

Job Manager Navigating the Project

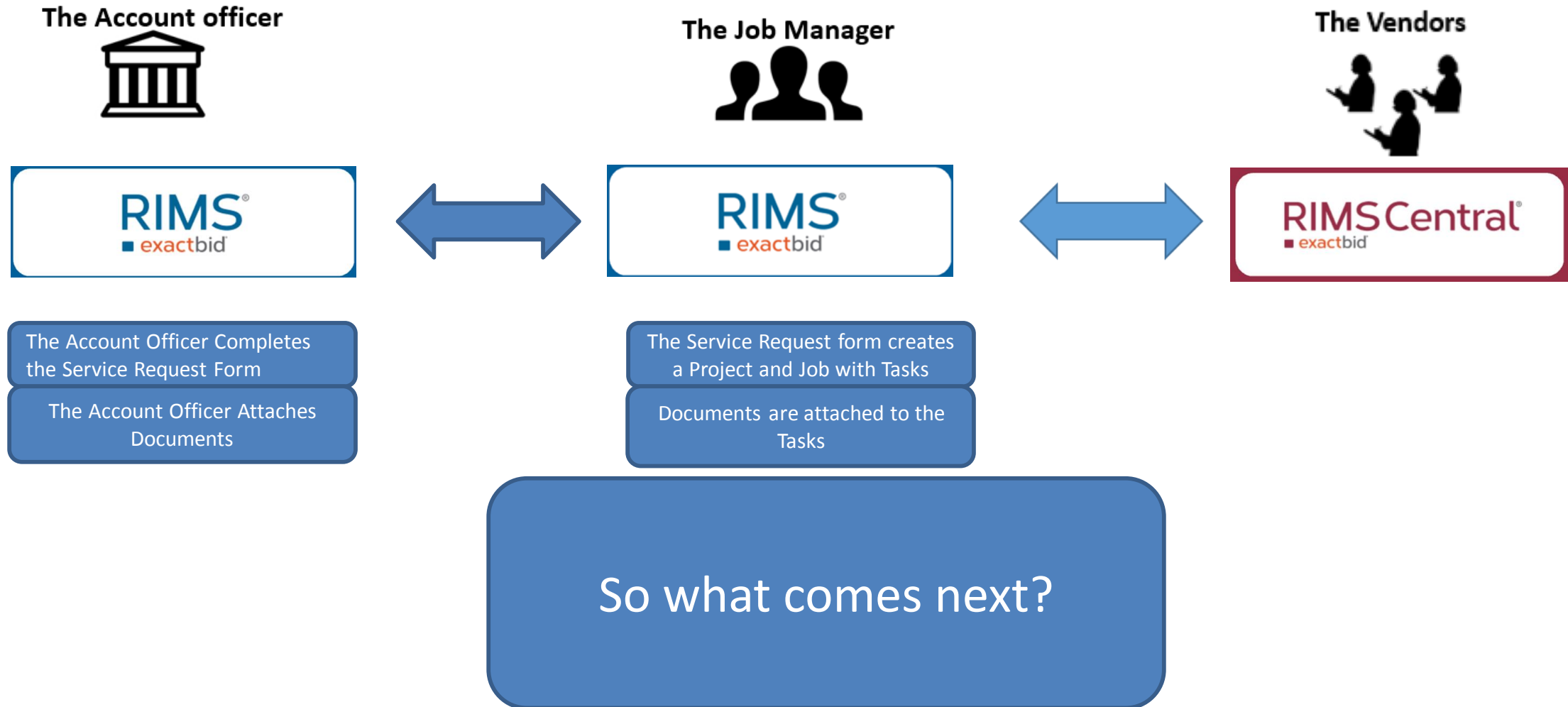
October 2017

Job Manager Workflow



Every Project in RIMS starts with a Service Request form...

Job Manager Workflow



The Structure of the RIMS Project, Properties, Jobs and Tasks

When the Service Request is sent by the Account Officer, the information in the Service Request is used to create a Project, Properties, Jobs, Tasks and Task Attachments.

The Project is the top of the pyramid and is the same as the Transaction Information on the Service Request. At the project Level, there is a 1:1 relationship. 1 Borrower, 1 Loan Amount, 1 Account officer

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

Project #: 17-000660	Borrower: Joe Dalton
Project: Dalton's Furniture	Loan #: 12387

Date / Priority

Desired Delivery Date: 08/04/2017

Priority: Normal Loan Closing Date:

Lender Information

Account Officer			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-9000
Requester			
First Name	Last Name	Email	Phone
Lisa	Wilson (AO)	lwilson@exactbid.com	408-361-9000
Loan Administrator			
First Name	Last Name	Email	Phone

Lending Group: CRE-Commercial Real Estate

Company#: 123

Billing Cost Center: 12345

Transaction Information

Project Name: Dalton's Furniture

Borrower			
First Name	Last Name / Entity	Email	Phone
Joe	Dalton	JD@none.com	

Previous Report: No

New / Existing Loan: New

Loan Amount: \$600,000

Loan Purpose: New Loan

Loan Number (TBD if unknown): 12387

The Structure of the RIMS Project, Properties, Jobs and Tasks

PROJECT

Next are the properties. A project may have one property associated it with or multiple properties. Information entered at the Property Level of the Service Request creates the property or properties associated with the project.

