

RIMS University Adding Services to an Existing Requests and Cloning

January, 2019



Adding Services – Tiers and Cloning

There are a series of settings that control what is presented to the user when additional services are being added to an existing Service Request. Today we are going to provide a general overview and the expected behavior for each.

Tier One – The period of time immediately after the Service Request has been sent

For a defined period of time immediately after the Service Request is sent, the Service Request will be locked. New services and properties can be added, but the details within the Service Request cannot be edited by the Account Officer.

Tier Two – once the age of the Service Request passes the first Tier, there will be another defined period of time called “Tier Two”

Tier two will recognize that at this stage, some critical information in the Service Request may have changed and require updates. This stage will not only unlock those fields, but will clear out the data and require fresh data to be entered before the request can be sent.

Tier Three/Cloning – this final stage occurs either when the age of the Service Request is so old that a brand new Request is needed or the calendar year changes.

At this stage in the process, the information within the Service Request is “Cloned” and a new Draft Request is automatically created. This new Service Request will create a new Project in RIMS that is automatically linked as a Related Project to the original one.



Tier One – Adding a Service to a recently sent Service Request

When adding a service to a relatively new request, that still remains in the Tier One status, the user is not restricted from adding a service and they will not receive any pop up warnings. They will simply click on the **Add Services** link in the Request

Service Request Form - Services
Use these pages to manage Service Requests, including transaction information, properties, and services

Project #: 18-000105	Borrower: Test Borrower
Project: Test Valuation	Loan #: 123456

[Service Request](#) | [Services](#) | [View Printable](#)

For each Incomplete Service below, please fill in any missing fields, confirm any default values that may be filled in for you, then click 'Save Details'.

Select checkboxes for services you are ready to send now.

100 Sunnyside Ave, Watertown, CT 06779 [View Property](#)

Appraisal (Order)	[Delivery: 12/26/2018]	Sent 12/05/2018 <input type="checkbox"/>
Appraisal Review	[Delivery: 12/26/2018]	Sent 12/05/2018 <input type="checkbox"/>
Add Services		
Attach Property Documents		

[Save Details for All](#) [Send Selected Services](#) [Add Service\(s\) to all Properties](#) [Attach Property Documents](#)

To add services to an additional Property, click the 'Add Services to New Property' button

[Add Services to New Property](#)

Tier One – Adding a Service to a recently sent Service Request

They will then choose the new service from the Menu and click “**Next**”.

Service Request Form - Services
Use these pages to manage Service Requests, including transaction information, properties, and services

Project #: 18-000105 Borrower: Test Borrower
Project: Test Valuation Loan #: 123456

100 Sunnyside Ave, Watertown, CT 06779 View Property

- Appraisal (Order) [Delivery: 12/26/2018]
- Appraisal Review [Delivery: 12/26/2018]

[Add Services](#)
[Attach Property Documents](#)

[Save Details for All](#) [Send Selected Services](#) [Add Service\(s\) to all Properties](#) [Attach](#)

To add services to an additional Property, click the 'Add Services to New Property' button

[Add Services to New Property](#)

Select one or more services to add to your request, then click 'Next' to continue.
NOTE: If the property or properties already have the selected services, they will not be added.

Appraisal Services

- ☒ Appraisal (Order)
- ☐ Appraisal Review
- ☐ Evaluation
- ☐ Inspect Property (not part of App)
- ☐ New Appraisal Reg Z
- ☐ Demo
- ☐ Short form Service
- ☐ Short form Request for Review
- ☐ 3 Linked Tasks
- ☐ Short Form
- ☐ NEW FULL AUTO SERVICE
- ☐ TEST Fee Schedule - COMP
- ☐ TEST Fee Schedule - TECHNICAL
- ☐ Existing Residential Report Review

Order appraisal for Reg Z
demo semi automated award
Short form for testing
Short form Request to Review existing report
3 Linked Tasks
Test Short Form
TEST
Request a review of an existing residential report from another bank

Environmental Services

- ☐ Phase I ESA (Order)
- ☐ Phase II ESA (Order)
- ☐ Phase I ESA Review
- ☐ Phase II ESA Review
- ☐ Env. Questionnaire (Review)
- ☐ Regulatory Database Search (Order)
- ☐ Regulatory Database Search (Review)
- ☐ Transaction Screen (Order)
- ☐ Transaction Screen (Review)

Review of provided report
Review of a provided report

[Next](#) [Cancel](#)

Service Request | Services | View Printab
Select checkboxes for services you are ready to send now
Sent 12/05/2018
Sent 12/05/2018

Tier One – Adding a Service to a recently sent Service Request

The new service will be added to the Request and the user will be able to “**Send the Selected Services**” from there.

1 request has not been sent and there is 1 service that needs data input confirmed.
For each incomplete Service below, please fill in any missing fields, confirm any default values that may be filled in for you, then click 'Save Details'.

