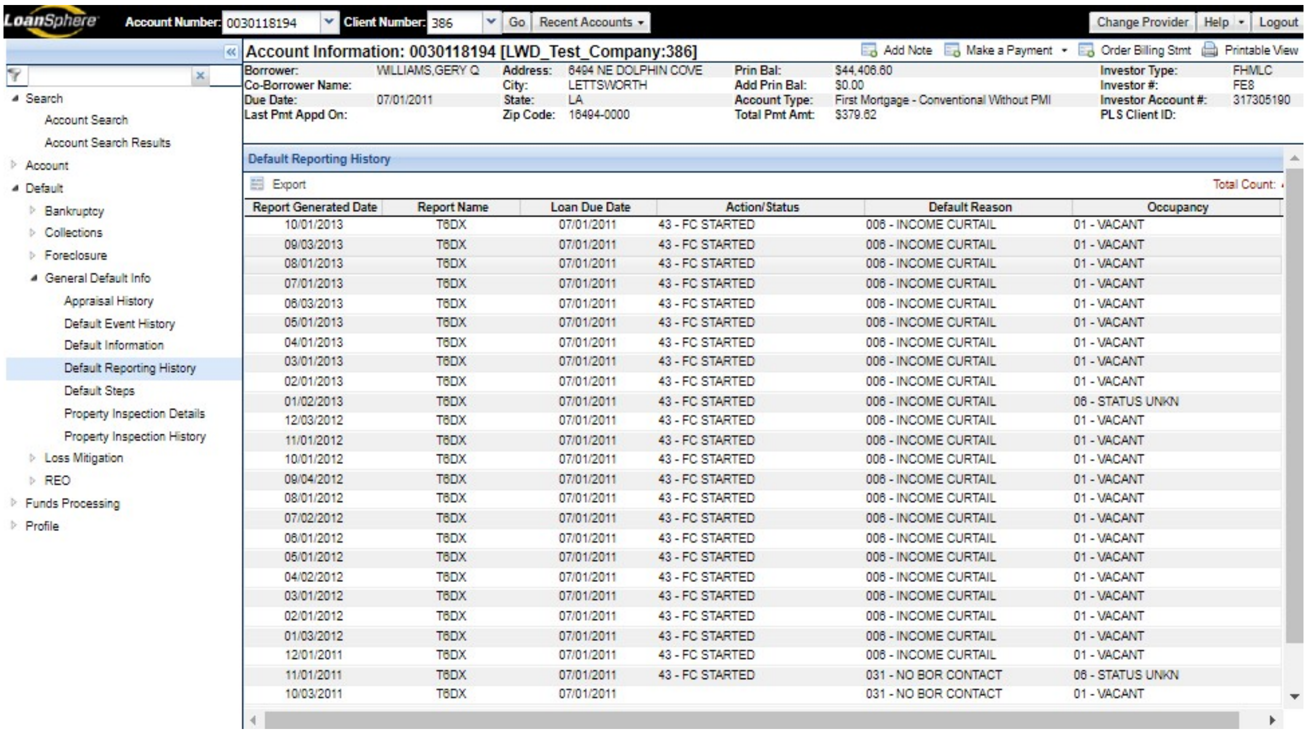


Tip:

- The collection comments section can also be exported. The Export button enables you to export the information from the grid to an Excel spreadsheet.

Default Reporting History

The Default Reporting History view displays the transaction history of default reporting associated with a loan.



Report Generated Date	Report Name	Loan Due Date	Action/Status	Default Reason	Occupancy
10/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
09/03/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
08/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
07/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
06/03/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
05/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
04/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
03/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
02/01/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
01/02/2013	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	06 - STATUS UNKN
12/03/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
11/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
10/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
09/04/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
08/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
07/02/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
06/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
05/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
04/02/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
03/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
02/01/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
01/03/2012	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
12/01/2011	T6DX	07/01/2011	43 - FC STARTED	006 - INCOME CURTAIL	01 - VACANT
11/01/2011	T6DX	07/01/2011	43 - FC STARTED	031 - NO BOR CONTACT	06 - STATUS UNKN
10/03/2011	T6DX	07/01/2011		031 - NO BOR CONTACT	01 - VACANT

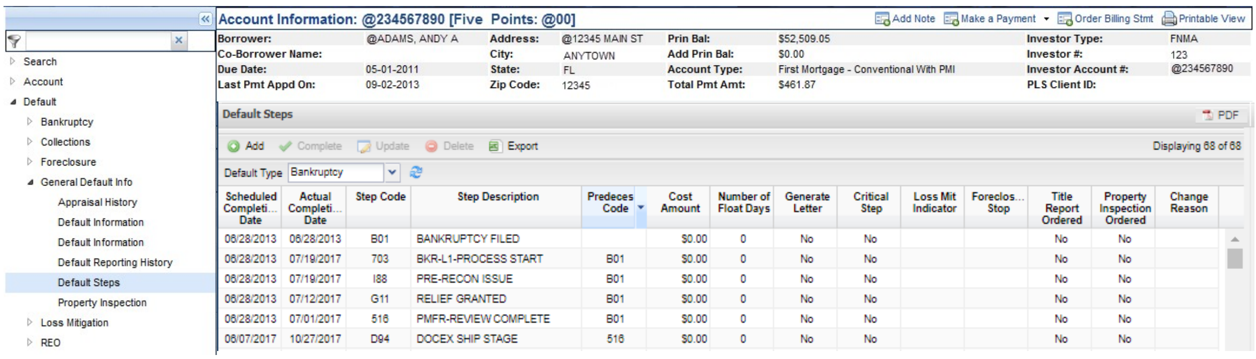
Tip:

- Click the right side of any column header to change the view's sort.

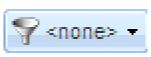
Default Steps

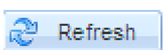
The Default Steps view displays each step in the default process, including foreclosure, bankruptcy, loss mitigation and REO. You can view, add, update, delete, complete, export, and generate to PDF steps in this view.

Choose the default area for the default steps you want to view.

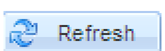


To filter only the information you want to view:

1 Click  and choose the field you want to filter.

2 Click  and all other transactions are filtered out of the view.

Tips:

- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The  button restores the default values.

Add Default Steps

1 View default steps.

2 At the top of the Default Steps area, select **Add**.

You can only add a bankruptcy or foreclosure step for a loan.

The Add Default Step dialog box appears.

3 In the Add Default Step dialog box, complete the fields as applicable.

4 Click **OK**.

The new step appears in the Default Steps window.

Update Default Steps

1 View default steps.

2 Select a step that is not completed that you want to update.

You can only update a bankruptcy or foreclosure step for a loan.

3 Click **Update**.

The Update Default Step dialog box appears.

4 Complete the fields.

5 Click **OK**.

The updated step appears in the Default Steps window.

Delete Default Steps

1 View default steps.

2 Select the step you want to delete.

You can only delete a bankruptcy or foreclosure step for a loan.

3 At the top of the Default Steps section, select **Delete**.

The Delete Default Step dialog box appears.

4 In the Delete Default Step dialog box, enter a free-form description in the **Change Reason** field.

5 Click **OK**.

The selected step is deleted from the Default Steps window.

Complete Default Steps

1 View default steps.

2 Select a step that you want to complete.

You can only complete a bankruptcy or foreclosure step for a loan.

3 At the top of the Default Steps area, click **Complete**.

The Complete Default Step dialog box appears.

4 Complete the fields.

5 Click **OK**.

The completed step appears in the Default Steps window.

Export the Default Steps Area

1 View default steps.

2 Click **Export**.

The Export Default Steps dialog box appears.

3 Type a name for the export file and select the appropriate format.

4 Click **OK**.

5 Do the following, as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

Generate Default Steps to PDF

1 View default steps.

2 Click **PDF**.

The PDF Options window appears.

3 Type a name for the PDF file and select the appropriate rows and columns options.

The Rows to View> Page option generates transactions that appear on the page to PDF based on any filters applied. The Rows to View> All option generates all transactions to the PDF, regardless of any filters applied.

4 Click **OK**.

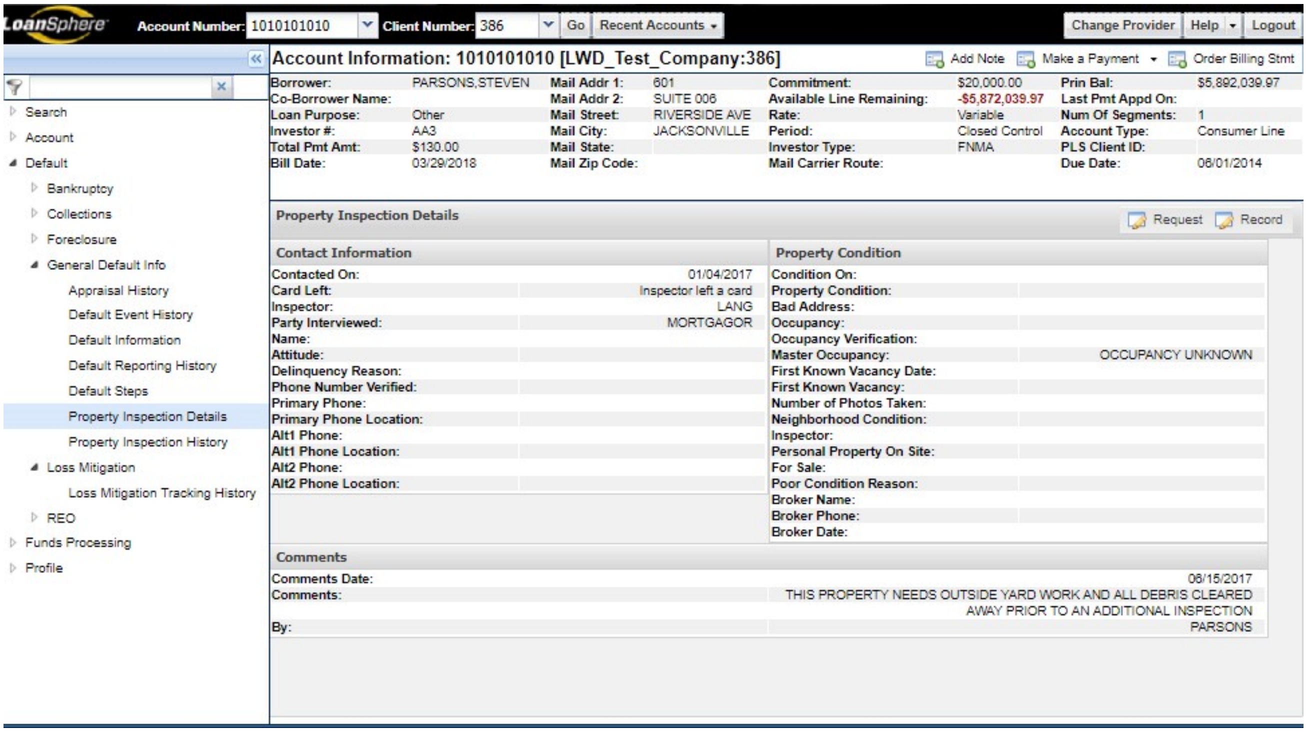
5 Do the following, as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

6 Print, save, or close the PDF, as necessary.

Property Inspection Details

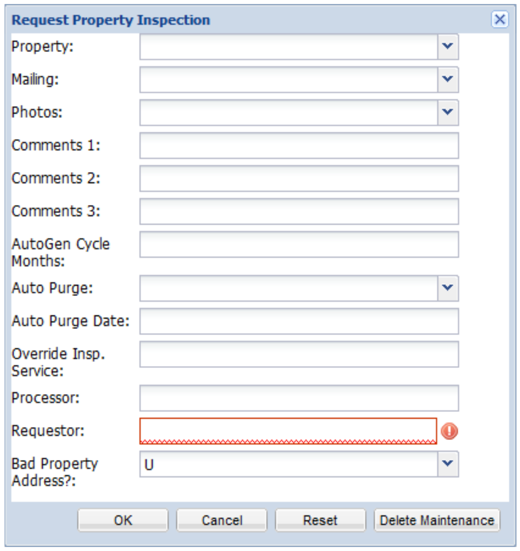
The Property Inspection Details view displays the details of the latest property inspection on a loan. Users can add and update property inspection request information and delete request information that was entered today. You can also record results of a property inspection.



