

ETRAC® — ENCOMPASS® INTEGRATION USER GUIDE



2019



nations
lending

APPRAISAL ORDERING INSTRUCTIONS:

Navigate to the Pipeline Screen:

The screenshot displays the Encompass360 Pipeline View interface. The window title is "Encompass360 - Build 14.2.0.0 - (Local) - admin - 3011134016". The main content area shows a table of loans with the following columns: Alerts, Mess, Loan Number, Borrower Name, Loan Amount, Loan Officer, Loan Processor, Current Loan Team Member, Last Finished Milest, Next Expected Milestone, Next Expecte, Subject Property Address, Subject Property City, and Subject Property St. The table contains 335 loans, with the first few rows highlighted in blue. The status bar at the bottom indicates "1246 | 08/11 13:52* | Thursday, 8/13/2015".

Alerts	Mess	Loan Number	Borrower Name	Loan Amount	Loan Officer	Loan Processor	Current Loan Team Member	Last Finished Milest	Next Expected Milestone	Next Expecte	Subject Property Address	Subject Property City	Subject Property St
		1506EM000318	Test4, Tony	200,000.00			Admin User	Started	Qualification	08/10/2015	126 Main Street	Lansdale	PA
		1506EM000319	Test6, Tony	200,000.00			Admin User	Started	Qualification	08/10/2015	127 Main Street	Lansdale	PA
		1506EM000313	Test051, Matt	211,635.00			Admin User	Started	Qualification	08/08/2015	123 E Main St	Lansdale	PA
		1506EM000321	Test052, Matt	188,120.00			Admin User	Started	Qualification	08/14/2015	123 E Main St	Lansdale	PA
		1506EM000314	Test052, Matt	188,120.00			Admin User	Started	Qualification	08/08/2015	123 E Main St	Lansdale	PA
		1506EM000320	Test011, Matt	229,500.00			Admin User	Started	Qualification	08/13/2015	1555 Bustard Rd	Lansdale	PA
		1506EM000309	Test04, Matt	229,500.00			Admin User	Started	Qualification	08/07/2015	1555 Bustard Rd	Lansdale	PA
		1506EM000315	Test051229, Matt	215,943.00			Admin User	Started	Qualification	08/08/2015	123 E Main St	Lansdale	PA
		1305EM000071	TestFullLastName, TestFulln	375,000.00	John Smith		John Smith	Started	Qualification		3121 Almaden Hwy #330	San Jose	CA
		1502EM000304	Testington, James	170,000.00			Admin User	Started	Qualification	03/01/2015	borrower	Lansdale	PA
		1409EM000269	TestRelease1, Encompass	102,000.00			Admin User	Started	Qualification	09/28/2014	123 borrowing st	Lansdale	PA
		1409EM000290	TestRelease2, Encompass	102,000.00			Admin User	Started	Qualification	09/28/2014	123 borrowing st	Lansdale	PA
		3333-555-7777	TestWey123, Test123				Admin User	Started	Qualification		1238 Hedding Street	San Jose	CA
		123-555-6666	Typeld, Product				Admin User	Started	Qualification		221 Any Street	Santa Clara	CA
		1305EM000073	VMG, Tracey				Admin User	Started	Qualification				
		1309EM000177	Walker, Jimmy	229,500.00			Admin User	Started	Qualification		1964 Hawthorne Ln	Hatfield	PA
		1408EM000262	Weatherford, Bond007	170,000.00			Admin User	Started	Qualification	08/31/2014	borrower	Lansdale	PA
		1405EM000265	Weatherford, Lisa	12,000.00			Admin User	Started	Qualification		borrower	Lansdale	PA
		LinWey222333	Wey, Lin1 C				Admin User	Started	Qualification		222 Anywhere Street	San Jose	CA
		2223335554	Wey, Linest C	345,000.00			Admin User	Started	Qualification		222 Any Street	San Jose	CA
		2223335555	WeyTest, LinTest	520,000.00			Admin User	Started	Qualification		222 Hedding Street	San Jose	CA
		1212EM000019	WeyTest, LinTest C				Admin User	Started	Qualification		222 Any Street	San Jose	CA
		3335551212	WeyTest1, LinTest1	589,920.00			Admin User	Started	Qualification		2323 Any Street	Campbell	CA
		1302EM000026	WeyTest1, LinTest1	600,000.00			Admin User	Started	Qualification		1700 Hedding Street	San Jose	CA
		2122-2222-WeyTest2	WeyTest2, LinTest				Admin User	Started	Qualification		2122 Any Street	Campbell	CA
		1310EM000220	Williams, Billy Dee	211,100.00			Admin User	Started	Qualification		26 E Broad St	Hatfield	PA
		1304EM000058	williams, borrower bill				Admin User	Started	Qualification		test street	Upper Gwynedd	PA
		1405EM000264	Willow II, Larabee	12,000.00			Admin User	Started	Qualification		Borrower	Lansdale	PA
		1408EM000263	Wilson, Bond28	170,000.00			Admin User	Started	Qualification	08/31/2014	borrower	Lansdale	PA
		1405EM000266	Wilson2, 000bond	12,000.00			Admin User	Started	Qualification		Borrower	Lansdale	PA
		1308EM000150	Wonka, Billy	233,750.00			Admin User	Started	Qualification		26 E Broad St	Hatfield	PA
		1309EM000161	Wonka, Charlie	209,015.00			Admin User	Started	Qualification		26 E Broad St	Hatfield	PA
		1308EM000151	Wonka, Wanda	208,250.00			Admin User	Started	Qualification		24 E Broad St	Hatfield	PA
		1308EM000145	Wonka, Villy	221,000.00			Admin User	Started	Qualification		26 E Broad St	Hatfield	PA
		1309EM000204	Wonka, Vilma W	233,750.00			Admin User	Started	Qualification		26 E Broad St	Hatfield	PA

Select the Loan File you wish to access

- In the lower left, select the "Services" tab and click "Order Appraisal"
(See screen shot on next page)

Alerts & Messages Log

<input type="checkbox"/> File Started	10/31/17
<input type="checkbox"/> Send to processing	
<input type="checkbox"/> Submittal	
<input type="checkbox"/> Cond. Approval	
<input type="checkbox"/> Resubmittal	
<input type="checkbox"/> Approval	
<input type="checkbox"/> Ready for Docs	
<input type="checkbox"/> Docs Out	
<input type="checkbox"/> Funding	
<input type="checkbox"/> Shipping	
<input type="checkbox"/> Purchasing	
<input type="checkbox"/> Completion	