Select checkboxes for services you are ready to send now.

100 Sunnyside Ave, Watertown, CT 06779 [View Property](#)

Appraisal (Order) [Delivery: 12/26/2018] Sent 12/05/2018

Appraisal Review [Delivery: 12/26/2018] Sent 12/05/2018

Appraisal (Order) Unsent ☒

Desired Delivery Date: 12/26/2018

GL Account: 123Sample - Expense to be reimbursed by borrower

Was a good faith deposit collected? No

Is/Was any of the third party expense not reimbursed (waived)? No

Requires Pre-Engagement Authorization? No

Comments: Please select the fastest bid.

Is this a Watchlist Property? No

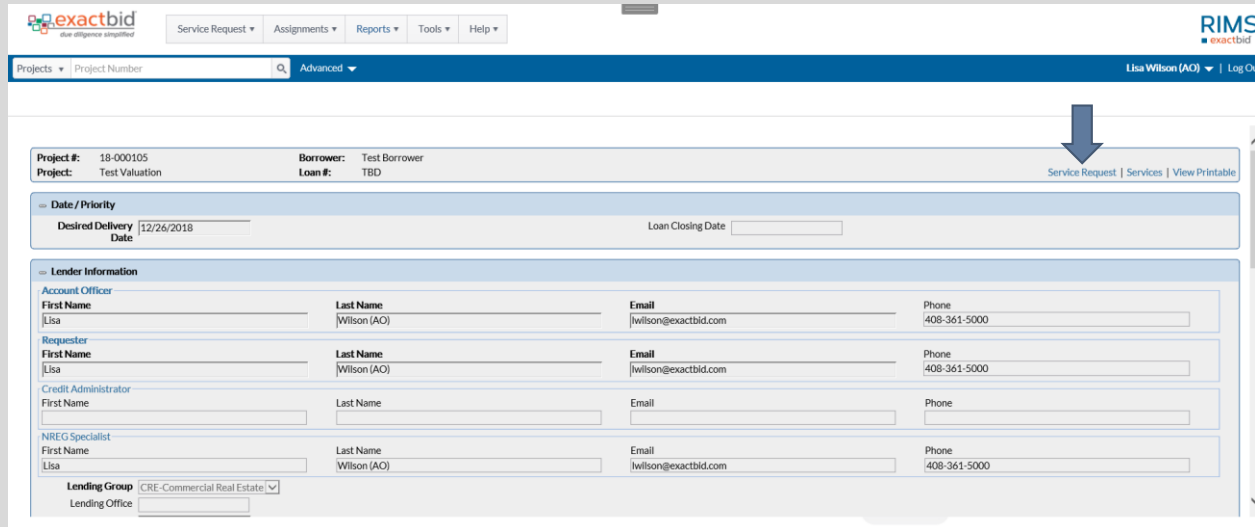
[Save Details](#) DATA SAVED. [Remove Service](#)

[Add Services](#)
[Attach Property Documents](#)

[Save Details for All](#) [Send Selected Services](#) [Add Service\(s\) to all Properties](#) [Attach Property Documents](#)

Tier One – Adding a Service to a recently sent Service Request

They will be restricted from making any changes to other portions of the service request. They will find that the fields are greyed out and locked for editing. This is by design to prevent changes from being made without the Job Manager's knowledge while the bidding and awarding process is in progress.



The screenshot shows the 'exactbid' RIMS interface for a 'Service Request'. The top navigation bar includes 'Service Request', 'Assignments', 'Reports', 'Tools', and 'Help'. The user 'Lisa Wilson (AO)' is logged in. The form displays project details: Project # 18-000105, Project Test Valuation, Borrower Test Borrower, and Loan # TBD. A blue arrow points to the 'Service Request' link in the top right corner of the form header. Below this, the 'Date / Priority' section shows 'Desired Delivery Date' as 12/26/2018 and 'Loan Closing Date' as an empty field. The 'Lender Information' section contains four rows of contact information, all of which are greyed out and locked for editing. The first row is for the 'Account Officer' (Lisa Wilson), the second for the 'Requester' (Lisa Wilson), the third for the 'Credit Administrator' (First Name, Last Name, Email, Phone), and the fourth for the 'NREG Specialist' (First Name, Last Name, Email, Phone). The 'Lending Group' is set to 'CRE-Commercial Real Estate' and the 'Lending Office' is an empty field.