Add Property Inspection Request

1. Open the Property Inspection Details view.
2. Click **Request**.

   The Add Property Inspection dialog box appears.



3 Complete the fields.

4 Click **OK** to save the changes.

The new property inspection details are saved and they appear on the Property Inspection Details window.

Delete Property Inspection Result Information

1 Open the Property Inspection Details view.

2 Click **Record**.

The Record Property Inspection dialog box appears.

3 Click **Delete Maintenance**.

A confirmation message appears.

4 Click **OK** to delete the property inspection result information recorded today.

A confirmation message appears indicating that the deletion was successful.

Delete Property Inspection Request Information

1 Open the Property Inspection Details view.

2 Click **Request**.

The Add Property Inspection dialog box appears.

3 Click **Delete Maintenance**.

A confirmation message appears.

4 Click **OK** to delete the property inspection request information entered today.

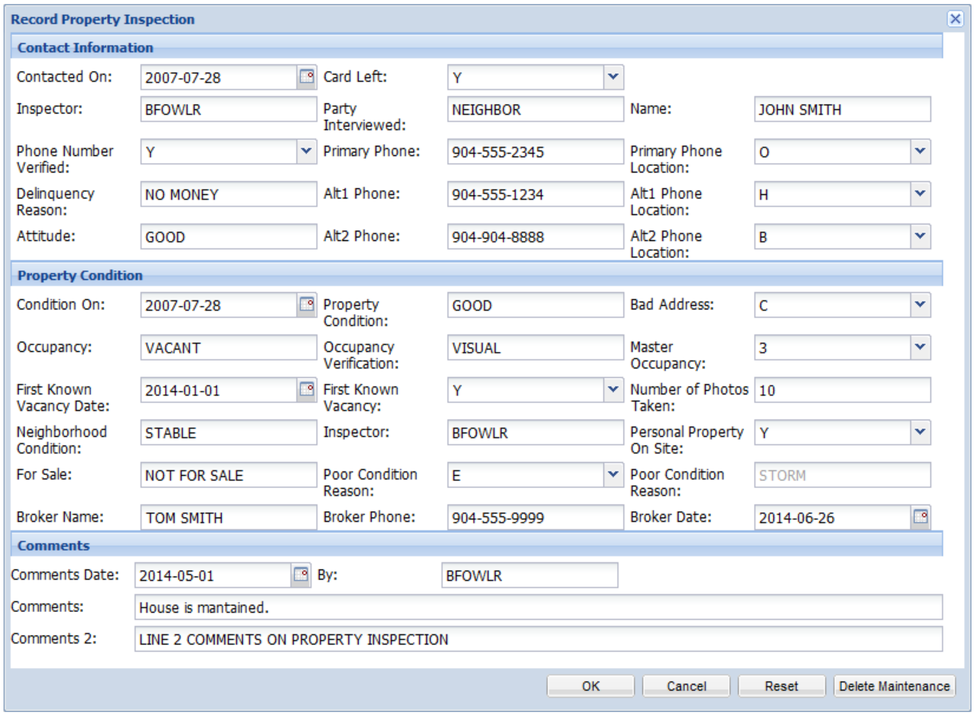
A confirmation message appears indicating that the deletion was successful.

Record New or Updated Property Inspection Results

1 Open the Property Inspection Details view.

2 Click **Record**.

The Record Property Inspection window appears.



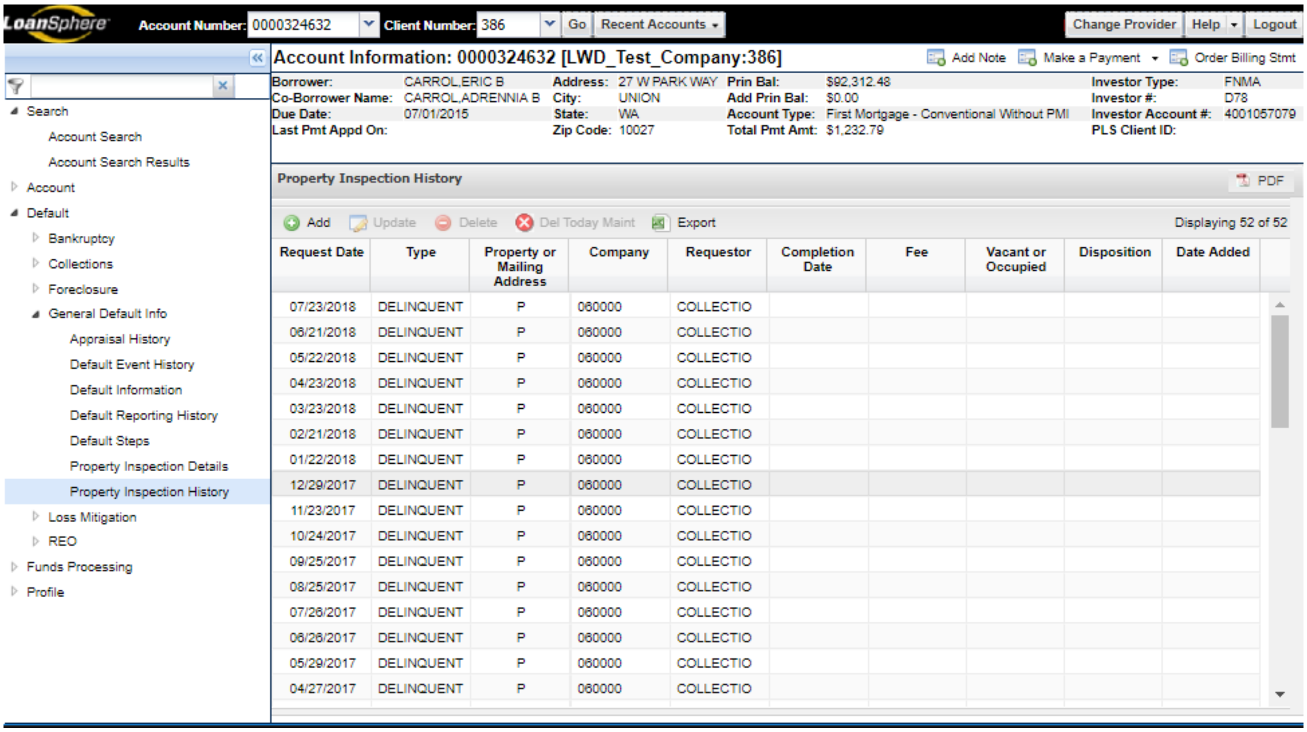
3 Enter the fields.

4 Click **OK**.

The new or updated property inspection information is saved and appears on the Property Inspection Details page.

Property Inspection History

The Property Inspection History view enables users to view, add, update, and delete property inspection history information on a loan, such as the request date, the type, the property or mailing address, the company, the requester, the completion date, the fee, vacant or occupied, disposition, date added, and the total number of reports.



Tip:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.

Add Property Inspection History Entry

1. Open the Property Inspection History view.
2. At the top of the Property Inspection History view, click **Add**.

   The Add Property Inspection History dialog box appears.
3. Complete the fields.
4. Click **OK** to save the changes.

   The new property inspection history entry is saved and it appears on the Property Inspection History window.

Delete Property Inspection History Entry

1. Open the Property Inspection History view.
2. In the main window, select the history entry that you want to delete.
3. At the top of the Property Inspection History view, click **Delete**.

   The **Delete this property inspection history item?** dialog box appears.
4. Click **OK** to delete the property inspection history entry.

   The property inspection history entry is removed from the Property Inspection History window.

Delete Property Inspection History Maintenance

1. Open the Property Inspection History view.
2. In the main window, select the history entry for which you want to delete today's maintenance.
3. At the top of the Property Inspection History view, click **Delete Maintenance**.

   A confirmation dialog box appears.
4. Click **Yes** to delete the maintenance for the property inspection history entry.

   The property inspection history entry maintenance is removed and the entry reverts to it's previous status in the Property Inspection History window.

Export Property Inspection History

1. Open the Property Inspection History view.
2. Click **Export**.

   The Export Property Inspection History dialog box displays.
3. Type a name for the export file and select the appropriate format.
4. Click **OK**.
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

   Web Direct saves or displays the exported file with the property inspection history information.

Update Property Inspection History Entry

1. Open the Property Inspection History view.
2. In the main window, select the history entry that you want to update.
3. Click **Update**.

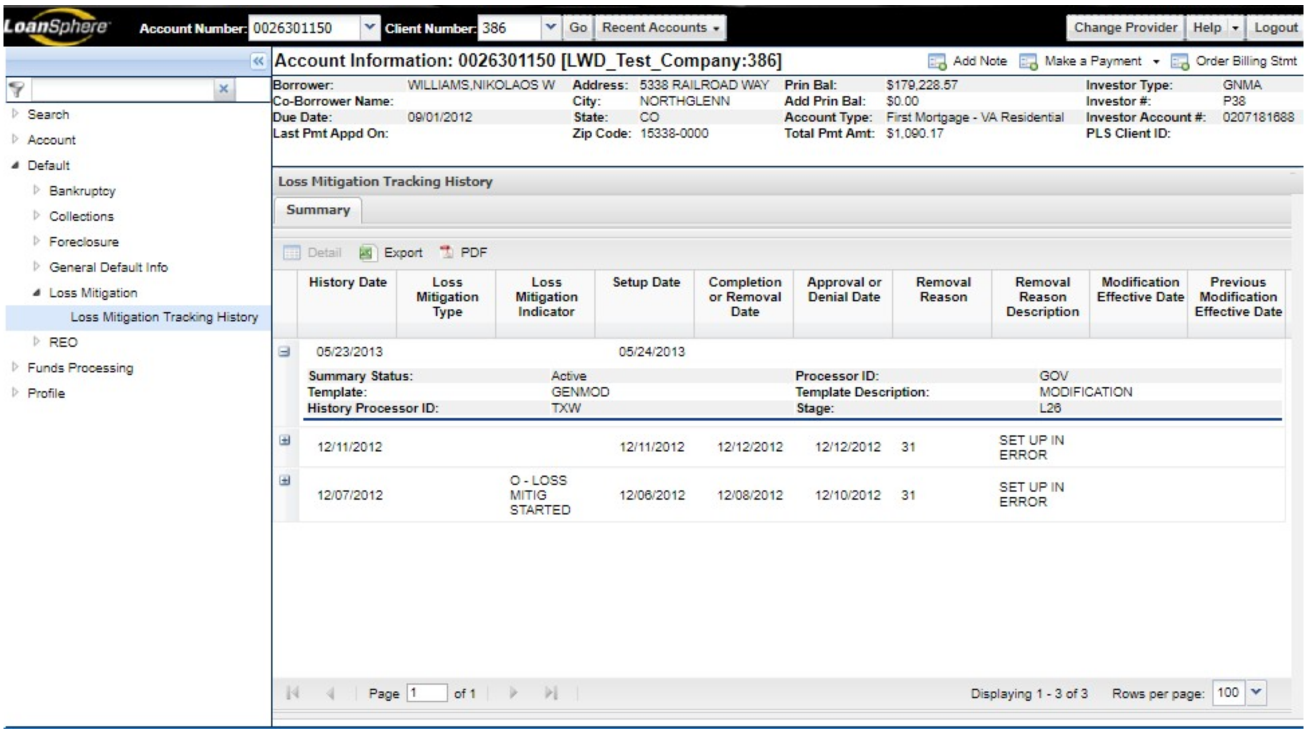
   The Update Property Inspection History dialog box appears.
4. Modify the fields.
5. Click **OK** to save the changes.

The updated property inspection history entry is saved and it appears on the Property Inspection History window.

Loss Mitigation Tracking History

The Loss Mitigation Tracking History view provides loss mitigation processors with the ability to view summaries of loss mitigation loan schedules and view details for specific summaries. Users can also export and generate PDF output for loss mitigation loan summary and detail information.