Borrower Summary - Origination

Channel: [dropdown] Application Date: 10/31/2017
Current Status: Active Loan Date: //

Borrower Information No co-applicant Order Fraud

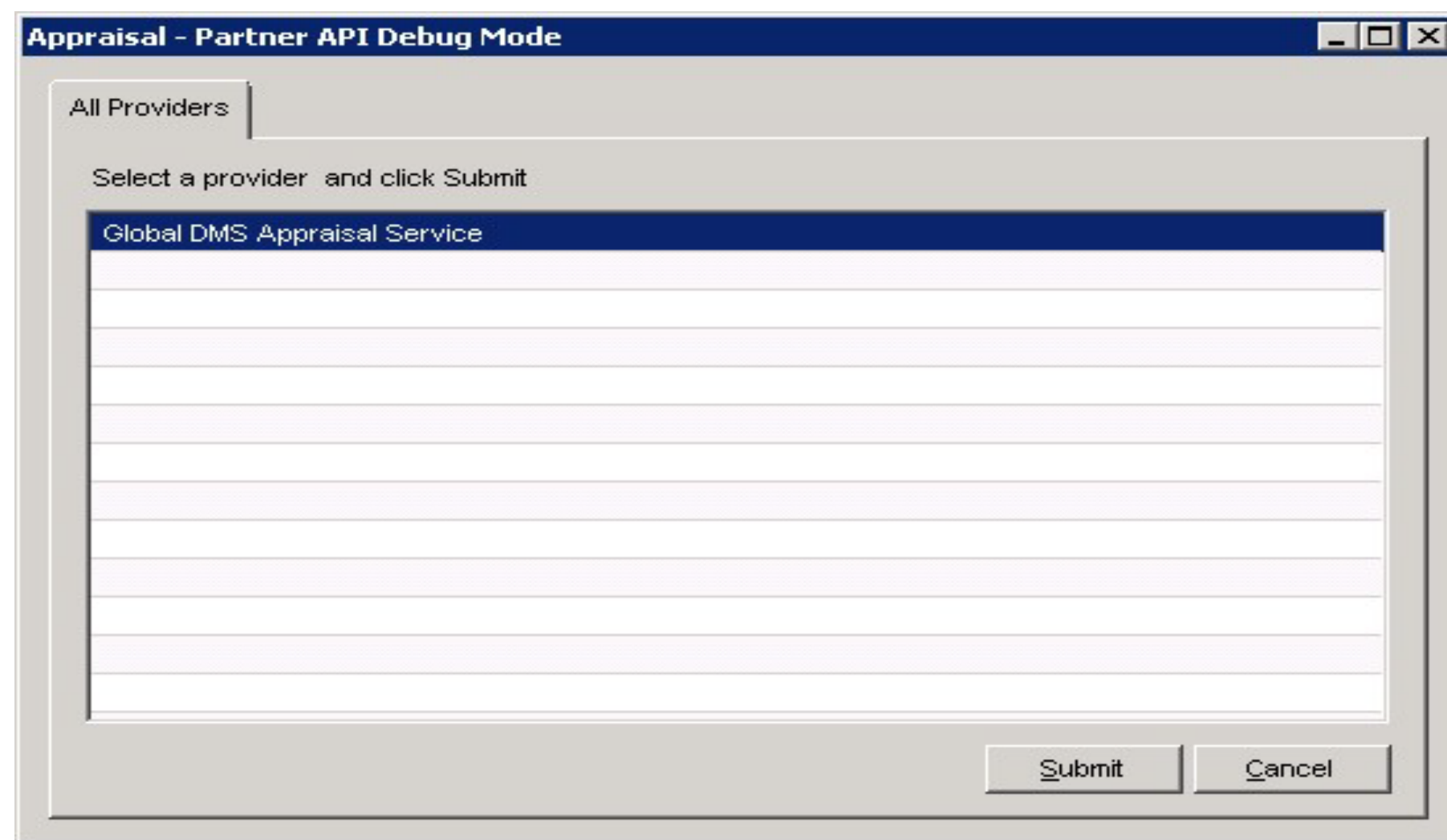
Borrower	Co-Borrower
Type: [dropdown]	Type: [dropdown]
First Name: Global	First Name: [input]
Middle: [input]	Middle: [input]
Last Name: DMS Suffix: [input]	Last Name: [input] Suffix: [input]
SSN: 123-45-6789	SSN: [input]
DOB: 02/17/1982	DOB: //
Home Phone: 877-693-8722	Home Phone: [input]
Work Phone: 877-693-8722	Work Phone: [input]
Cell: 877-693-8722	Cell: [input]
Marital Status: Unmarried	Marital Status: [dropdown]
Home E-mail: productinfo@globaldms.com	Home E-mail: [input]
Work E-mail: productinfo@globaldms.com	Work E-mail: [input]