Project Information		Borrower Information	
Project #:	18-000105	Borrower:	Test Borrower
Project:	Test Valuation	Loan #:	TBD

[Service Request](#) | [Services](#) | [View Printable](#)

Date / Priority

Desired Delivery Date: 12/26/2018 Loan Closing Date:

Lender Information

Account Officer			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-5000

Requester			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-5000

Credit Administrator			
First Name	Last Name	Email	Phone
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

NREG Specialist			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-5000

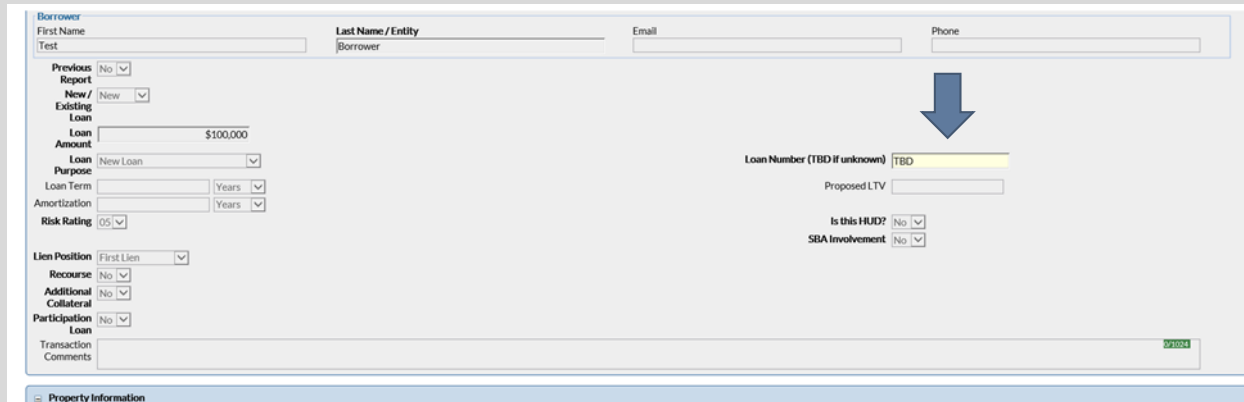
Lending Group CRE-Commercial Real Estate

Lending Office

Tier One – Adding a Service to a recently sent Service Request

While in Tier One - It is possible to leave specific fields open for editing and in that case you may see one or more fields that are not Grey or Green, but are open for editing. This must be set up on a field by field basis by RIMS Support.

Allowing a field to remain open for edits would allow the Account Officer to navigate to that page of the Service Request, update that field and save changes even without sending additional services on the project.



The screenshot shows a web form for adding a service to a recently sent service request. The form is divided into several sections. On the left, there is a 'Borrower' section with fields for 'First Name' (containing 'Test'), 'Last Name / Entity' (containing 'Borrower'), 'Email', and 'Phone'. Below this is a 'Previous Report' section with 'New / Existing' (set to 'New') and 'Loan Amount' (set to '\$100,000'). The 'Loan Purpose' section includes 'Loan Term' (set to 'Years'), 'Amortization' (set to 'Years'), and 'Risk Rating' (set to '05'). The 'Lien Position' section has 'First Lien' selected. The 'Recourse' section has 'No' selected. The 'Additional Collateral' section has 'No' selected. The 'Participation Loan' section has 'No' selected. The 'Transaction Comments' field is at the bottom left. On the right, there is a 'Loan Number (TBD if unknown)' field with 'TBD' entered, highlighted in yellow. A blue arrow points down to this field. Below it is a 'Proposed LTV' field. Further down are 'Is this HUD?' and 'SBA Involvement' fields, both with 'No' selected. At the bottom right, there is a green 'Save' button.

Borrower		Last Name / Entity		Email	Phone
First Name	Test	Borrower			

Previous Report: New / Existing (New), Loan Amount: \$100,000

Loan Purpose: Loan Term (Years), Amortization (Years), Risk Rating (05)