Summary Tab



View Loss Mitigation Tracking History – Summary Only

1 Search for a loan.

2 Click **Loss Mitigation Tracking History** in the navigation tree under Default >> Loss Mitigation.

The Summary tab in the Loss Mitigation Tracking History appears.

3 View the fields.

4 To adjust the summary fields that appear, do one of the following:

- Click the plus icon next to the loss mitigation tracking history item to display all summary fields.
- Click the drop-down arrow in one of the column headers, then click **Columns** and check or uncheck the desired fields to appear in the displayed columns.

5 Do the following, as necessary:

- View Loss Mitigation Tracking History - Summary and Detail.

- Export Loss Mitigation Tracking History.
- Generate Loss Mitigation Tracking History to PDF.
- To continue working on the selected loan, make a different selection from the navigation tree.
- Click **Account Search Results i**n the navigation tree under Search to return to the search results.
- Search for a loan.

View Loss Mitigation Tracking History – Summary and Detail

1 Search for a loan.

2 Click **Loss Mitigation Tracking History** in the navigation tree under Default >> Loss Mitigation.

The Summary tab in the Loss Mitigation Tracking History appears.

3 View the fields.

4 To adjust the summary fields that appear, do one of the following:

- Click the plus icon next to the loss mitigation tracking history item to display all summary fields.
- Click the drop-down arrow in one of the column headers, then click **Columns** and check or un-check the desired fields to appear in the columns.

5 To view detailed data for a summary item, do one of the following:

- Select the row for an item and click the **Detail** button.
- Double-click the row for an item.

A Detail tab opens displaying the detailed tracking history information for the account. View the fields.

6 Do the following, as necessary.

- Export Loss Mitigation Tracking History.
- Generate Loss Mitigation Tracking History to PDF.
- To continue working on the selected loan, make a different selection from the navigation tree.
- Click **Account Search Results** in the navigation tree under Search to return to the search results.
- Search for a loan.

Export Loss Mitigation Tracking History

1 Do one of the following:

- Open the Loss Mitigation Tracking History – Summary Only.
- Open the Loss Mitigation Tracking History – Summary and Detail.

2 Click **Export** on the Summary tab.

The exported file will display all summary fields that are selected to appear in the columns.

3 Type a name for the export file and select the appropriate format.

4 Click **OK**.

The File Download dialog box appears.

5 Do the following, as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

Web Direct saves or displays the exported file with the loss mitigation tracking history.

Generate Loss Mitigation Tracking History to PDF

1 View loss mitigation tracking history.

2 Click **PDF** at the top of the Summary or Detail tab in the Loss Mitigation Tracking History page.

The File Download dialog box appears.

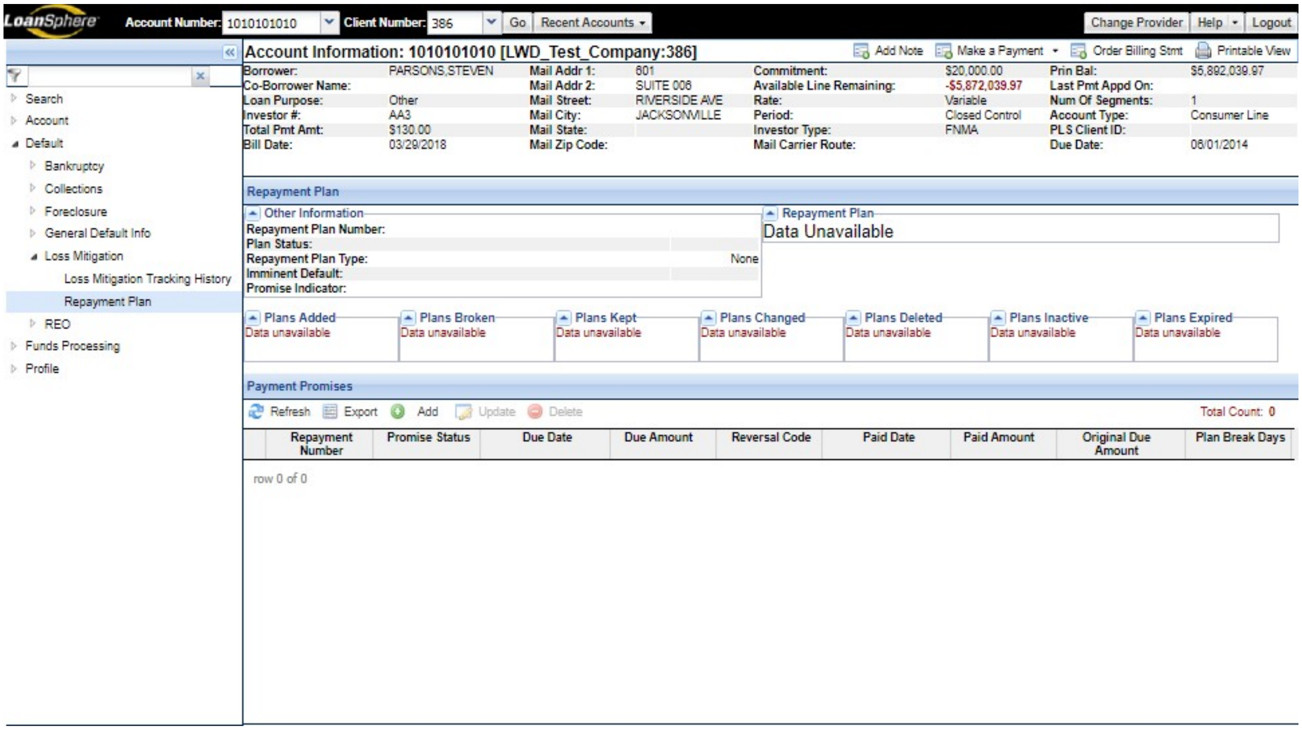
3 Do the following, as necessary:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

4 Print, save, or close the PDF, as necessary.

Repayment Plan

Repayment Plan, accessible from Default >> Loss Mitigation, enables you to view, add, update, export and delete repayment plan information such as the plan type, plan number, plan status. You can also create and manage payment promises associated with the repayment plan.



Open Repayment Plan

1. Search for an account.
2. Click **Repayment Plan** in the navigation tree under **Default** >> **Loss Mitigation**.

   The Repayment Plan page appears.
3. View the fields.
4. Do the following as necessary:
   - Add repayment plan
   - Update repayment plan entry
   - Export repayment plan information
   - Delete repayment plan entry
   - Add a payment promise
   - Edit a payment promise
   - Delete a payment promise
   - To continue working on the selected loan, make a different selection from the navigation tree.

- Click **Account Search Results** in the navigation tree under Search to return to thesearch results.

Add a Repayment Plan

1 Open the Repayment Plan view.

2 Click **Add**.

The Add Repayment Plan dialog box appears.

3 Complete the required fields.

4 Click calculate.

The system creates payment promises based on the following calculations:

- The total amount due -
- suspense amount +
- monthly late fee amount for each monthly payment included in the plan +
- any monthly payment amounts that will become due during the payment plan ÷
- plan length in months

  The system will also move Plan Break Days to each promise included.

5 If additional payment promises are needed, then click **New** in the **Promise to Pay** section and dothe following:

- Enter **the Due Date** (required)**.**
- Enter the **Due Amount** (required)**.**
- Enter the **Plan Break Days** (optional).
- Click **Save.**

The new promise to pay entry appears.

6 Click **OK**.

The confirmation window appears.

7 Click **OK**.

The new repayment plan is saved and appears on the Repayment Plan window.

Update a Replayment Plan

1 Open the Repayment Plan view.

2 In the main window, select the entry that you want to update.

3 Click **Update**.

The Update Repayment Plan Information dialog box appears.

4 Modify the fields.

5 Click **OK**.

The updated repayment plan is daved and it appears on the Repayment Plan window.

Delete a Payment Promise

1. Open the Repayment Plan view.
2. Click **Update**.

   The Update Repayment Plan dialog box appers.
3. Under Promises to Pay, select the promise to be deleted and click **Delete**.

   The system deletes the payment promise.

Export a Repayment Plan

1. Open the Repayment Plan view.
2. Click **Export**.

   The Export Promise to Pay dialog box displays.
3. Type a name for the export file and select the appropriate format.
4. Click **OK.**
5. Do the following, as necessary.
   - To preview the exported file, click **Open**.
   - To save the exported file, click **Save**.

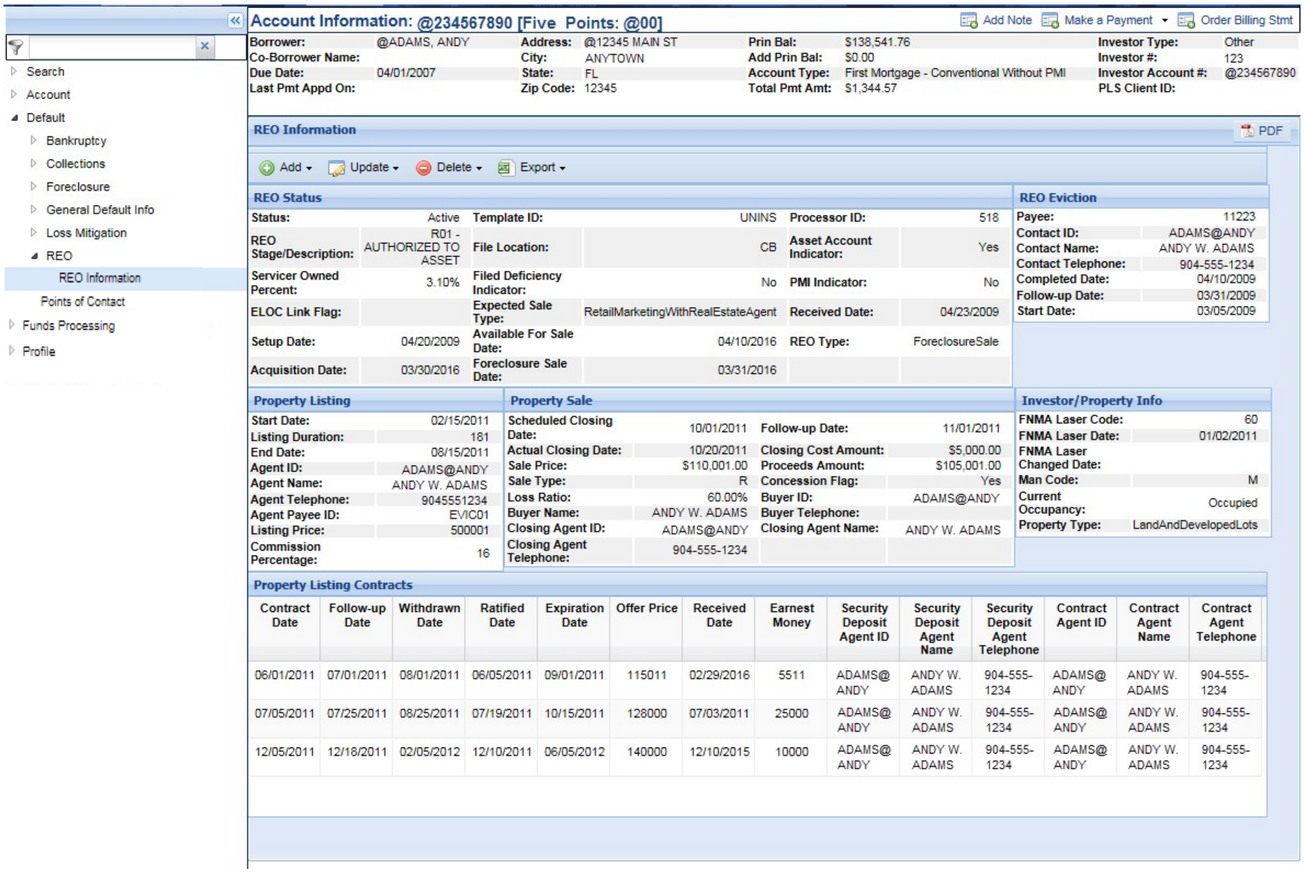
   Web Direct saves or displays the exported file with the repayment plan information.