Edit Property
Use this page to manage property information

Project #: 17-000060	Borrower: Joe Dalton
Project: Dalton's Furniture	Loan #: 12387

Property Information [Edit](#)

Property type: Retail-Commercial - Street Retail
Status: Existing **Tenancy:** Owner Occupied 100%

Property Information

Property Name: Dalton's Furniture

Street Address: 4855 West Oak leaf Road Suite/Floor/Unit#

City: New River State: AZ Zip Code: 85087 Find City/State/Zip

County: Maricopa

Nation: United States

Latitude Longitude

Assessor's Parcel Number Parcel Number

Legal Description

Property/Collateral Description: Sample property comments

Property Contacts

Affiliation	First Name	Last Name	Phone	Email	Fax	Other
Account Officer	Lisa	Wilson (AO)	408-361-5000	lwilson@exactbid.com	408-361-5011	

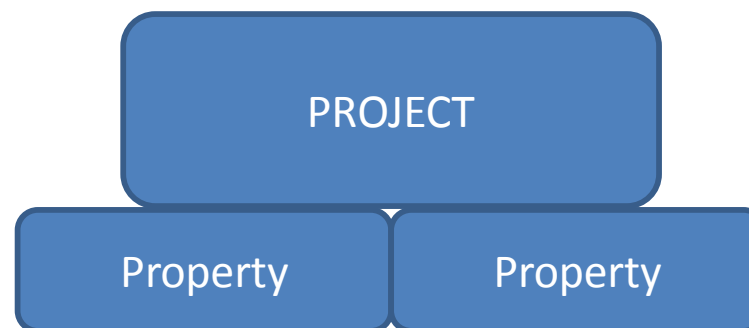
Additional Property Information

Primary Improvement Size: 4,800 SF Site Size: 2 Acres

Approximate Year Built

Year Last Renovated

The Structure of the RIMS Project, Properties, Jobs and Tasks



Next, there is at least one job for every property. The Job is created by the Specific Service being requested on the Service Request. It is typically something like “Order an Appraisal”, or “Order an Environmental” One or more of these services can be requested for each property.


Service Request


Service Request Form - Services

Use these pages to manage Service Requests, including transaction information, properties, and services

Project #:	17-000060	Borrower:	Joe Dalton
Project:	Dalton's Furniture	Loan #:	12387

 4855 West Oak leaf Road, New River, AZ 85087 [View Property](#)

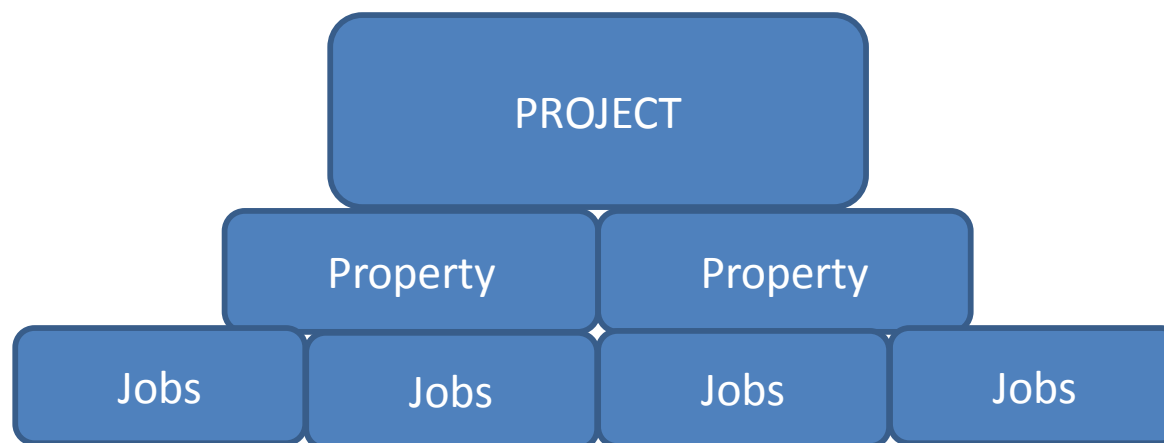
1  Phase I ESA (Order) [Delivery: 08/04/2017]

2  Appraisal (Order) [Delivery: 08/04/2017]

 [Add Services](#)