Lien Position: First Lien

Recourse: No

Additional Collateral: No

Participation Loan: No

Transaction Comments

Loan Number (TBD if unknown): TBD

Proposed LTV

Is this HUD? No

SBA Involvement: No

Save

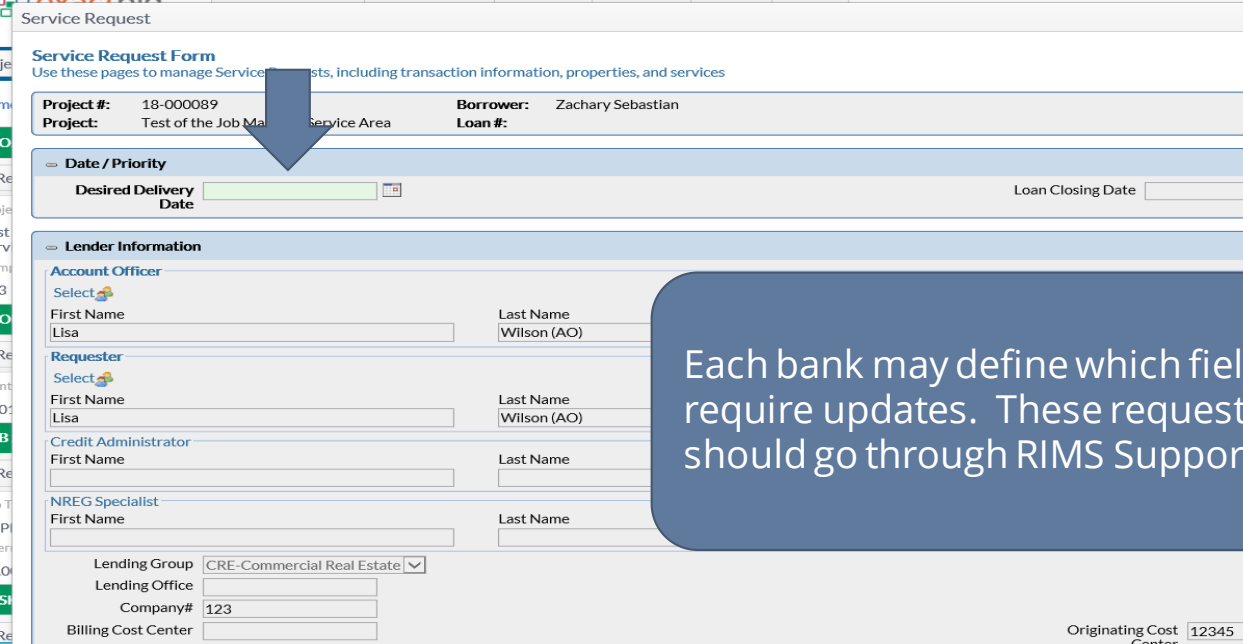
Tier Two – Adding a Service to an older Service Request which has moved to Tier 2

When adding a service to an older service request that has moved to Tier 2, the user will be able to navigate to the service and click on the **“Add Service”** link. From there they can add the service normally, but when they hit the **“Send Selected Services”** button, they will encounter a pop up that directs them to update certain pieces of information.

The screenshot displays the 'Service Request' interface. At the top, there's a header with the address '43810 N 20th Street, New River, AZ 85087' and a 'View Property' link. Below this, there are two main sections for service requests. The first section, titled 'Appraisal (Order)', shows a delivery date of '09/06/2018' and a status of 'Sent 08/28/2018'. The second section, titled 'Appraisal Review', shows a delivery date of '09/06/2019' and a status of 'Sent 09/26/2018'. A third section, titled 'Phase I ESA (Order)', shows a delivery date of '09/10/2019' and a status of 'Unsent'. A modal dialog box titled 'Message from webpage' is overlaid on the interface. It contains a question mark icon and the text: 'You are required to update Service Request information before you can send services. You will be redirected to the Service Request form page, and your selected services will be sent once you Save and Continue from there. Would you like to continue?'. The dialog has 'OK' and 'Cancel' buttons. At the bottom of the interface, there are buttons for 'Save Details for All', 'Send Selected Services', and 'Attach Property Documents'. A footer note states: 'To add services to an additional Property, click the "Add Services to New Property" button' with a corresponding button.

Tier Two – Adding a Service to an older Service Request which has moved to Tier 2

When they click on “OK”, they will be taken to the Service Request where they will find certain fields have been highlighted Green and cleared out. They will need to enter the correct current information into each of these fields before they can **Save and Send** the service request.



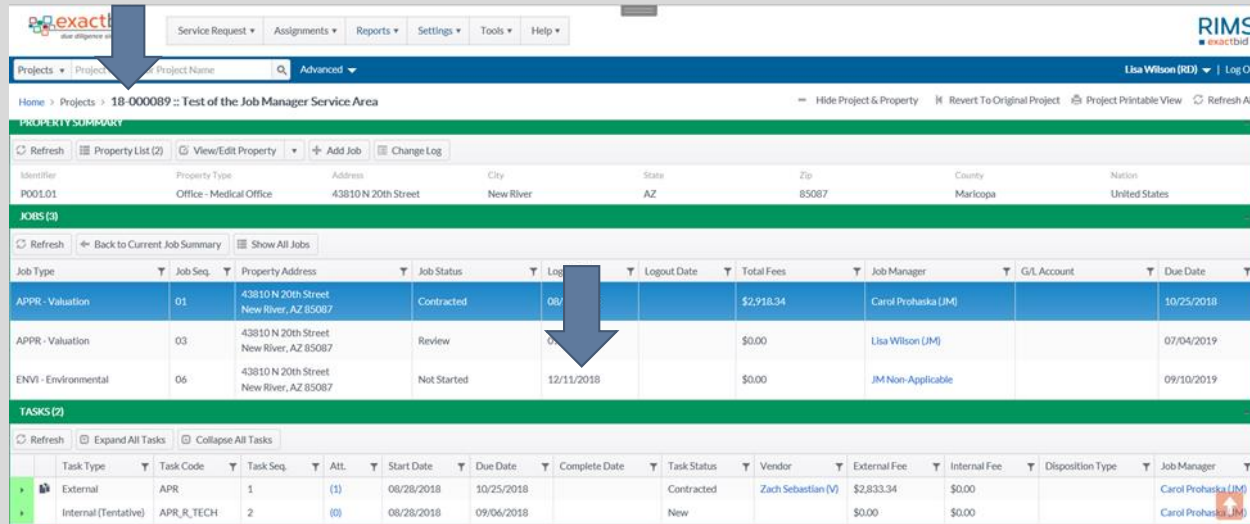
The screenshot shows a 'Service Request Form' with the following sections and fields:

- Service Request Form**
Use these pages to manage Service Requests, including transaction information, properties, and services
- Project #:** 18-000089
Project: Test of the Job Market Service Area
Borrower: Zachary Sebastian
Loan #:
- Date / Priority**
 - Desired Delivery Date:** (highlighted in green)
 - Loan Closing Date:**
- Lender Information**
 - Account Officer:**
 - Select
 - First Name: Lisa
 - Last Name: Wilson (AO)
 - Requester:**
 - Select
 - First Name: Lisa
 - Last Name: Wilson (AO)
 - Credit Administrator:**
 - First Name:
 - Last Name:
 - NREG Specialist:**
 - First Name:
 - Last Name:
- Lending Group:** CRE-Commercial Real Estate (dropdown menu)
- Lending Office:**
- Company#:** 123
- Billing Cost Center:**
- Originating Cost Center:** 12345

Each bank may define which fields require updates. These requests should go through RIMS Support.

Tier Two – Adding a Service to an older Service Request which has moved to Tier 2

Once the Service has been sent, it will be added to the Existing Project as a new Service.



The screenshot displays the 'exact! RIMS' web application interface. The top navigation bar includes links for 'Service Request', 'Assignments', 'Reports', 'Settings', 'Tools', and 'Help'. The user is logged in as 'Lisa Wilson (RD)'.

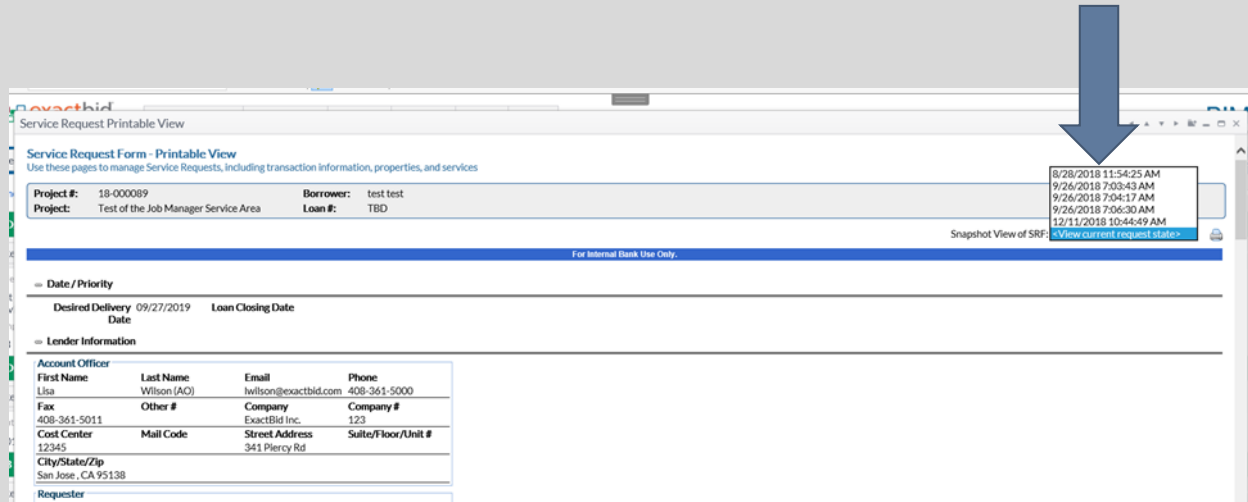
The main content area shows a project summary for '18-000089 :: Test of the Job Manager Service Area'. Below this, there is a 'PROPERTY SUMMARY' section with a table of property details. The 'JOBS' section contains a table of job entries. A blue arrow points to the 'Add Job' button in the 'PROPERTY SUMMARY' section. Another blue arrow points to the 'Log' column in the 'JOBS' table.