REO Information

REO Information enables you to view property-related REO information and generate REO information to PDF. You can also export property listing contract information.

The REO Information view displays REO information from the REO1/STAT, REO1/EVIC, REO1/LIST, REO1/SALE and REO1/CONT windows in MSP. If the loan is not active in REO, a message appears in the REO Status section of the window.

You must have the appropriate privileges and permission to view real estate owned information. If you do not have the appropriate privileges and permissions, REO Information is not available to you.



View REO Information

1. Search for a loan.
2. Click **REO Information** in the navigation tree under Default >> REO.

   The REO Information page appears.
3. View the fields.
4. Filter, sort, print, and/or export information in the Property Listing Contracts section, as necessary.

Add REO Information

1. Open the REO Information view.
2. At the top of the REO Information window, click **Add**.

If the account is not active in Loss Mitigation, Foreclosure or REO, the Add function is not available in the REO Information view.

3. In the drop-down list, select one of the following REO Information areas to add information:

- REO Status/Eviction
- Property Listing

Property Listing is available for Add only if the **Start Date** and **Listing Price** fields are empty.

- Property Sale

Property Sale is available for Add only if the **Scheduled Closing Date** and **Sale Price** fields are empty.

- Property Listing Contracts

The add dialog box displays.

4 Complete the fields.

5 Click **OK**.

The newly added REO information appears in the REO Information view.

Update REO Information

1 Open the REO Information view.

2 At the top of the REO Information window, click **Update**.

3 In the drop-down list, select one of the following REO Information areas to update:

- REO Status/Eviction
- Property Listing

Property Listing is available for Update only if the **Start Date** and **Listing Price** fields are populated.

- Property Sale

Property Sale is available for Update only if the **Scheduled Closing Date** and **Sale Price** fields are populated.

- Property Listing Contracts

The update dialog box displays.

4 Complete the fields.

5 Click **OK**.

The updated REO information appears in the REO Information view.

Export REO Property Listing Contract Information

Search for a loan.

1 Click **REO Information** in the navigation tree under Default >> REO.

The REO Information page appears.

2 Click **Export** at the top of the REO Information window, then select the **Property Listing Contracts** option.

The Export dialog box appears.

3 Modify the **File Name** field as desired.

4 Select the desired export format:

- Excel
- Standard

5 If any columns are filtered out of the view, select one of the following options for Columns to Export:

- Page - Export the columns that are displayed on the page, without any columns that are filtered from the view.
- All - Export the data for all columns, including any columns that are currently filtered from the view.

6 Click **OK**.

7 Do one of the following:

- Click **Open** to view the exported file.
- Click **Save** to save the exported file.

Delete REO Information

1 Open the REO Information view.

2 At the top of the REO Information window, click **Delete**.

3 In the drop-down list, select one of the following REO Information areas to delete information:

- REO Status/Eviction
- Property Listing

Property Listing is available for Delete only if the **Start Date** and **Listing Price** fields are populated.

- Property Sale

Property Sale is available for Delete only if the **Scheduled Closing Date** and **Sale Price** fields are populated.

- Property Listing Contracts

A confirmation message displays asking you to confirm whether you want to delete the selected information.

4 Click **OK** to delete the selected REO information.

The deleted REO information no longer appears in the REO Information view.

Generate REO Information to PDF

1 Search for a loan.

2 Click **REO Information** in the navigation tree under Default >> REO.

The REO Information page appears.

3 Click **PDF**.

The PDF Options dialog box displays.

4 Select one of the following:

- Page - Generate all of the rows currently displayed on the page to PDF.
- All - Generate all available rows to PDF.

5 Click **OK**.

The File Download dialog box appears.

6 Do the following, as necessary:

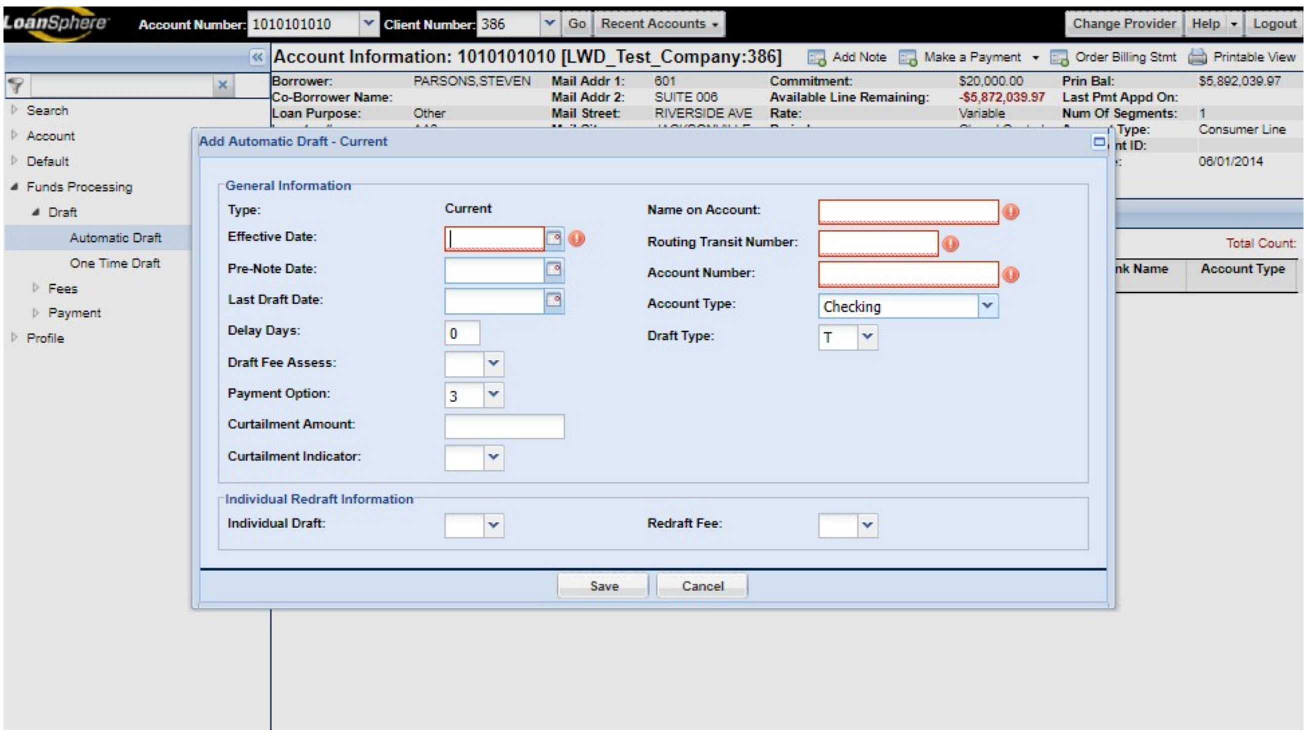
- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

Funds Processing

Automatic Draft

Automatic Draft enables users to view, export, add, update, and delete automatic draft (recurring ACH payments) information.

- You can view current, pending, and previous records.
- Previous records are view-only.
- If you attempt to add a record when a current record exists, the system adds the record as a pending record. If no current record exists, the record you add becomes the current record.



Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The Refresh button restores the default values.

Add Automatic Drafts

1 Click **Automatic Draft** in the navigation tree under Funds Processing >> Draft.

The Automatic Draft view appears.

2 Click **Add/Update**.

3 Complete the fields.

4 Click **Save**.

The newly added automatic draft information appears on the Automatic Draft page.

Update Automatic Drafts

1 Click **Draft** in the navigation tree under Funds Processing >> Automatic Draft.

The Automatic Draft view appears. You can then export the automatic draft information.

2 Click the row of the automatic draft you want to update.

3 Click **Add/Update**.

4 Complete the fields.

5 Click **Save**.

The updated automatic draft information appears on the Automatic Draft page.

Delete Automatic Drafts

1 Click **Draft** in the navigation tree under Funds Processing >> Automatic Draft.

The Automatic Draft view appears.

2 Click the row of the automatic draft you want to delete.

3 Click **Delete/Undo**.

A confirmation message appears.

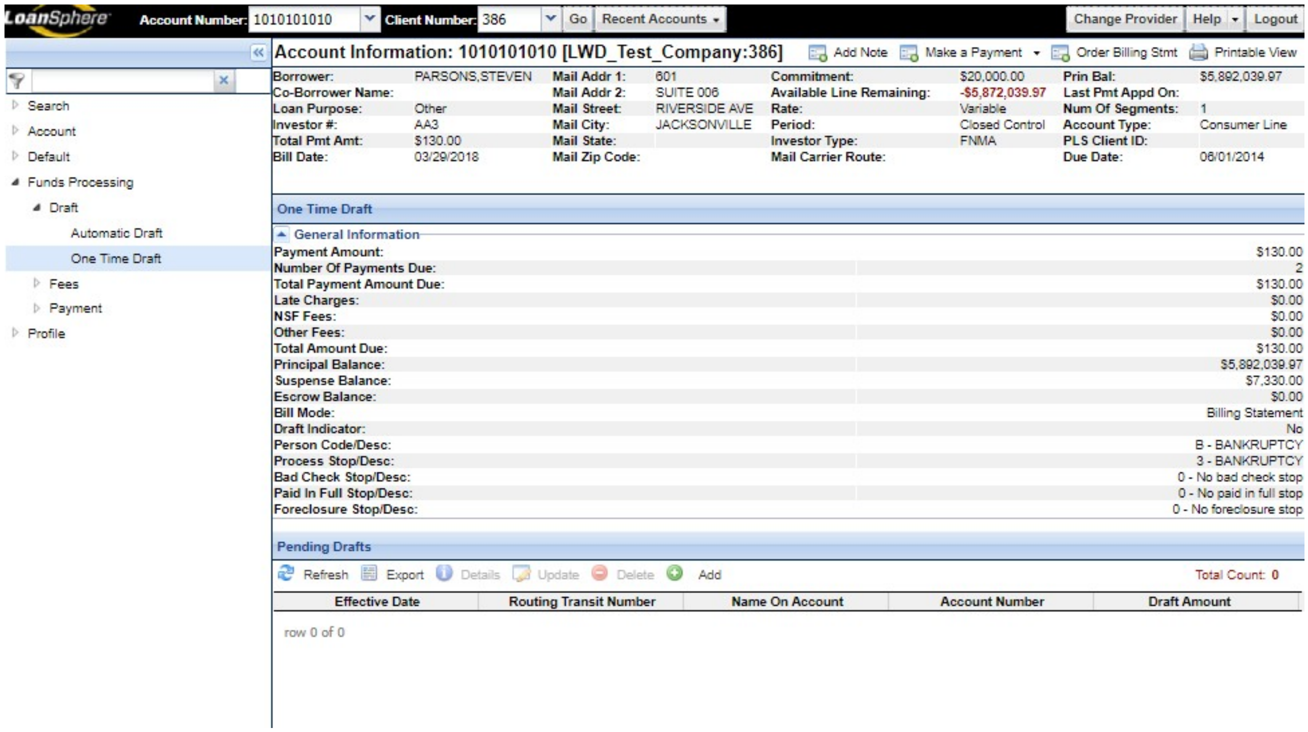
4 Click **OK**.

Web Direct deletes the automatic draft information from the Automatic Draft page.