Social Security Number Verification Order SSN Verification Check Status

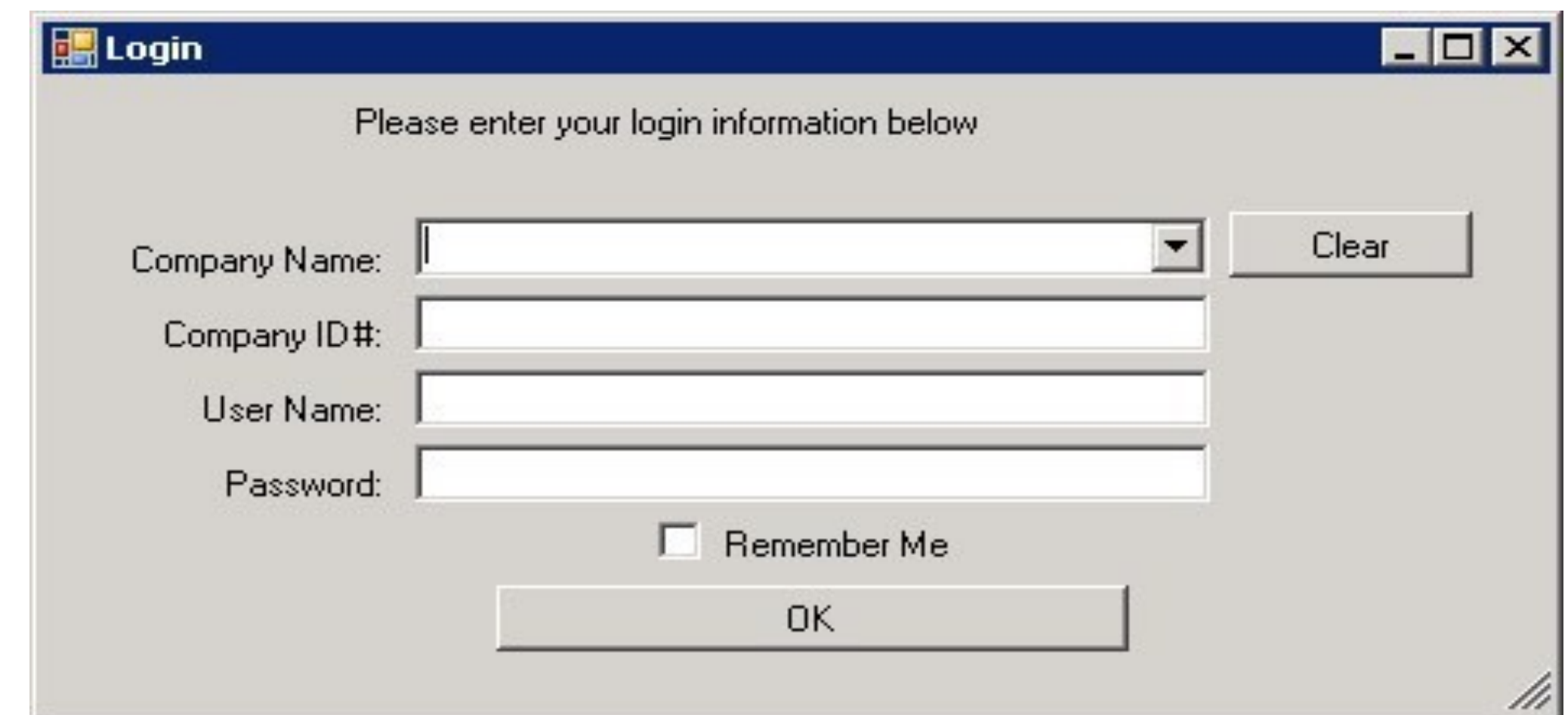
Borrower	Co-Borrower
The Purpose of the Transaction: Seeking a mortgage from the company	The Purpose of the Transaction: Seeking a mortgage from the company
This consent is valid for 60 days	This consent is valid for 60 days
<input type="checkbox"/> Mortgage Service <input type="checkbox"/> Banking Service	<input type="checkbox"/> Mortgage Service <input type="checkbox"/> Banking Service
<input type="checkbox"/> Background Check <input type="checkbox"/> License Requirement	<input type="checkbox"/> Background Check <input type="checkbox"/> License Requirement
<input type="checkbox"/> Credit Check <input type="checkbox"/> Other	<input type="checkbox"/> Credit Check <input type="checkbox"/> Other

- Forms Tools **Services**
- Order Credit Report
 - Access Lenders
 - Search Product and Pricing
 - Request Underwriting
 - Order Appraisal**
 - Order Flood Certification

- The API Provider selection screen will then appear
- Select the Global DMS Appraisal Service API



- Enter your login information on the Login screen.



- The "Property Contact Information" will populate from the "Seller's Agent" field

Global DMS Order Status - 3.4.6505.16867					
Loan Info		Loan Amount	Loan Type *	FHA	
Loan #	1710000991	Sales Price	Property Type *	Single Family Detached	
FHA Case #	123-4567890	Estimated Value	Intended Use *	Purchase	
Borrower Information <input type="checkbox"/> Is Contact		Property Contact Information		Property Information	
Name *	Global DMS	Name *	Global DMS	Address * 1555 Bustard Road	
CoBorr Name		Relation *	Seller's Agent		
Home	877-693-8722	Home	877-866-2747	City *	Lansdale State * PA
Cell	877-693-8722	Cell	877-866-2747	Zip *	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy PrimaryResidence	
Email *	productinfo@globaldms.com	Email *	productinfo@globald	Legal Desc	

- If the borrower is the contact, selecting the "Is Contact" checkbox will populate the borrower's information

Global DMS Order Status - 3.4.6505.16867					
Loan Info		Loan Amount	Loan Type *	FHA	
Loan #	1710000991	Sales Price	Property Type *	Single Family Detached	
FHA Case #	123-4567890	Estimated Value	Intended Use *	Purchase	
Borrower Information <input checked="" type="checkbox"/> Is Contact		Property Contact Information		Property Information	
Name *	Global DMS	Name *	Global DMS	Address * 1555 Bustard Road	
CoBorr Name		Relation *	Borrower		
Home	877-693-8722	Home	877-866-2747	City *	Lansdale State * PA
Cell	877-693-8722	Cell	877-866-2747	Zip *	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy PrimaryResidence	
Email *	productinfo@globaldms.com	Email *	productinfo@globald	Legal Desc	

Once the Order screen is populated, it's ready to be submitted

Global DMS Order Status - 3.4.6505.16867

Loan Info

Loan #	1710000991	Loan Amount		Loan Type *	FHA
FHA Case #	123-4567890	Sales Price		Property Type *	Single Family Detached
		Estimated Value		Intended Use *	Purchase

Borrower Information <input type="checkbox"/> Is Contact		Property Contact Information	Property Information
Name *	Global DMS	Name *	Global DMS
CoBorr Name		Relation *	Seller's Agent
Home	877-693-8722	Home	877-866-2747
Cell	877-693-8722	Cell	877-866-2747
Work	877-693-8722	Work	877-866-2747
Email *	productinfo@globaldms.com	Email *	productinfo@globald
		Address *	1555 Bustard Road
		City *	Lansdale
		State *	PA
		Zip *	19446
		County	Montgomery
		Occupancy	PrimaryResidence
		Legal Desc	