Job Type	Job Seq.	Property Address	Job Status	Log	Logout Date	Total Fees	Job Manager	G/L Account	Due Date
APPR - Valuation	01	43810 N 20th Street New River, AZ 85087	Contracted	06/11/2018		\$2,918.34	Carol Prohaska (JM)		10/25/2018
APPR - Valuation	03	43810 N 20th Street New River, AZ 85087	Review	06/11/2018		\$0.00	Lisa Wilson (JM)		07/04/2019
ENVI - Environmental	06	43810 N 20th Street New River, AZ 85087	Not Started	12/11/2018		\$0.00	JM Non-Applicable		09/10/2019

Task Type	Task Code	Task Seq.	Att.	Start Date	Due Date	Complete Date	Task Status	Vendor	External Fee	Internal Fee	Disposition Type	Job Manager
External	APR	1	(1)	06/28/2018	10/25/2018		Contracted	Zach Sebastian (V)	\$2,833.34	\$0.00		Carol Prohaska (JM)
Internal (Tentative)	APR_R_TECH	2	(0)	08/28/2018	09/06/2018		New		\$0.00	\$0.00		Carol Prohaska (JM)

Tier Two – Adding a Service to an older Service Request which has moved to Tier 2

The Printable Service Request form will allow both the Job Manager and the Account Officer to go in and view a snapshot of the Service Request seeing exactly what was on the request each time that it was sent.



Service Request Printable View

Service Request Form - Printable View
Use these pages to manage Service Requests, including transaction information, properties, and services

Project #: 18-00089 Borrower: test test
Project: Test of the Job Manager Service Area Loan #: TBD

Snapshot View of SRF: [View current request state](#)

For Internal Bank Use Only.

— Date / Priority

Desired Delivery 09/27/2019 Loan Closing Date

— Lender Information

Account Officer			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-5000
Fax	Other #	Company	Company #
408-361-5011		ExactBid Inc.	123
Cost Center	Mail Code	Street Address	Suite/Floor/Unit #
12345		341 Piercy Rd	
City/State/Zip			
San Jose, CA 95138			
Requester			

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

When a Service Request has reached Tier 3, the user will see an pop up immediately upon hitting the Add Services Link. This pop up will direct them to a 'cloned' service request.

Service Request Form - Services
Use these pages to manage Service Requests, including transaction information, properties, and services

Project #: 16-000050	Borrower: Susie Sunshine
Project: Smoke test 8.2.7.1 - SRF as an AO	Loan #: Test

[Service Request](#) | [Services](#) | [View Printable](#)

Select checkboxes for services you are ready to send now.

Smoke test property one 8.2.7.1, New River, AZ 85087 [View Property](#)

Appraisal (Order) [Delivery: 12/12/2016] Sent 12/09/2016

[Add Services](#)

[Attach Property Documents](#)

[Save Details for All](#) [Add Service\(s\) to all Properties](#) [Attach Property Documents](#)

To **add services to an additional Property**, click the 'Add Services to New Property' button

[Add Services to New Property](#)

Message from webpage

Due to the age of this request, adding a new service to this request requires a new request to be created. You will be redirected to the Service Request Form to complete a new linked Service Request.

After the Service Request is cloned, please repeat the Add Services operation.

Would you like to continue?

[OK](#) [Cancel](#)

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

The page that they are taken to will be a Draft Service Request that has certain fields pre-populated with data from the original request and other fields cleared out requiring new data to be entered. All fields will be editable.

First Name Art	Last Name / Entity Borrower	Email Test@test.com	Phone 555-555-5555
-------------------	--------------------------------	------------------------	-----------------------

Previous
No

Report
New / Existing
Loan

Loan
Amount

Loan
Purpose
New Loan

Loan Term
30 Years

Amortization
30 Years

Risk Rating
06

Lien Position
First Lien

Recourse
Yes

Additional
Collateral
No

Participation
Loan
No

Transaction
Comments

Loan Number (TBD if unknown)

Proposed LTV

Is this HUD?
No

SBA Involvement
No

Property Information

Actions	Property Address	Property Type
[Edit] [Delete]	2345 W Desert Hills Dr, Phoenix View Map	Retail-Commercial-Other
[Edit] [Delete]	6543 Gold Mountain Pass, Phoenix View Map	Retail-Commercial-Other
[Edit] [Delete]	9665 N Cave Creek Rd, Phoenix View Map	Retail-Commercial-Other
[Edit] [Delete]	1234 Main street, New River View Map	Office-Creative/Loft

Choose a Property Type and click the 'Add Additional Property' button

Add Additional Property

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

The property or properties from the original request will be displayed for selection at the bottom of the page and you may opt to include some or all of the properties for the new request.

Service Request

Amount

Loan Purpose

Loan Term

Amortization

Risk Rating

Lien Position

Recourse

Additional Collateral

Participation Loan

Transaction Comments

New Loan

30

30

06

First Lien

Yes

No

No

Loan Number (TBD if unknown)

12345

Proposed LTV

Is this HUD?