One Time Draft

One Time Draft enables users to view, add, update, and delete one time draft information. You can update the following information:

- Payment details
- Fees and corporate advances
- Bank and requestor information

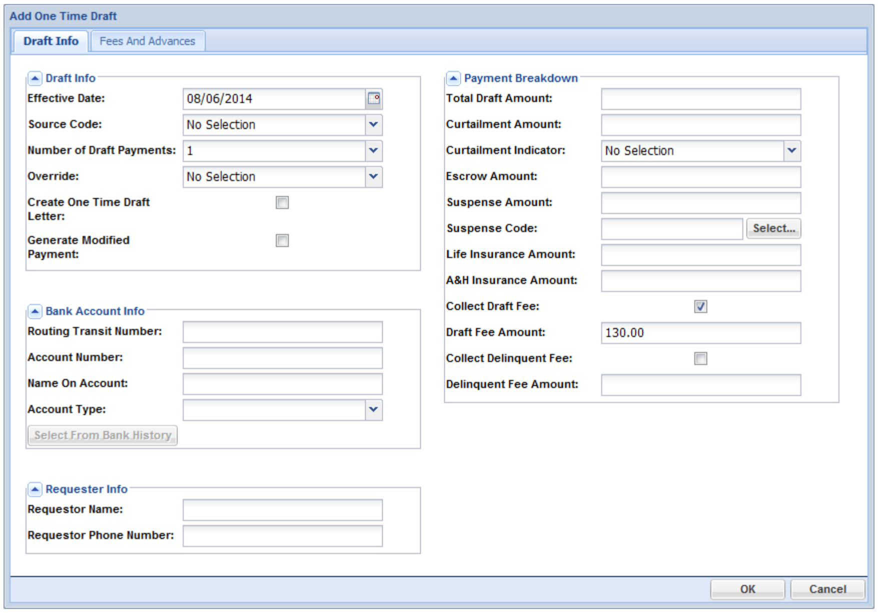


Add One Time Drafts

1. Open the One Time Draft view.
2. Click **Add**.

   The Please Enter Effective Date dialog box appears.
3. Enter the effective date of the draft.
4. Click **OK**.

   The Add One Time Draft window appears.



5 Complete the fields.

> To add fee and corporate advance information, use the Fees and Advances tab.

6 Click **OK**.

The drafting information appears as a pending draft.

Update One Time Drafts

1 Open the One Time Draft view.

2 Select the pending draft you want to update.

3 Click **Update**.

4 Update the fields.

> To update fee and corporate advance information, use the Fees and Advances tab.

5 Click **OK**.

The drafting information updates and appears as a pending draft.

Delete One Time Drafts

1 Open the One Time Draft view.

2 Select the pending draft you want to delete.

3 Click **Delete**.

A confirmation message appears.

4 Click **Yes**.

The system removes the pending draft from the One Time Draft page under Pending Drafts.

Consumer Fees

The Consumer Fees view displays consumer fees that apply to control records and the conditions for the assessment of fees.

To filter only the information you want to view:

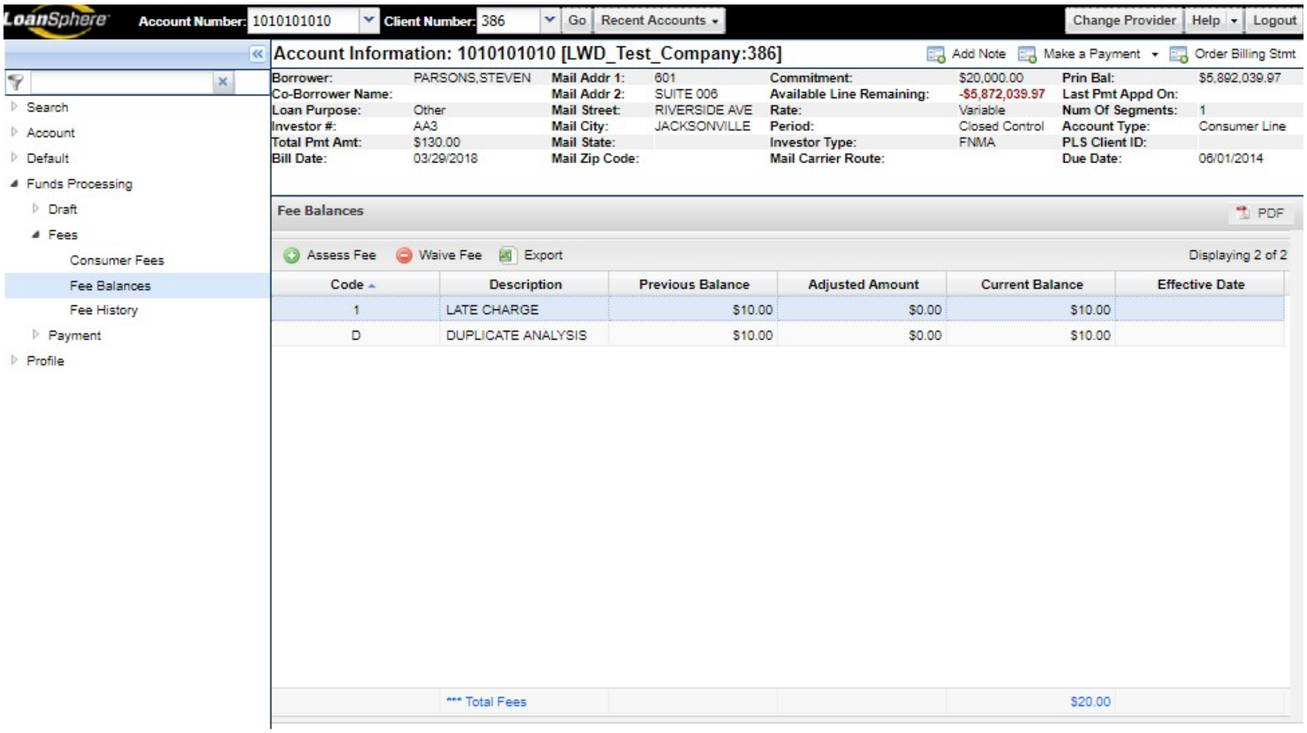
1. Click No Selection> and choose the field you want to filter.
2. Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Fee Balances

The Fee Balances view displays available fee balances on a loan and enables you to waive/assess fees, export and generate to PDF the Fee Balances area.



To filter only the information you want to view:

1. Click <none> and choose the field you want to filter.
2. Click Refresh and all other transactions are filtered out of the view.

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

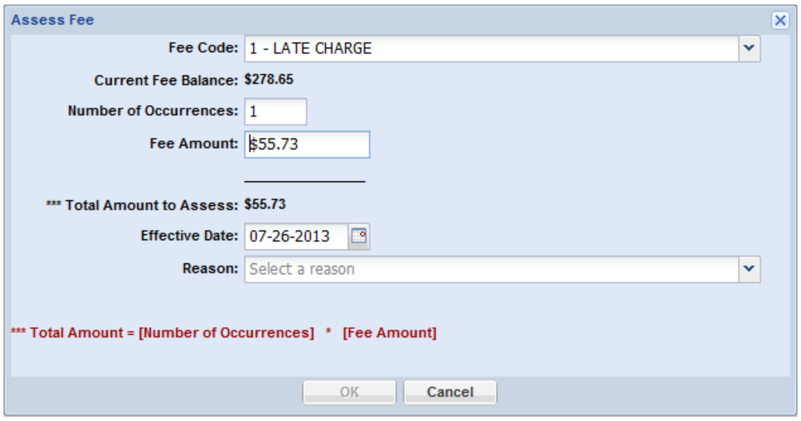
Assess a Fee

1 Click **Fee Balances** in the navigation tree under Funds Processing >> Fees.

The Fee Balances view displays all of the loan's fee balances in alphanumeric order by fee code.

2 Click **Assess Fee**.

The Assess Balance dialog box appears.



3 Complete the fields.

4 Click **OK**.

A confirmation message appears.

5 Click **Yes**.

The Assess Fee dialog box displays a message indicating that the fee assessment was successful.

6 Click **OK**.

The assessed fee appears in the Fee Balances view.

The system sends the request to MSP for processing through the Late Chg, NSF, and Fee Adjustment screen (PMTA) in the Cashiering Workstation.

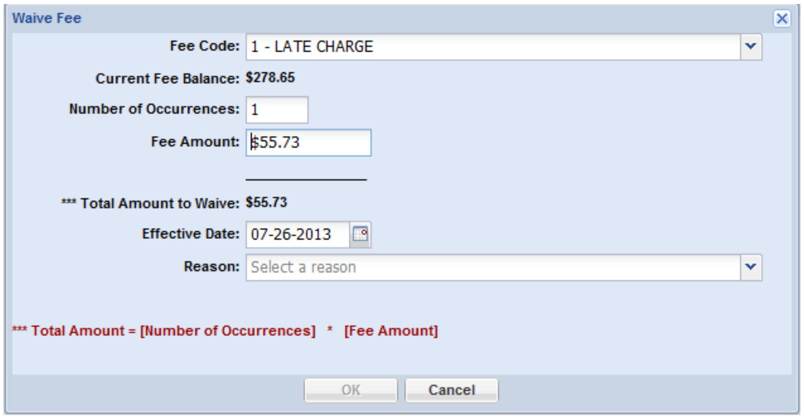
Waive a Fee

1 Click **Fee Balances** in the navigation tree under Funds Processing >> Fees.

The Fee Balances view displays all of the loan's fee balances in alphanumeric order by fee code.

2 Select the code that you want to waive then click **Waive Fee**.

The Waive Fee dialog box appears.



3 Complete the fields.

4 Click **OK**.

A confirmation message appears.

5 Click **Yes**.

The Waive Fee dialog box displays a message indicating that the fee was waived successfully.

6 Click **OK**.

The waived fee is updated on the Fee Balances view.

Export the Fee Balance Area

1 Click **Export** at the top of the Fee Balances area and make a selection from the drop-downlist.

The File Download dialog box appears.

2 Do the following as necessary.

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.

Generate Fee Balances to PDF

1 Open the Fee Balances view.

2 Click **PDF**.

The PDF Options window appears

3 Type a name for the PDF file and select the appropriate rows and columns options

The Rows to View> Page option generates transactions that appear on the page to PDF, based on any filters applied. The Rows to View > All option generates all transactions to the PDF, regardless of any filters applied.

4 Click **OK**.

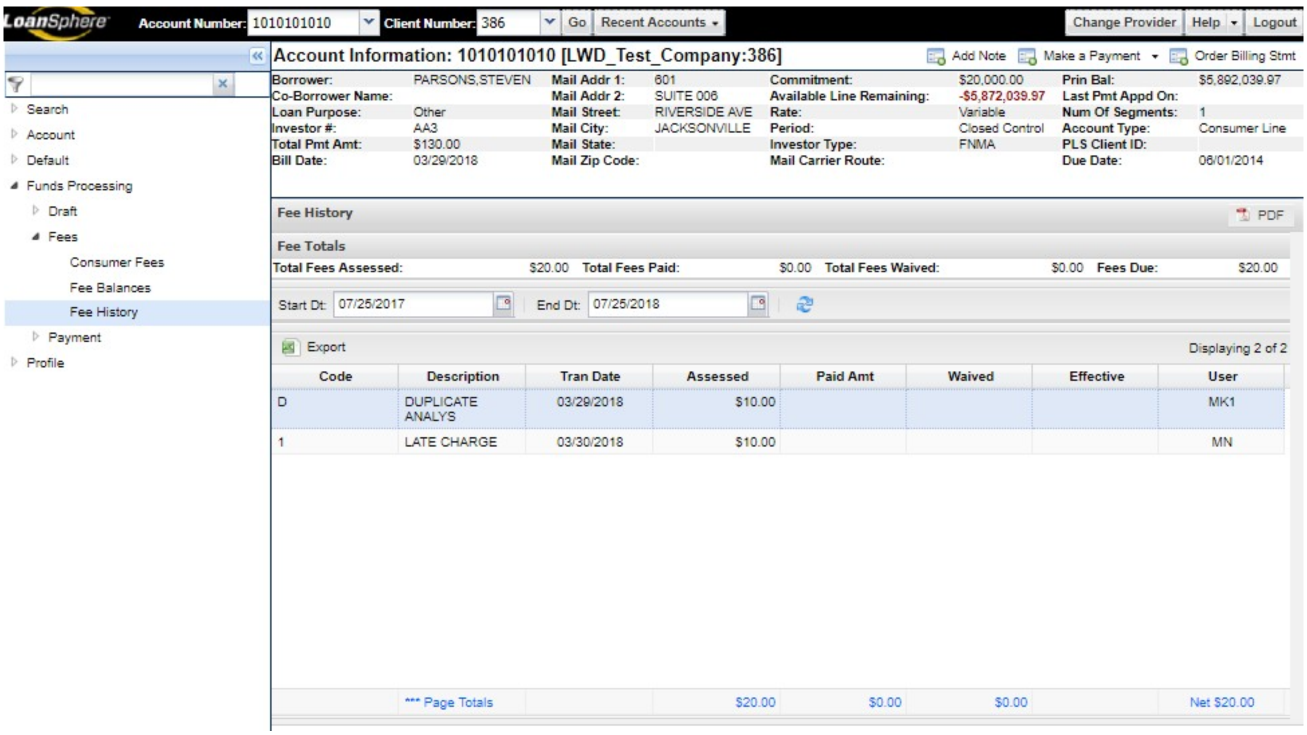
5 Do the following as necessary:

- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.