Appraisals

Messaging: --Select--

Report Type 1 *	1004 SFR URAR FHA	Date Needed	10/31/2017						
Report Type 2		Notes / Special Instructions							
Report Type 3		Notes and special instructions entered here.							
Report Type 4									
Report Type 5									
Processor 1	Encompass Processor 1	Attachments							
Processor 2	Encompass Processor 2	File Type							
Processor 3	Encompass Processor 3	<table border="1"> <thead> <tr> <th>File Name</th> <th>File Type</th> <th>Uploaded By</th> </tr> </thead> <tbody> <tr> <td>Purchase_Agreement.pdf</td> <td>Purchase Agreement</td> <td></td> </tr> </tbody> </table>		File Name	File Type	Uploaded By	Purchase_Agreement.pdf	Purchase Agreement	
File Name	File Type	Uploaded By							
Purchase_Agreement.pdf	Purchase Agreement								
Processor 4	Encompass Processor 4								
Payment Type *	Credit Card	Name on Card *	GlobalDMS						
Card Type *	Visa	Billing Address *	1555 Bustard Road						
Credit Card # *	4012888888881881	Billing City *	Lansdale						
Expiration *	January / 2019	Billing State *	PA						
		Billing Zip *	19446						

After your order is submitted, the "Report Types" and "Processors" that were selected on the Appraisal Order Form screen will be viewable on the "Appraisals" tab

Global DMS Order Status - 3.4.6505.16867

<u>Loan Info</u>		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

<u>Borrower Information</u>		<u>Property Contact Information</u>		<u>Property Information</u>		
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road	
CoBorr Name		Relation	Realtor			
Home	877-693-8722	Home	877-866-2747	City	Lansdale	State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446	County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence	
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc		

Appraisals | Additional Info

View Order New Order

Messaging:

Report Type	Processor	Payment Type
Report Type 1	1004 SFR URAR FHA	
Report Type 2		
Report Type 3		
Report Type 4		
Report Type 5		
Processor 1	Encompass Processor 1	<input checked="" type="checkbox"/>
Processor 2	Encompass Processor 2	<input checked="" type="checkbox"/>
Processor 3	Encompass Processor 3	<input checked="" type="checkbox"/>
Processor 4	Encompass Processor 4	<input checked="" type="checkbox"/>
Payment Type	Credit Card	

Date Needed: _____
Ordered By: Admin User
Est Completion: _____
Actual Completion: _____
Current Status Comments:

Attachments:

File Name	File Type	Uploaded By
Purchase_Agreement.pdf	Purchase Agreement	NMEncompa

Notes / Special Instructions: Notes and special instructions entered here.

- Emailing the office or vendor, as well as viewing the email log, can be done via the "Messaging" drop-down menu

Global DMS Order Status - 3.4.6505.16867

Loan Info		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

Borrower Information		Property Contact Information		Property Information		
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road	
CoBorr Name		Relation	Realtor			
Home	877-693-8722	Home	877-866-2747	City	Lansdale	State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446	County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence	
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc		

Appraisals | Additional Info

View Order New Order

Report Type 1	1004 SFR URAR FHA	Messaging	--Select--
Report Type 2		Date Needed	--Select--
Report Type 3		Ordered By:	Send Email
Report Type 4			Email Log
Report Type 5		Est Completion:	
		Actual Completion:	
		Current Status Comments:	

Status History

Send Email

Recipient: --Select--

Subject: --Select--
Office
Vendor

Body:

Send Now

Checking the status of your order can be done by clicking on the "Additional Info" tab

Global DMS Order Status - 3.4.6505.16867

<u>Loan Info</u>		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

<u>Borrower Information</u>		<u>Property Contact Information</u>		<u>Property Information</u>	
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road
CoBorr Name		Relation	Realtor		
Home	877-693-8722	Home	877-866-2747	City	Lansdale State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc	

Appraisals **Additional Info**

Order Date	File #	Status
10/31/2017	1145311	Scheduled

You can also check the status by clicking on the "Status History" button

Global DMS Order Status - 3.4.6505.16867

<u>Loan Info</u>		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

<u>Borrower Information</u>		<u>Property Contact Information</u>		<u>Property Information</u>	
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road
CoBorr Name		Relation	Realtor		
Home	877-693-8722	Home	877-866-2747	City	Lansdale State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc	

Appraisals | Additional Info

View Order New Order

Messaging: --Select--

Report Type 1: 1004 SFR URAR FHA

Date Needed: _____

Ordered By: Admin User

Est Completion: _____

Actual Completion: _____

Current Status Comments: **Status History**

This property has been inspected. Report to be delivered today.

Attachments: File Type: _____

StatusHistory

Close Status History

Date	Status	Message
10/31/2017 6:45:26 AM	Inspected	This property has been inspected. Report to be delivered today.
10/31/2017 6:44:59 AM	Scheduled	Inspection Scheduled on 10/31/2017 from 1:00 PM to 2:00 PM.
10/31/2017 6:44:35 AM	Accepted by Vendor	Appraiser Acceptance
10/31/2017 6:13:13 AM	Unassigned	File uploaded (via Web Service) by Client
10/31/2017 6:13:10 AM	Unassigned	Add Order - Web Services API by client user: NMEcompass5347.

Syncing the files back into the Encompass eFolder place card(s) is done by:

1. Click on the "Services" tab > "Order Appraisal" > select "Global DMS Appraisal Software"
2. Log in using your credentials
3. Click the "Get Order Info" button at the top left of the window and your files will move directly to the eFolder or to the appropriate place card in the Encompass eFolder

Global DMS Order Status - 3.4.6505.16867

Loan Info		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

Borrower Information		Property Contact Information		Property Information	
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road
CoBorr Name		Relation	Realtor		
Home	877-693-8722	Home	877-866-2747	City	Lansdale State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc	

Appraisals | **Additional Info**

View Order New Order Messaging: --Select--

Report Type 1: 1004 SFR URAR FHA Date Needed: Ordered By: Admin User

Report Type 2: Est Completion: Actual Completion: Current Status Comments: **Status History**

Processor 1: Encompass Processor 1 2 Files Uploaded by appraiser

Processor 2: Encompass Processor 2

Processor 3: Encompass Processor 3

Processor 4: Encompass Processor 4

Payment Type: Credit Card

Notes / Special Instructions: Notes and special instructions entered here.