SBA Involvement

No

No

0/2024


Property Information

Actions	Property Address	Property Type
[<input checked="" type="checkbox"/> Clone]	2345 W Desert Hills Dr, Phoenix View Map	Retail-Commercial-Other
[<input checked="" type="checkbox"/> Clone]	6543 Gold Mountain Pass, Phoenix View Map	Retail-Commercial-Other
[<input checked="" type="checkbox"/> Clone]	9665 N Cave Creek Rd, Phoenix View Map	Retail-Commercial-Other
[<input checked="" type="checkbox"/> Clone]	1234 Main street, New River View Map	Office-Creative/Loft

→ Save and Continue

Save Request as Draft

✕ Cancel Request



Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

When a cloned service request is created and the properties are carried over, you should expect to be required to update the Property Tenancy and/or Status. At the Services page, you will see an indication that the property is missing required fields. Simply click on the Edit Property Link and make the required updates.

Home > Assignments > My Unsent Requests

Project #:	Draft-190116-496	Borrower:	Art
Project:	Sunshine Portfolio 2019 Construction	Loan #:	12345

4 Properties have incomplete data.
At least one Property below has missing required fields. Services for incomplete Properties cannot be sent until the data is complete.

There are 4 properties without services.

2345 W Desert Hills Dr, Phoenix, AZ 85001

Edit Property | Delete Property

Incomplete: Property has missing required fields. Please click Edit Property to fix.
Missing fields: Property Contacts, Pending/Recent Sale?, Listed For Sale?

Add Services

6543 Gold Mountain Pass, Phoenix, AZ 85083

Edit Property | Delete Property

Incomplete: Property has missing required fields. Please click Edit Property to fix.
Missing fields: Property Contacts, Pending/Recent Sale?, Listed For Sale?

Add Services

9665 N Cave Creek Rd, Phoenix, AZ 85024

Edit Property | Delete Property

Incomplete: Property has missing required fields. Please click Edit Property to fix.
Missing fields: Property Contacts, Pending/Recent Sale?, Listed For Sale?

Home > Assignments > My Unsent Requests

Project #:	Draft-190116-496	Borrower:	Art Borrower
Project:	Sunshine Portfolio 2019 Construction	Loan #:	12345

Property Information

Edit

Property type:

Retail-Commercial - Other

Status:

Existing

Tenancy:

Property Information

Property Name

Street Address

2345 W Desert Hills Dr

Suite/Floor/Unit#

City

Phoenix

State

AZ

Zip Code

85001

County

Maricopa

Nation

United States

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

Once the required fields have been completed and the properties have been cloned, the user will then need to select the services for each property, since the cloning process will put that step at the end.

The screenshot displays the exactbid web application interface. At the top, the logo "exactbid" is visible with the tagline "due diligence simplified". Navigation tabs include "Service Request", "Assignments", "Reports", "Tools", and "Help". Below these, a search bar contains "Projects" and "Project Number", with a search icon and a dropdown menu labeled "Advanced".

The main content area shows a table with the following details:

Project #:	Draft-181211-714	Borrower:	Susie Sunshine
Project:	test	Loan #:	Test

Below the table, a message states: "There are 1 properties without services." A red arrow points from the "Project #:" field to this message.

The next row shows a property: "Smoke test property one 8.2.7.1, New River, AZ 85087". To the right of this property are links for "Edit Property" and "Delete Property". Below the property name is a green plus icon followed by the text "Add Services", which is highlighted with a red arrow.

At the bottom of the main content area, there are three buttons: "Save Details for All", "Send Selected Services", and "Add Service(s) to all Properties".

A callout box at the bottom left contains the text: "To add services to an additional Property, click the 'Add Services to New Property' button". Inside this box is a button labeled "Add Services to New Property".

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

When the new service is sent, the draft number will be converted to a project number with the current year's prefix and that new project will be tied to the original project as a “Related” project which can be viewed by clicking on the **Related Projects** button shown here.

The screenshot displays the exactbid RIMS web application interface. At the top, there is a navigation bar with the exactbid logo and a menu with options: Service Request, Assignments, Reports, Settings, Tools, and Help. On the right side of the navigation bar, the user's name 'Lisa Wilson (RD)' and a 'Log Out' link are visible.

Below the navigation bar, a search bar is present with the text 'Project Number or Project Name' and a search icon. To the right of the search bar, there is a dropdown menu labeled 'Advanced'. The main content area shows a breadcrumb trail: 'Home > Project > 18-000106 :: Example Cloned from 2016 Job'. To the right of the breadcrumb trail, there are several action links: 'Hide Project & Property', 'Revert To Original Project', 'Project Printable View', and 'Refresh All'.

The main content area is divided into two sections: 'PROJECT SUMMARY' and 'PROPERTY SUMMARY'. The 'PROJECT SUMMARY' section has a green header and contains a table with project details. A mouse cursor is pointing at the 'Related Projects (1)' button in the toolbar above the table. The 'PROPERTY SUMMARY' section also has a green header and contains a table with property details.