6 Print, save, or **close** the PDF, as necessary.

Fee History

The Fee History view displays the dollar amount and date of all fee assessments, fees paid, and fees waived for a loan.



To filter only the information you want to view:

1 Click [<none>] and choose the field you want to filter.

2 Click [Refresh] and all other transactions are filtered out of the view.

Tips:

- The view defaults to the last 12 months of activity. To view additional activity or to view activity for a certain time frame, change the start and end dates.
- The [Export] button enables you to export the information from the grid to an Excel spreadsheet.
- The [Printable View] feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- The [Refresh] button restores the default values.

Generate Fee History to PDF

1 View Fee History area.

2 Click **PDF** at the top of the Fee History area.

The PDF Options window appears.

3 **Type** a name for the PDF file and select the appropriate rows and columns options.

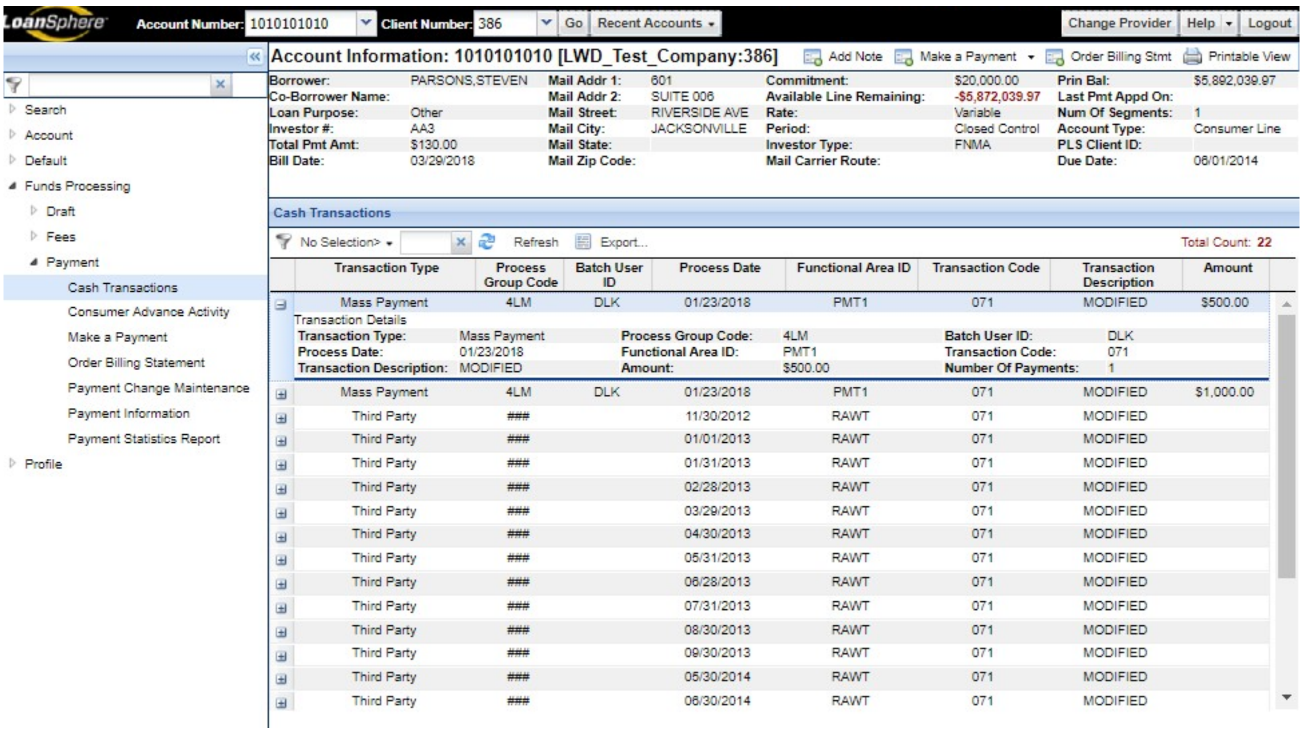
4 Click **OK**.

5 Do the following, as necessary.

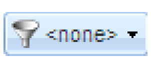
- To preview the PDF file, click **Open**.
- To save the PDF file, click **Save**.
- Print, save, or close the PDF, as necessary.

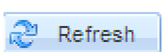
Cash Transactions

The Cash Transactions view displays information on monetary transactions that have been shadow-posted (pending a processing cycle for applying due date and balance changes to the loan), the type and amount of the transaction, and any additional details of the transaction.

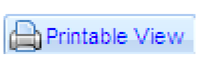
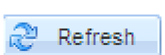


To filter only the information you want to view:

1 Click  and choose the field you want to filter.

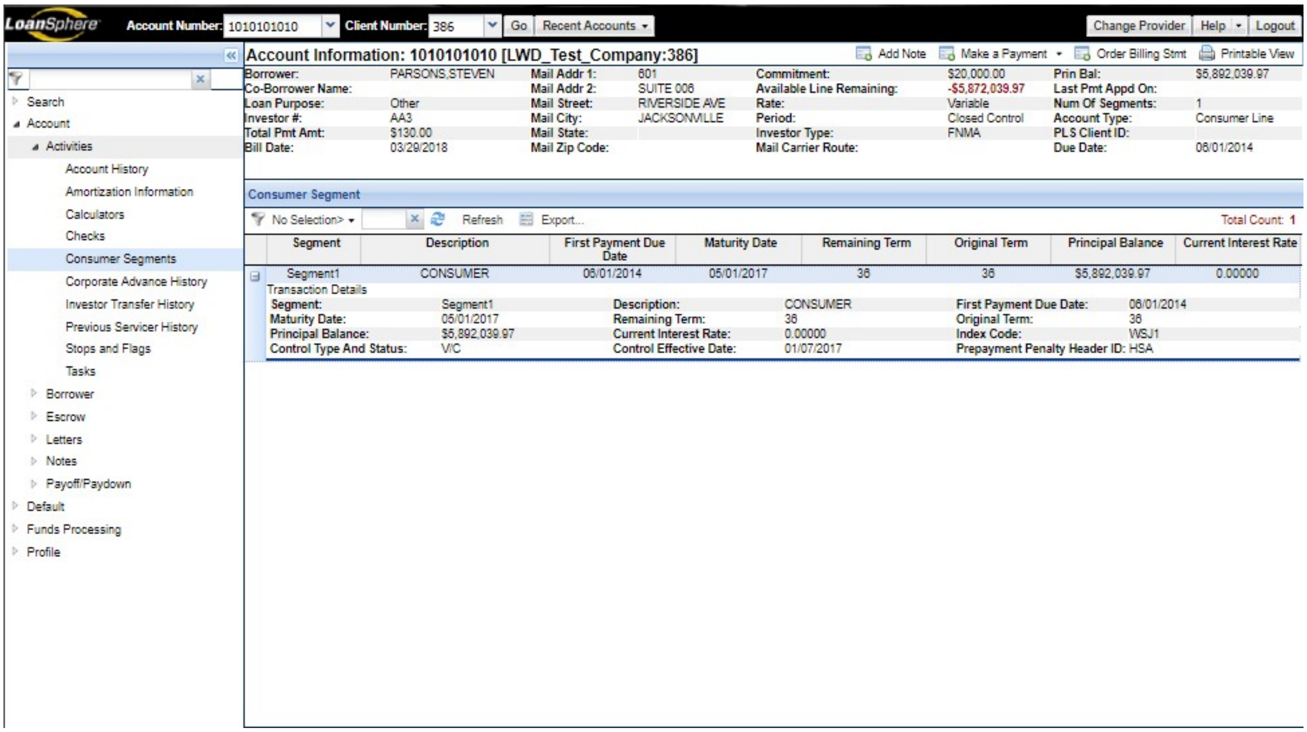
2 Click  and all other transactions are filtered out of the view.

Tips:

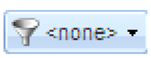
- The  feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The  button restores the default values.

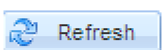
Consumer Advance Activity

The Consumer Advance Activity view displays current advance status information. If you have the security, you can create advances, reversals, and holds for consumer accounts.



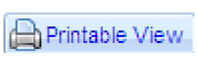
To filter only the information you want to view:

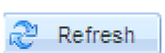
1 Click  and choose the field you want to filter.

2 Click  and all other transactions are filtered out of the view.

Tips:

- The view defaults to the last 12 months of activity. To view additional activity or to view activity for a certain time frame, change the start and end dates.
- The  button enables you to export the information from the grid to an Excel spreadsheet.

- The  feature enables you to print the view in its entirety in a user-friendly manner.

- Click the right side of any column header to change the view's sort.
- The  button restores the default values.

Consumer Advances

To add advances (draws), reversals, or holds, or to update or delete a transaction:

1. Open the Consumer Activity view.
2. Click one of the following buttons:
   - Add Advance
   - Add Reversal
   - Add Hold
   - Update
   - Delete
3. Enter the appropriate information to complete the requested transaction.
4. Click **OK**.

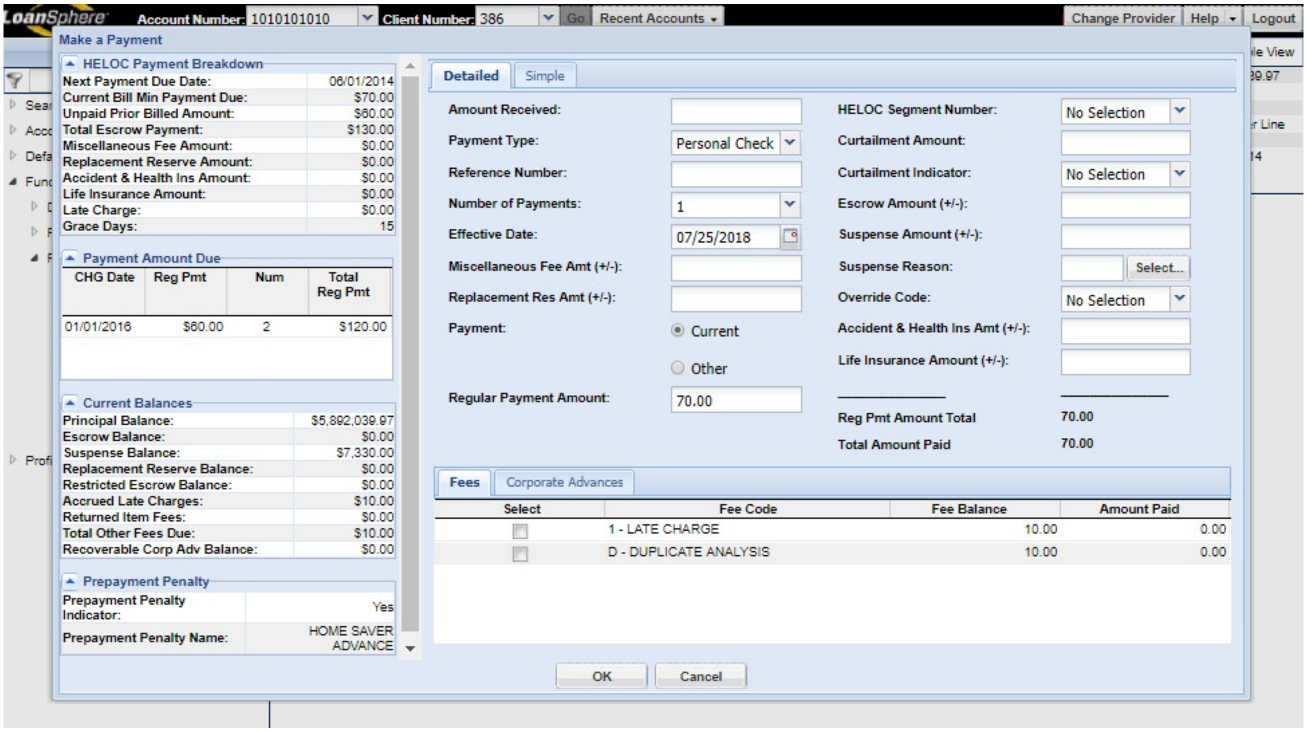
   The transaction is complete and appears in the history window.