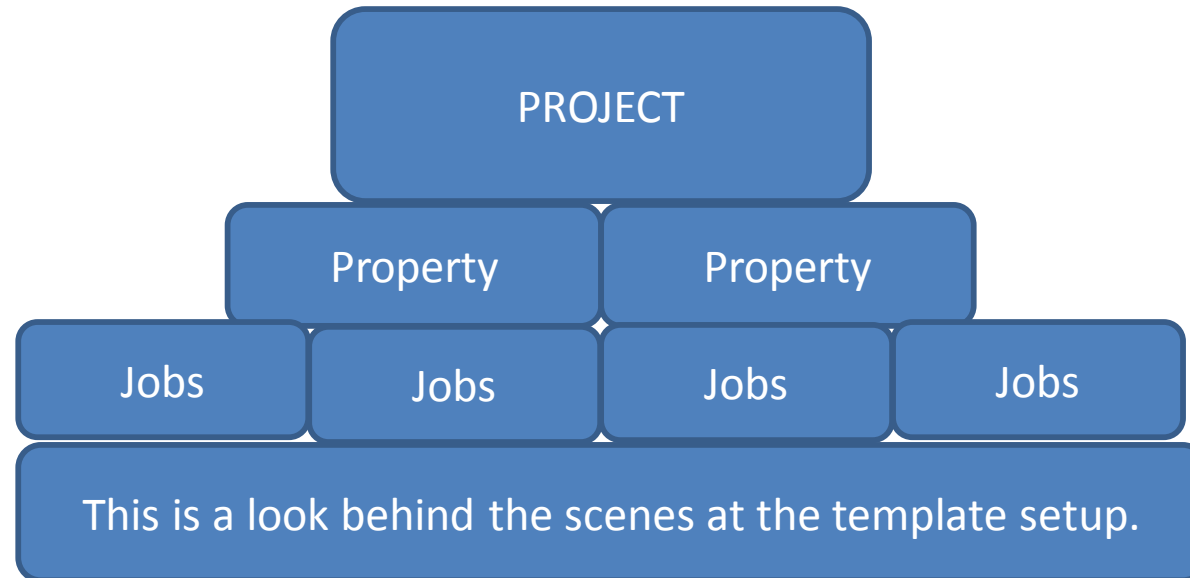
 [Attach Property Documents](#)

The Structure of the RIMS Project, Properties, Jobs and Tasks



Each Job will have some specific actions that need to be accomplished in order fulfill the request. Depending upon what s being requested, this may be a single action or it may be a multi-step process. For example, most banks require the appraisals to be reviewed so there are at least two tasks: 1. Order the Appraisal and 2. Review the Appraisal. These are created automatically based on the bank's policy and RIMS set up for their site.

The Structure of the RIMS Project, Properties, Jobs and Tasks



Request Types » Base » Service types

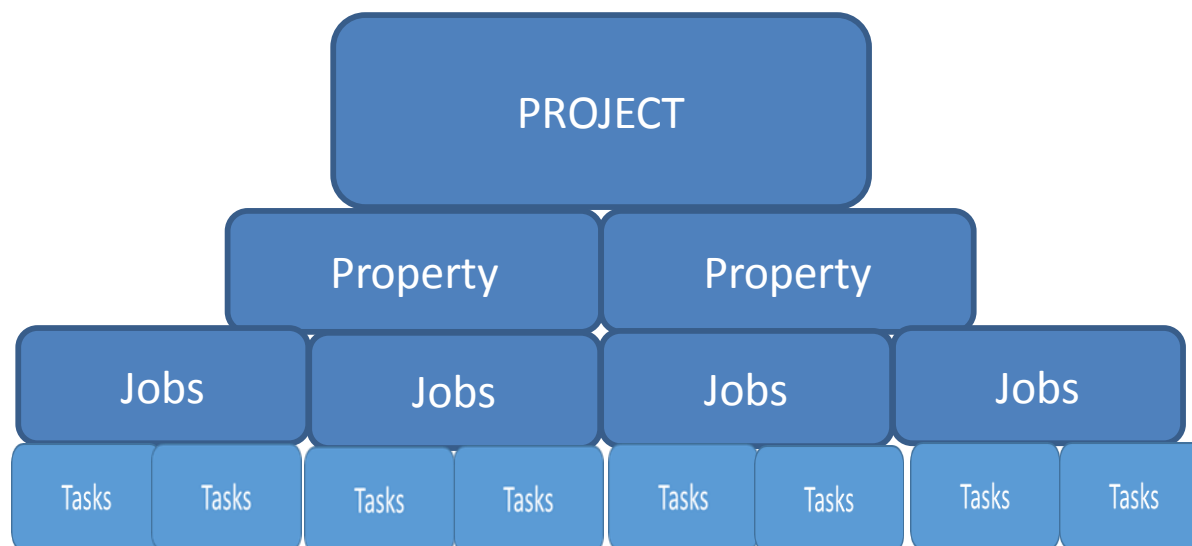
Base : Service Types

 Add Group

Group: Appraisal Services [ edit |  remove]

Name	Description	Job type	Task Code(s)
 Appraisal (Order)		Valuation	APR - Appraisal Order APR_R_TECH - Appraisal Review - Technical

The Structure of the RIMS Project, Properties, Jobs and Tasks



Finally, documents can be attached to the Service Request for each Property. These documents will get carried over as Task Attachments for every Task that is associated with that property.


Service Request

Service Request Form - Services

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Project #:	17-000060	Borrower:	Joe Dalton
Project:	Dalton's Furniture	Loan #:	12387

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 Phase I ESA (Order) [Delivery: 08/04/2017]

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 [Add Services](#)

 [Attach Property Documents](#)

The Structure of the RIMS Project, Properties, Jobs and Tasks