PROJECT SUMMARY

Project Name	Project #	Borrower	Lending Group	Account Officer	Requester	Production Administrator	Purpose
Example Cloned from 2016 Job	18-000106	Susie Sunshine	CRE - Commercial Real Estate	Lisa Wilson (AO)	Lisa Wilson (AO)	PA Non-Applicable	New Loan
Company #	Cost Center	Loan #	Loan Amount	New Money	Active		
123	12345	Test	\$9,000,000.00	No	Yes		

PROPERTY SUMMARY

Identifier	Property Type	Address	City	State	Zip	County	Nation
P001.01	Office - Creative/Loft	Smoke test property one 8.2.7.1	New River	AZ	85087	Maricopa	United States

JOB SUMMARY | P001.01 Smoke test property one 8.2.7.1 New River AZ 85087

Job Type	Job Seq.	Job Status	Login Date	Job Manager	Service Office	G/L Account	Due Date
ADD - Addition	01	Not Started	12/14/2018	Greg Cowie (RM)	Default Service Office	12345678	01/01/2019

Tier Three – Adding a Service to an aged Service Request or at the change of the year - Tier 3

Opening the Related Project will allow you to view the project details for the original project right from there. Note that although we see project 18-000106 above, the details below are for the related Project 16-000050



Home

>

Projects

>

18-000106 :: Example Cloned from 2016 Job

Hide Project & Property

Revert To Original Project

Project Printable View

Refresh All

PROJECT SUMMARY

Refresh

Related Projects (1)

Edit Project

Add Property

Change Lending Group

SRF Printable View

Service Request

Logs

Email

Project Comments (1)

Create/Edit Portfolio RFP

Service Charge Summary

Project Name	Project	Borrower	Lending Group	Account Officer	Requester	Production Administrator	Purpose
Smoke test 8.2.7.1 - SRF as an AO	16-000050	Susie Sunshine	CRE - Commercial Real Estate	Lisa Wilson (AO)	Lisa Wilson (AO)	PA Non-Applicable	New Loan
Company #	Cost Center	Loan #	Loan Amount	Loan Type	Risk Rating	New Money	Active
123	12345	Test	\$9,000,000.00	OREO	5	No	Yes

PROPERTIES (1)

Refresh

Back to Current Property Summary

Identifier	Property Name	Property Type	Address	City	State	Zip	County	Nation
P001.01		Office - Creative/Loft	Smoke test property one 8.2.7.1	New River	AZ	85087	Maricopa	United States

JOBS (2)

Refresh

Show All Jobs

Job Type	Job Seq.	Property Address	Job Status	Login Date	Logout Date	Total Fees	Job Manager	G/L Account	Due Date
APPR - Valuation	01	Smoke test property one 8.2.7.1 New River, AZ 85087	Completed	12/09/2016	12/09/2016	\$2,575.00	Kortney Horn	123Sample	12/16/2016

Tier Three – Adding a Service to an aged Service Request or at the change of the year

It is recommended that you ***always*** use the **Revert to Original Project** link to return to the current view when you are finished viewing a related project.

Home > Projects > 18-000106 :: Example Cloned from 2016 Job

Project & Property | **Revert To Original Project** | Project Printable View | Refresh All

PROJECT SUMMARY

Refresh | Related Projects (1) | View/Edit Project | Add Property | Change Lending Group | SRF Printable View | Service Request | Logs | Email | Project Comments (1) | Create/Edit Portfolio RFP | Service Charge Summary

Project Name	Project #	Borrower	Lending Group	Account Officer	Requester	Production Administrator	Purpose
Smoke test 8.2.7.1 - SRF as an AO	16-000050	Susie Sunshine	CRE - Commercial Real Estate	Lisa Wilson (AO)	Lisa Wilson (AO)	PA Non-Applicable	New Loan
Company #	Cost Center	Loan #	Loan Amount	Loan Type	Risk Rating	New Money	Active
123	12345	Test	\$9,000,000.00	OREO	5	No	Yes

PROPERTIES (1)

Refresh | Back to Current Property Summary

Identifier	Property Name	Property Type	Address	City	State	Zip	County	Nation
P001.01		Office - Creative/Loft	Smoke test property one 8.2.7.1	New River	AZ	85087	Maricopa	United States

JOBS (2)

Refresh | Show All Jobs

Job Type	Job Seq.	Property Address	Job Status	Login Date	Logout Date	Total Fees	Job Manager	G/L Account	Due Date
APPR - Valuation	01	Smoke test property one 8.2.7.1 New River, AZ 85087	Completed	12/09/2016	12/09/2016	\$2,575.00	Kortney Horn	123Sample	12/16/2016

Questions?