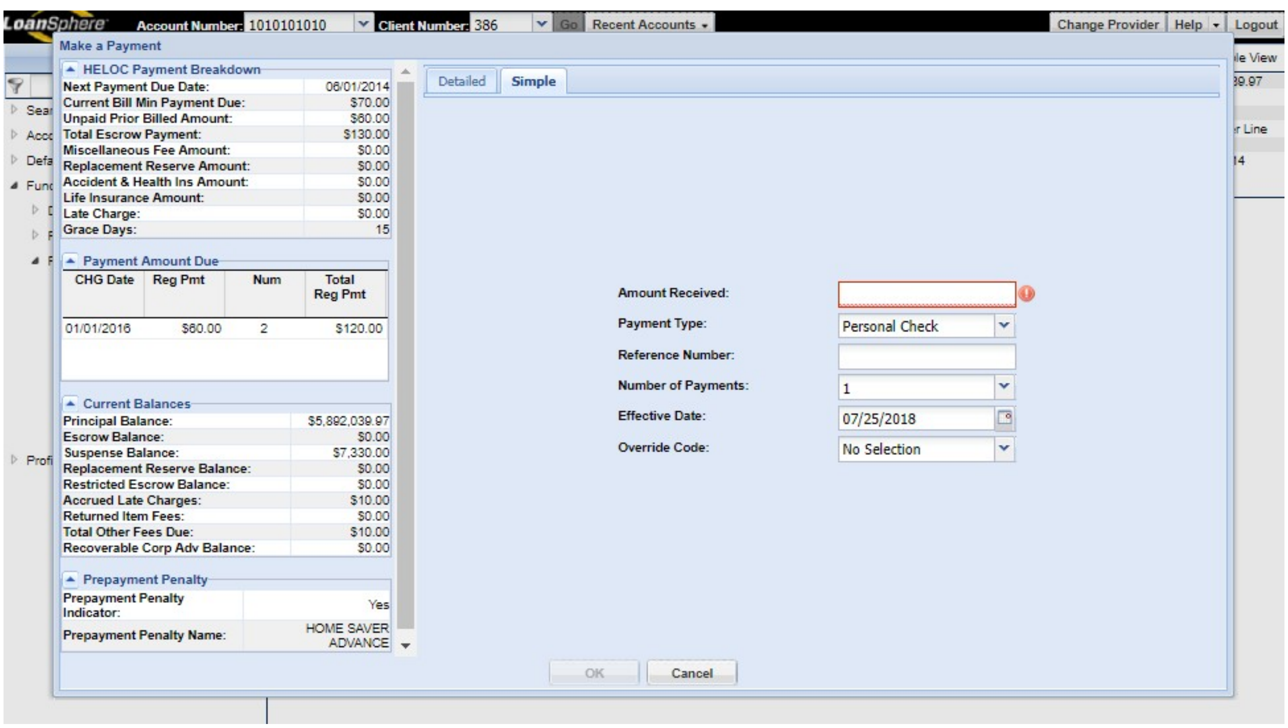
Make a Payment

The Make a Payment view enables you to apply detailed payments, principal curtailments, fees, escrow, and suspense, or you can apply a simple (unspecified) payment.

You can access the Make a Payment window from the left pane or from the toolbar.

For additional information refer to the “Web Direct Make a Payment” web-based training course in SkillPort.


LoanSphere
Account Number: 1010101010
Client Number: 386
Go
Recent Accounts
Change Provider
Help
Logout
Make a Payment
HELOC Payment Breakdown
Next Payment Due Date: 06/01/2014
Current Bill Min Payment Due: $70.00
Unpaid Prior Billed Amount: $60.00
Total Escrow Payment: $130.00
Miscellaneous Fee Amount: $0.00
Replacement Reserve Amount: $0.00
Accident & Health Ins Amount: $0.00
Life Insurance Amount: $0.00
Late Charge: $0.00
Grace Days: 15
Payment Amount Due
CHG Date | Reg Pmt | Num | Total Reg Pmt
01/01/2016 | $60.00 | 2 | $120.00
Current Balances
Principal Balance: $5,892,039.97
Escrow Balance: $0.00
Suspense Balance: $7,330.00
Replacement Reserve Balance: $0.00
Restricted Escrow Balance: $0.00
Accrued Late Charges: $10.00
Returned Item Fees: $0.00
Total Other Fees Due: $10.00
Recoverable Corp Adv Balance: $0.00
Prepayment Penalty
Prepayment Penalty Indicator: Yes
Prepayment Penalty Name: HOME SAVER ADVANCE
Detailed
Simple
Amount Received:
Payment Type: Personal Check
Reference Number:
Number of Payments: 1
Effective Date: 07/25/2018
Miscellaneous Fee Amt (+/-):
Replacement Res Amt (+/-):
Payment:
Current
Other
Regular Payment Amount: 70.00
HELOC Segment Number: No Selection
Curtailment Amount:
Curtailment Indicator: No Selection
Escrow Amount (+/-):
Suspense Amount (+/-):
Suspense Reason:
Select...
Override Code: No Selection
Accident & Health Ins Amt (+/-):
Life Insurance Amount (+/-):
Reg Pmt Amount Total 70.00
Total Amount Paid 70.00
Fees
Corporate Advances
Select | Fee Code | Fee Balance | Amount Paid
1 - LATE CHARGE | 10.00 | 0.00
D - DUPLICATE ANALYSIS | 10.00 | 0.00
OK
Cancel


LoanSphere
Account Number: 1010101010
Client Number: 386
Go
Recent Accounts
Change Provider
Help
Logout
Make a Payment
HELOC Payment Breakdown
Next Payment Due Date: 06/01/2014
Current Bill Min Payment Due: $70.00
Unpaid Prior Billed Amount: $60.00
Total Escrow Payment: $130.00
Miscellaneous Fee Amount: $0.00
Replacement Reserve Amount: $0.00
Accident & Health Ins Amount: $0.00
Life Insurance Amount: $0.00
Late Charge: $0.00
Grace Days: 15
Payment Amount Due
CHG Date | Reg Pmt | Num | Total Reg Pmt
01/01/2016 | $60.00 | 2 | $120.00
Current Balances
Principal Balance: $5,892,039.97
Escrow Balance: $0.00
Suspense Balance: $7,330.00
Replacement Reserve Balance: $0.00
Restricted Escrow Balance: $0.00
Accrued Late Charges: $10.00
Returned Item Fees: $0.00
Total Other Fees Due: $10.00
Recoverable Corp Adv Balance: $0.00
Prepayment Penalty
Prepayment Penalty Indicator: Yes
Prepayment Penalty Name: HOME SAVER ADVANCE
Detailed
Simple
Amount Received:
Payment Type: Personal Check
Reference Number:
Number of Payments: 1
Effective Date: 07/25/2018
Override Code: No Selection
OK
Cancel

Make Account Payments

1 Open the Make a Payment view.

2 Complete the fields on the Detailed or Simple tab.

Field requirements vary depending on the type of account.
- **Batch ID** is required for Simple and Detailed payments if the user has an MSP ID.
- **Regular Payment Amount** is required and is available for all loans.
- **Billed and Unpaid Amount** is required for HELOC loans.

3 To add, modify, or delete fees, do one of the following:

- On the Detailed >> Fees tab, click **Add**, select the fee code, and enter the fee amount.
- On the Detailed >> Fees tab, click the fee you want to modify, and make the changes.
- On the Detailed >> Fees tab, click the fee you want to remove, and click **Delete**.

4 Click **Save**.

5 Click **OK**.

The following message appears: **Payment applied. Print a receipt?**

6 To print a receipt, click **Yes**.

A separate window displays a receipt that you can print. The payment posts to MSP following the nightly batch cycle.

7 To close the Make A Payment page, click **OK**.

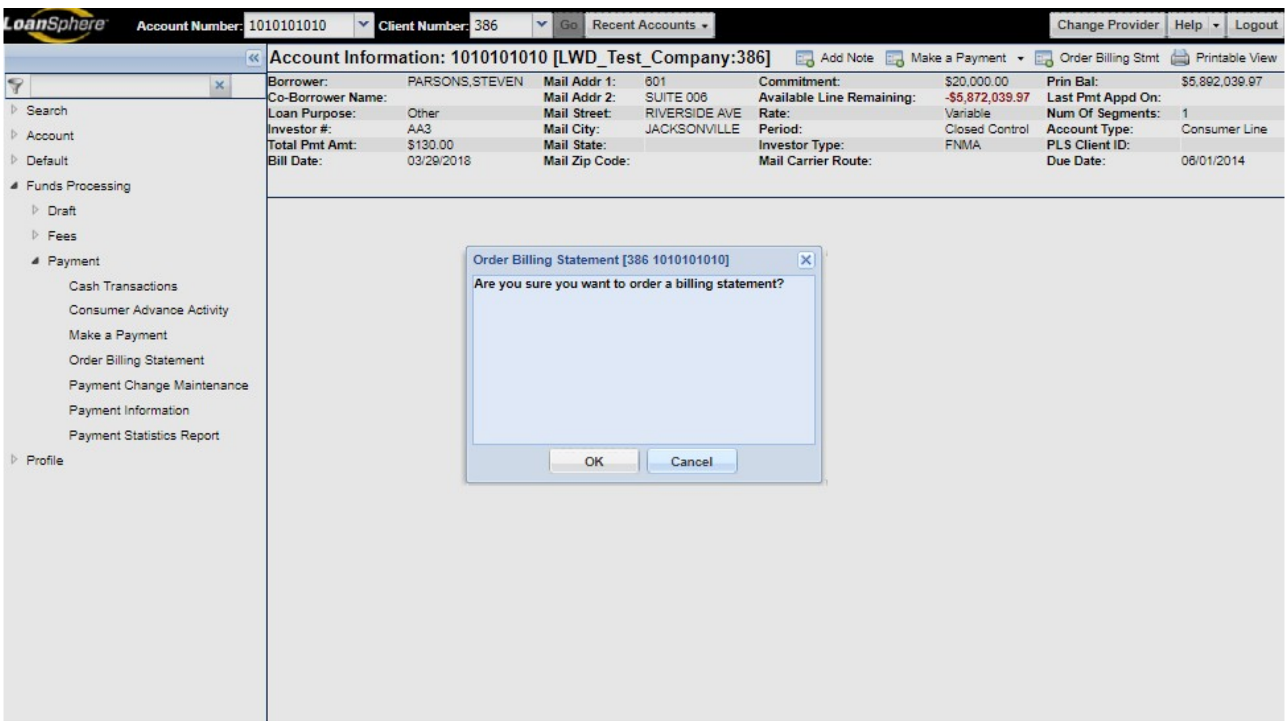
Order Billing Statement

The Order Billing Statement view enables you to order a billing statement for mortgage accounts. Consumer account billing statements are not available using this function; you must reprint them through Online LetterWriter.

1. Open the One Time Draft view by doing one of the following:
   - Click **Order Billing Stmt** on the toolbar.
   - Click **Order Billing Statement** in the navigation tree under Funds Processing >> Payment.
2. Click **OK**.