Attachments File Type:

File Name	File Type
Purchase_Agreement20171031091313.pdf	Pu
xNick_Demo_Engagement_Letter20171031094351.pdf	Ve
AppraisalReport20171031103432.pdf	Ap
Freddie Mac SSR20171031103616.pdf	FR

Get Order Info Save Close

Encompass eFolder

eFolder Documents Help

Documents Preliminary Conditions Underwriting Conditions Post-Closing Conditions History

Documents View Standard View

Document Group (All Documents) Stacking Order None

Documents (24)

Att	Fo	Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date
		1003 - URLA		Global DMS	Standard Form	AC, CL, FN, LD,...			
		Credit Authorization		Global DMS	Standard Form	AC, CL, FN, LD,...			
		Equal Credit Opportunity Act		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FACT Act Disclosure		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA Amendatory Clause		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA Blanket Signature Authorization		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA Counseling Certification		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA Identity of Interest Certificate		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA Informed Consumer Choice Disclosure		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA SSN Certification Borrower		Global DMS	Standard Form	AC, CL, FN, LD,...			
		FHA SSN Certification Co-Borrower		Global DMS	Standard Form	AC, CL, FN, LD,...			
		GlobalDMS_AppraisalReport20171031103432.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		GlobalDMS_EAD SSR20171031103616.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		GlobalDMS_Fannie Mae SSR20171031103616.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		GlobalDMS_Freddie Mac SSR20171031103616.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		GlobalDMS_Purchase_Agreement.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		GlobalDMS_Purchase_Agreement20171031091313.pdf		Global DMS	Settlement Service	AC, CL, FN, LD,...	Processing	Received	10/31/17
		Good Faith Estimate		Global DMS	Standard Form	AC, CL, FN, LD,...			
		HUD Settlement Cost Booklet		Global DMS	Standard Form	AC, CL, FN, LD,...			
		HUD-92900-A Addendum		Global DMS	Standard Form	AC, CL, FN, LD,...			
		IRS 4506 - Request for Copy of Tax Return		Global DMS	Standard Form	AC, CL, FN, LD,...			
		IRS 4506T - Request for Transcript of Tax Return		Global DMS	Standard Form	AC, CL, FN, LD,...			
		Reg-Z Initial Disclosure		Global DMS	Standard Form	AC, CL, FN, LD,...			
		RESPA Servicing Disclosure		Global DMS	Standard Form	AC, CL, FN, LD,...			

Ordering a Second Appraisal/Final Inspection is done by:

- Selecting the "New Order" option
- Select from the "Report Type 1" drop-down menu
- Select the payment type from the "Payment Type" drop-down menu
- Click the "Save" button

Global DMS Order Status - 3.4.6505.16867

Loan Info		Loan Amount	Loan Type	FHA
Loan #	1710000991	Sales Price	Property Type	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use:	Purchase

Borrower Information		Property Contact Information		Property Information	
Name	Global DMS	Name	Global DMS	Address	1555 Bustard Road
CoBorr Name		Relation	Realtor		
Home	877-693-8722	Home	877-866-2747	City	Lansdale State PA
Cell	877-693-8722	Cell	877-866-2747	Zip	19446 County Montgomery
Work	877-693-8722	Work	877-866-2747	Occupancy	Primary Residence
Email	productinfo@globaldms.com	Email	productinfo@globaldms.c...	Legal Desc	

Appraisals | Additional Info

View Order **New Order** Messaging

Report Type 1 1004 SFR URAR FHA Date Needed
Report Type 2 Ordered By: Admin User
Report Type 3 Est Completion:
Report Type 4 Actual Completion: 11/1/2017
Report Type 5 Current Status Comments: [Status History](#)

Processor 1 Encompass Processor 1
Processor 2 Encompass Processor 2
Processor 3 Encompass Processor 3
Processor 4 Encompass Processor 4

Payment Type Credit Card

Notes / Special Instructions
Notes and special instructions entered here.

Attachments File Type

File Name	File Type
Purchase_Agreement20171031091313.pdf	Pu
xNick_Demo_Engagement_Letter20171031094351.pdf	Ver
AppraisalReport20171031103432.pdf	Ap
Freddie Mac SSR20171031103616.pdf	FR

Global DMS Order Status - 3.4.6505.16867

Loan Info		Loan Amount	Loan Type *	FHA
Loan #	1710000991	Sales Price	Property Type *	Single Family Detached
FHA Case #	123-4567890	Estimated Value	Intended Use *	Purchase

Borrower Information <input type="checkbox"/> Is Contact		Property Contact Information		Property Information	
Name *	Global DMS	Name *	Global DMS	Address * 1555 Bustard Road	
CoBorr Name		Relation *	Realtor	City * Lansdale State * PA	
Home	877-693-8722	Home	877-866-2747	Zip * 19446 County Montgomery	
Cell	877-693-8722	Cell	877-866-2747	Occupancy Primary Residence	
Work	877-693-8722	Work	877-866-2747	Legal Desc	
Email *	productinfo@globaldms.com	Email *	productinfo@globald		

Appraisals | Additional Info

View Order New Order

Messaging: --Select--

Report Type 1 * 1004D - Final Inspection

Date Needed: 11/ 1/2018 Pre-Scheduling Scheduled

Notes / Special Instructions: Notes and special instructions entered here.

Attachments:

File Name	File Type
Purchase_Agreement20171031091313.pdf	Pu
Nick_Demo_Engagement_Letter20171031094351.pdf	Ver

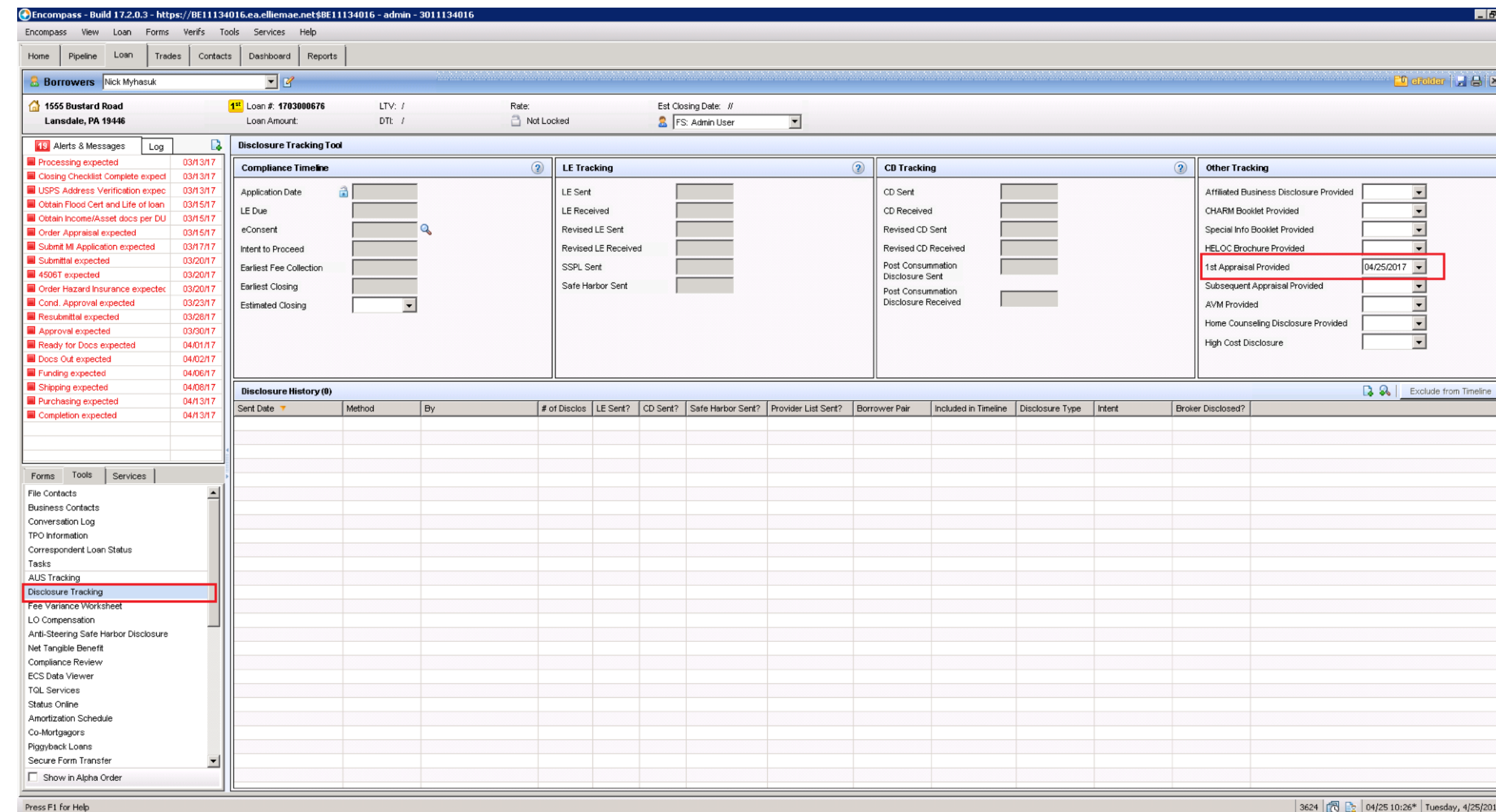
Processor 1: Encompass Processor 1
 Processor 2: Encompass Processor 2
 Processor 3: Encompass Processor 3
 Processor 4: Encompass Processor 4

Payment Type: Credit Card
 Card Type: Visa
 Credit Card #: 4012888888881881
 Expiration: January / 2018

Name on Card: GlobalDMS
 Billing Address: 1555 Bustard Road
 Billing City: Lansdale
 Billing State: PA
 Billing Zip: 19446

Get Order Info | **Save** | Close

The "1st Appraisal Provided" date will be filled in under the "Disclosure Tracking" tool

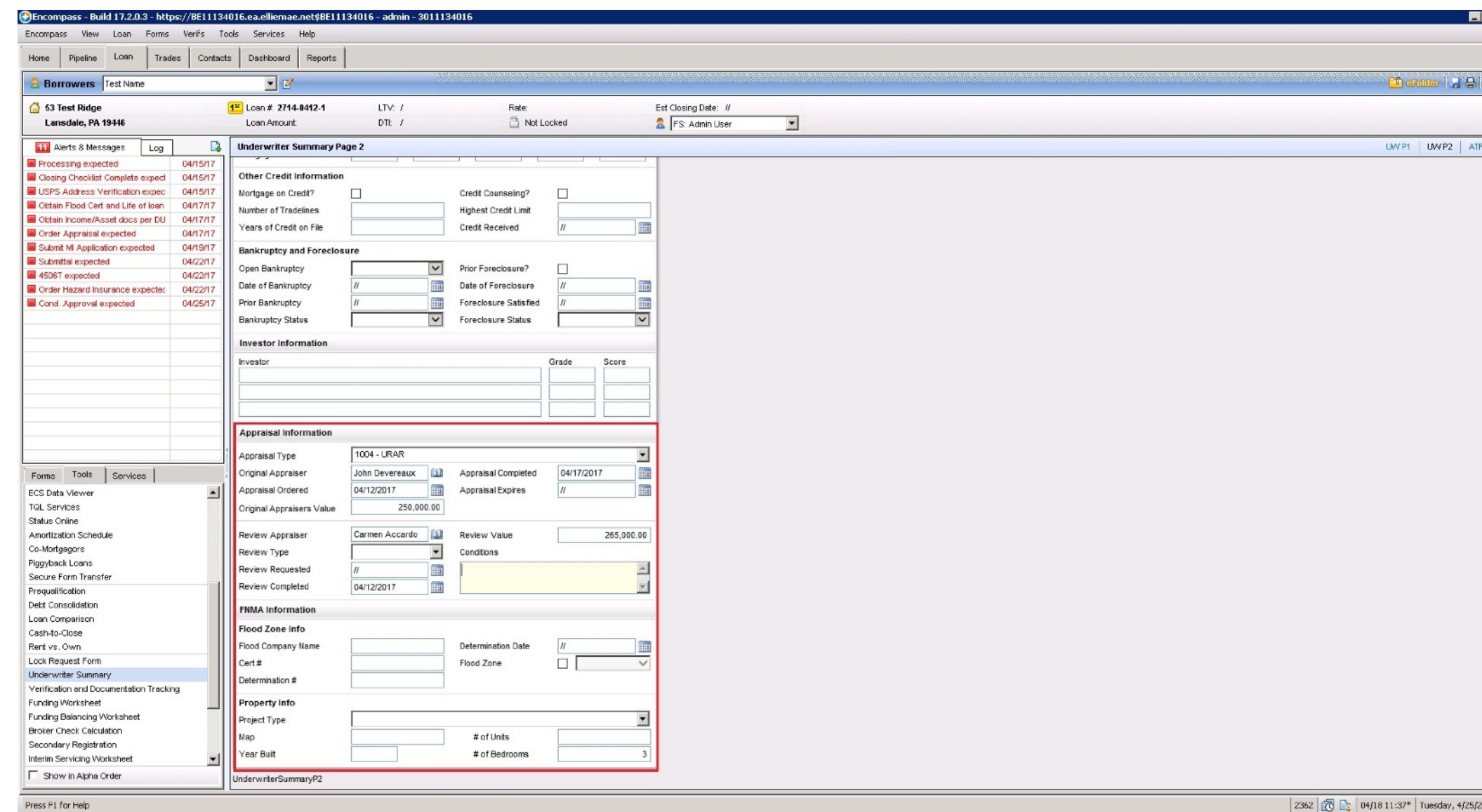


The "Appraisal Information", located under "Underwriter Summary" will be automatically filled in.