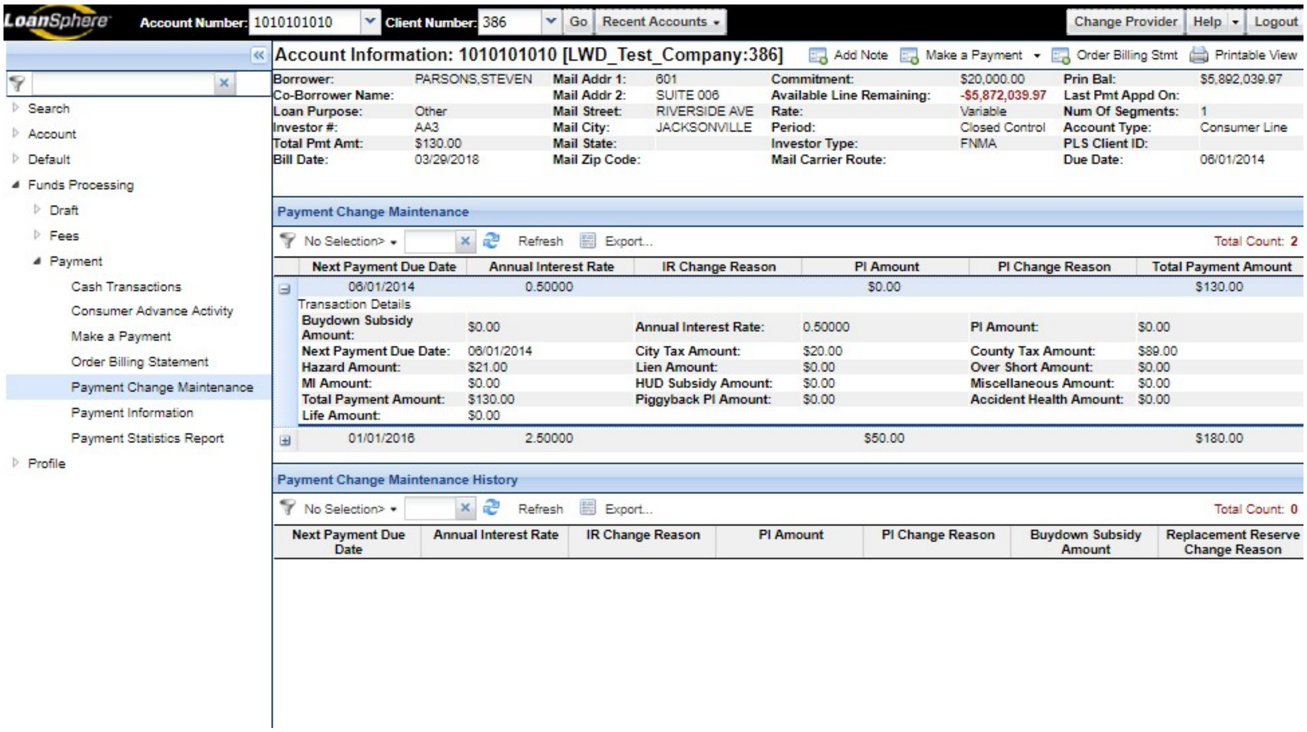
   A confirmation dialog box appears indicating that you successfully ordered the billing statement.
3. Click **OK**.

   The bill produces in the next cycle for billing statements.



Payment Change Maintenance

The Payment Change Maintenance view displays upcoming payment changes as well as a history of changes in principal, interest payment, and interest rate for selected loan types.



To filter only the information you want to view:

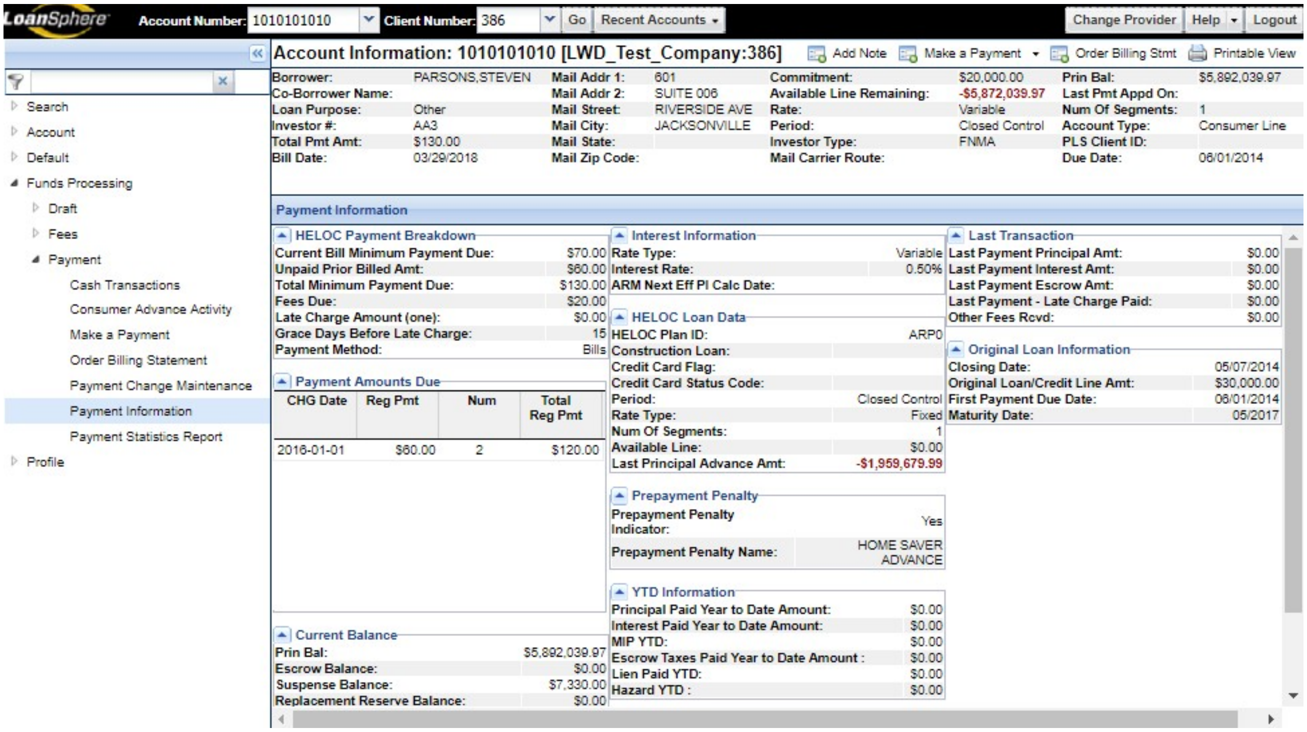
1. Click <none> and choose the field you want to filter.
2. Click Refresh and all other transactions are filtered out of the view.

Tips:

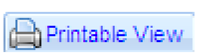
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.

Payment Information

The Payment Information view displays current payment information, special loan information, current and original balances, year-to-date paid information, prepayment, and last transaction applied information. The payment breakdown information for Consumer loans displays differently. See the second example.



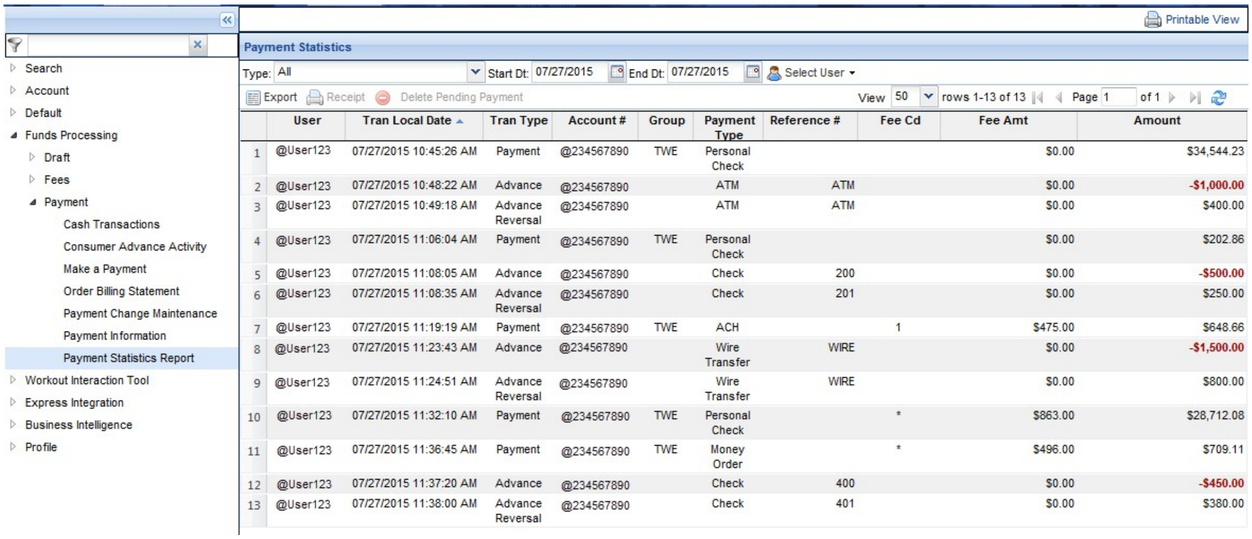
Tip:

- The 

feature enables you to print the view in its entirety in a user-friendly manner.

Payment Statistics Report

The Payment Statistics Report view enables you to view a summary of payments, advances, and reversals processed. You can also select a pending payment and mark it for deletion. Details include number applied by the user, the date, loan number, amount, group number, payment type, and reference type of each payment, and the total amount of payments applied. You can select to view payment activity for individual users or you can select multiple users from the **Select User** drop-down list.



	User	Tran Local Date	Tran Type	Account #	Group	Payment Type	Reference #	Fee Cd	Fee Amt	Amount
1	@User123	07/27/2015 10:45:26 AM	Payment	@234567890	TWE	Personal Check			$0.00	$34,544.23
2	@User123	07/27/2015 10:48:22 AM	Advance	@234567890		ATM	ATM		$0.00	-$1,000.00
3	@User123	07/27/2015 10:49:18 AM	Advance Reversal	@234567890		ATM	ATM		$0.00	$400.00
4	@User123	07/27/2015 11:06:04 AM	Payment	@234567890	TWE	Personal Check			$0.00	$202.86
5	@User123	07/27/2015 11:08:05 AM	Advance	@234567890		Check	200		$0.00	-$500.00
6	@User123	07/27/2015 11:08:35 AM	Advance Reversal	@234567890		Check	201		$0.00	$250.00
7	@User123	07/27/2015 11:19:19 AM	Payment	@234567890	TWE	ACH		1	$475.00	$648.66
8	@User123	07/27/2015 11:23:43 AM	Advance	@234567890		Wire Transfer	WIRE		$0.00	-$1,500.00
9	@User123	07/27/2015 11:24:51 AM	Advance Reversal	@234567890		Wire Transfer	WIRE		$0.00	$800.00
10	@User123	07/27/2015 11:32:10 AM	Payment	@234567890	TWE	Personal Check		*	$863.00	$28,712.08
11	@User123	07/27/2015 11:36:45 AM	Payment	@234567890	TWE	Money Order		*	$496.00	$709.11
12	@User123	07/27/2015 11:37:20 AM	Advance	@234567890		Check	400		$0.00	-$450.00
13	@User123	07/27/2015 11:38:00 AM	Advance Reversal	@234567890		Check	401		$0.00	$380.00

Tips:

- The Export button enables you to export the information from the grid to an Excel spreadsheet.
- The Printable View feature enables you to print the view in its entirety in a user-friendly manner.
- Click the right side of any column header to change the view's sort.
- To view additional information for each transaction, click the plus (+) sign to the left of the transaction.
- The Refresh button restores the default values.

Export Payment Statistics

1 Open the Payment Statistics view for a loan.

2 At the top of the Payment Statistics view, click **Export**.

3 Type a name for the export file and select the appropriate format.

The File Download dialog box appears.

4 Do the following:

- To preview the exported file, click **Open**.
- To save the exported file, click **Save**.