This includes:

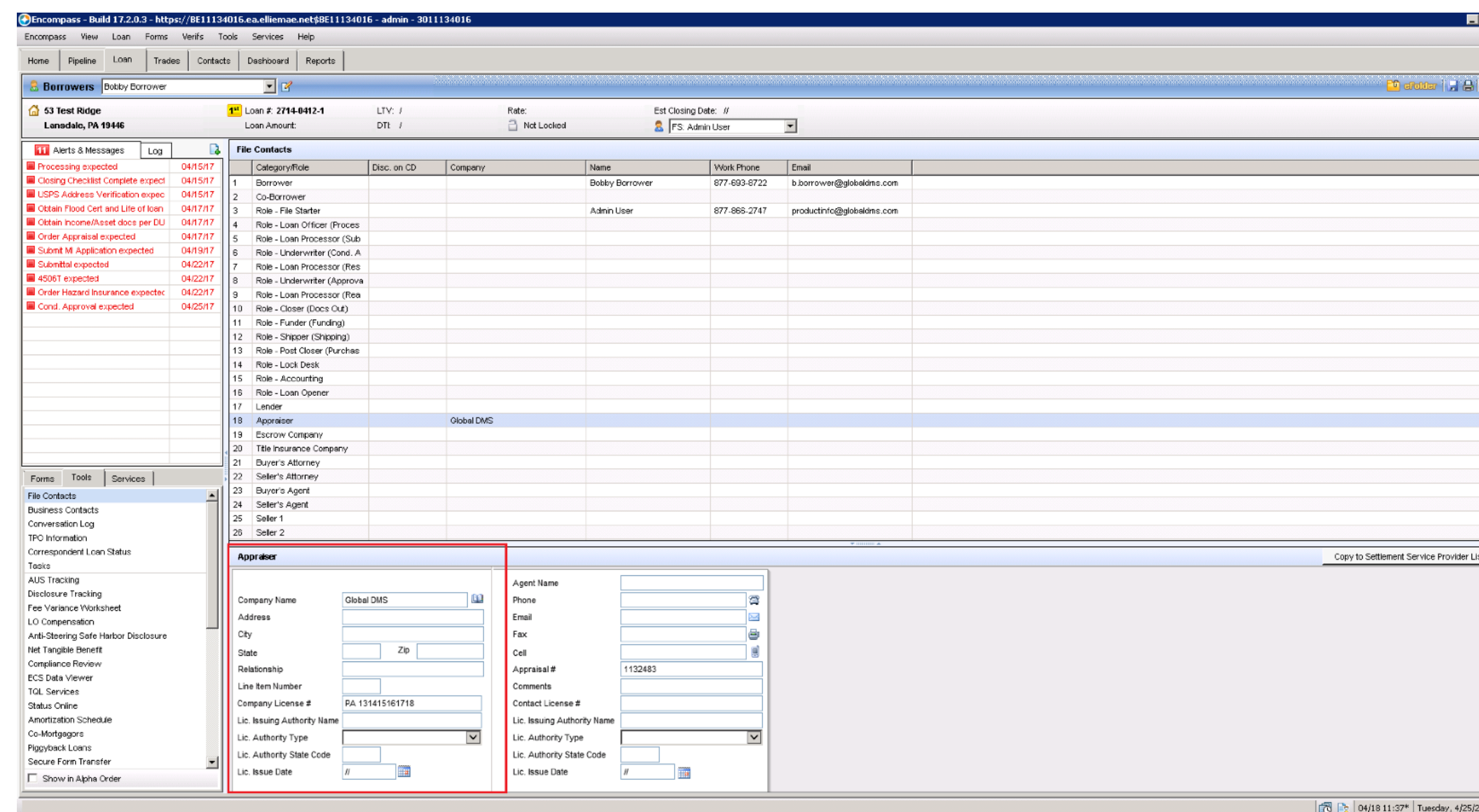
- Appraisal Type
- Original Appraisal
- Appraisal Ordered
- Original Appraisers Value
- Appraisal Completed
- # of Bedrooms

(See screen shot on next page)



The **Appraiser** information under **File Contacts** will be automatically filled in. This includes:

- Company Name (Appraiser Name)
- Company License #



Pre-Scheduler Tool & Encompass® Integration:

eTrac's Pre-Scheduler app is also available within the platform's Encompass integration. Those that utilize this integration can access the app directly from their native Encompass interface to select between 1 to 3 property appraisal appointment dates per order that an appraisal is to be completed by. Once the dates have been selected, the information is immediately sent to eTrac. The system then automatically searches for applicable appraisers that could complete the order. The order, including the specified dates, is then instantly broadcast to these appraisers for optimal assignment. If an appraiser wishes to accept the order, they must first select and agree to one of the required appraisal appointment dates.

How to Use Pre-Scheduler with Encompass:

- Verify that the Pre-Scheduler app is enabled within your eTrac system
- Open the Encompass application
- Create a new order
- Select "Order Appraisal"
- Locate the "Pre-Scheduling" button (directly below the "Messaging" drop-down menu)

The screenshot displays the 'Global DMS Order Status - 3.4.6828.28048' window. It is divided into several sections: 'Loan Info', 'Borrower Information', 'Property Contact Information', and 'Property Information'. The 'Loan Info' section includes fields for Loan # (1811001166), Sales Price, Estimated Value, Loan Type (Conventional), Property Type (Single Family Detached), and Intended Use. The 'Borrower Information' section shows Name (Marge Simpson), CoBorr Name, Home, Cell, Work, and Email (marge@email.com) details. The 'Property Contact Information' section shows Name (Marge Simpson), Relation (Borrower), Home, Cell, Work, and Email (marge@email.com) details. The 'Property Information' section shows Address (1313 Mockingbird Lane), City (Lansdale), State (PA), Zip (19446), County (Montgomery), and Occupancy. Below these sections is the 'Appraisals' section, which includes a 'Messaging' drop-down menu set to '--Select--'. Below the 'Messaging' menu, there are radio buttons for 'Pre-Scheduling' (which is selected and highlighted with a red box) and 'Scheduled'. The 'Date Needed' is set to 11/1/2018. There are also fields for 'Report Type 1' through 'Report Type 5', 'Processor 1' through 'Processor 4', and 'Payment Type' (set to Bill). At the bottom, there are buttons for 'Get Order Info', 'Save', and 'Close'.

Click on the "Pre-Scheduling" button (a "Pre-Scheduled Dates" window will then open)

The screenshot shows a window titled "Pre-Scheduled Dates" with a close button (X) in the top right corner. It contains three rows, each labeled "Option 1", "Option 2", and "Option 3". Each row has a text input field, a calendar icon, a "Start Time" dropdown menu, an "End Time" dropdown menu, and a "Clear" button. At the bottom of the window are "Save" and "Cancel" buttons.

selecting a date in the "Option 1" row via the calendar tool

The screenshot shows the "Pre-Scheduled Dates" window with a calendar for November 2018 overlaid on the "Option 1" row. The calendar shows the days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and the dates. The date 11/1/2018 is highlighted. The "Option 1" text input field is highlighted with a red box. The "Start Time" dropdown menu is also visible.

Select the "Start Time" via its drop-down menu

The screenshot shows the "Pre-Scheduled Dates" window with the "Start Time" dropdown menu open for the "Option 1" row. The date "11/27/2018" is entered in the "Option 1" text input field. The dropdown menu lists times from 06:00 AM to 08:00 AM in 15-minute increments. The "Start Time" dropdown menu is highlighted with a red box.

Select the "End Time" the same way via its drop-down menu

- "Option 2" will then become available – follow the same steps
- "Option 3" will then become available – follow the same steps
- If necessary, users can clear these fields by clicking the adjacent "Clear" button

NOTE: "Option 2" and "Option 3" will not become available until the proceeding option has been completed.

- Click on the "Save" button to save your pre-scheduled dates and times to the order
- To cancel, click the "Cancel" button – this will close the application without saving any entries

When one or more dates have been saved to the order, the "Scheduled" checkbox will then be checked:

The screenshot displays the 'Global DMS Order Status - 3.4.6828.28048' application window. The 'Appraisals' section is active, showing a list of report types and processors. The 'Date Needed' is set to 11/1/2018. The 'Pre-Scheduling' checkbox is unchecked, while the 'Scheduled' checkbox is checked and highlighted with a red box. The 'Payment Type' is set to 'Bill'. At the bottom, there are buttons for 'Get Order Info', 'Save', and 'Close'.

Loan Info		
Loan #	1811001166	Loan Amount
FHA Case #		Estimated Value
Loan Type *	Conventional	Property Type *
		Single Family Detached
		Intended Use *

Borrower Information <input checked="" type="checkbox"/> Is Contact		Property Contact Information		Property Information	
Name *	Marge Simpson	Name *	Marge Simpson	Address *	
CoBorr Name		Relation *	Borrower	1313 Mockingbird Lane	
Home	215-554-1122	Home	215-554-1122	City *	Lansdale
Cell	215-555-1236	Cell	215-555-1236	State *	PA
Work	215-555-5555	Work	215-555-5555	Zip *	19446
Email *	marge@email.com	Email *	marge@email.com	County	Montgomery
				Occupancy	
				Legal Desc	

Appraisals	
Report Type 1 *	Regression 9.0 Product
Report Type 2	
Report Type 3	
Report Type 4	
Report Type 5	
Processor 1	
Processor 2	
Processor 3	
Processor 4	
Payment Type *	Bill

In order to view or change the pre-scheduled dates BEFORE submitting the order, the user must click on the "Pre-Scheduling" button.

After submitting the order, the user will still be able to view the pre-scheduled dates and times, but these cannot be changed:

The screenshot displays the 'Global DMS Order Status - 3.4.6828.28048' window. It is divided into several sections:

- Loan Info:** Loan # 1811001166, Loan Amount, Sales Price, Loan Type Conventional, Property Type Single Family Detached, FHA Case #, Estimated Value, Intended Use: Purchase.
- Borrower Information:** Name Marge Simpson, CoBorr Name, Home 215-554-1122, Cell 215-555-1236, Work 215-555-5555, Email marge@email.com.
- Property Contact Information:** Name Marge Simpson, Relation Borrower, Home 215-554-1122, Cell 215-555-1236, Work 215-555-5555, Email marge@email.com.
- Property Information:** Address 1313 Mockingbird Lane, City Lansdale, State PA, Zip 19446, County Montgomery, Occupancy, Legal Desc.

Below the information sections, there are tabs for 'Appraisals' and 'Additional Info'. The 'Additional Info' tab is active, showing:

- Buttons: View Order (selected), New Order.
- Messaging: --Select--
- Report Type 1: Regression 9.0 Product
- Date Needed: 11/1/2018
- Ordered By: Admin User
- Est Completion:
- Actual Completion:
- Current Status Comments: [Empty text area]
- Attachments: File Type [Dropdown]
- Notes / Special Instructions: Testing Client Instructions 9.1 Staging

The 'Pre-Scheduled Inspection Dates' section is highlighted with a red box and contains the following data:

Pre-Scheduled Inspection Dates
1: 11/27/2018 10:15 AM to 12:00 PM
2: 11/28/2018 12:45 PM to 3:15 PM
3: 11/29/2018 8:45 AM to 10:30 AM

At the bottom of the window, there are buttons for 'Get Order Info', 'Save', and 'Close'.

Activating eTrac Pre-Scheduler:

To begin utilizing eTrac's Pre-Scheduler tool, please contact our Technical Support Department to have the app enabled within your system.

Please do not hesitate to contact eTrac Support for more information or if you need additional help.

Call 877-866-2747 and select option 3

email: help@myetrac.com