

RIMS University: Portfolio

December 19, 2017

Presented by: Nicole Westhaver, Director RIMS Customer Support

Subject: Portfolio

- Overview

RIMS Portfolio feature allows Job Managers and Content Administrators to create a single RFP, Award, and Engagement letter for multiple Properties within a Project.

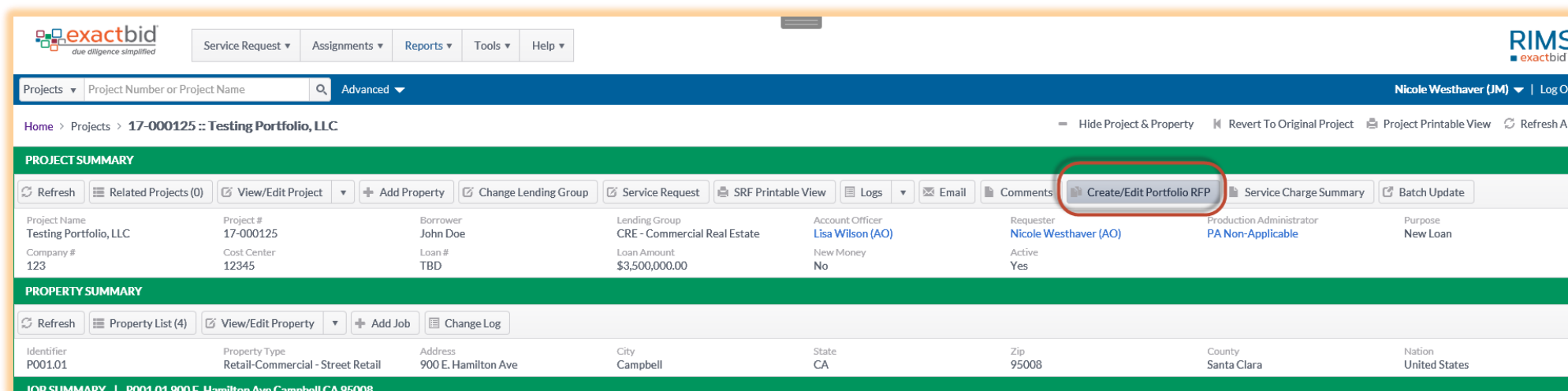
- Topics for this session

- Create a Portfolio and Send RFP (*as a JM*)
- Bid on a Portfolio Assignment (*as a Vendor*)
- View and Authorize a Bid (*as an AO*)
- Award RFP and View Engagement Letter (*as a JM*)
- View Award and Engagement Letter, Upload Documents (*as Vendor on RIMSCentral*)
- View Documents and Complete Portfolio Project (*as a JM*)
- Questions

RIMS Portfolio

How to Create a Portfolio

- A Project is not a Portfolio until a Job Manager **Creates Portfolio RFP**
 - JM must check Properties from same Job Type and Service Office
 - JM must enter **Portfolio Identifier** and then **Save** or **Save and Manage RFP**



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Service Request ▾ Assignments ▾ Reports ▾ Tools ▾ Help ▾

Projects ▾ Project Number or Project Name Advanced ▾

Nicole Westhaver (JM) | Log Out

Home > Projects > 17-000125 :: Testing Portfolio, LLC

Hide Project & Property Revert To Original Project Project Printable View Refresh All

PROJECT SUMMARY

Refresh Related Projects (0) View/Edit Project ▾ + Add Property Change Lending Group Service Request SRF Printable View Logs ▾ Email Comments **Create/Edit Portfolio RFP** Service Charge Summary Batch Update

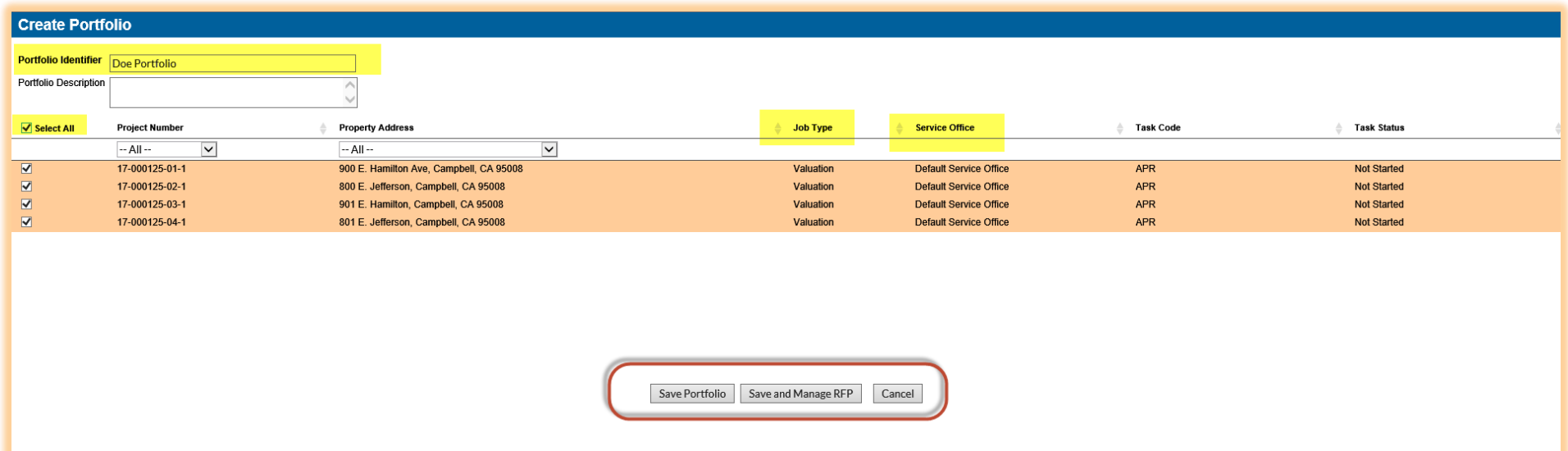
Project Name Testing Portfolio, LLC	Project # 17-000125	Borrower John Doe	Lending Group CRE - Commercial Real Estate	Account Officer Lisa Wilson (AO)	Requester Nicole Westhaver (AO)	Production Administrator PA Non-Applicable	Purpose New Loan
Company # 123	Cost Center 12345	Loan # TBD	Loan Amount \$3,500,000.00	New Money No	Active Yes		

PROPERTY SUMMARY

Refresh Property List (4) View/Edit Property ▾ + Add Job Change Log

Identifier P001.01	Property Type Retail-Commercial - Street Retail	Address 900 E. Hamilton Ave	City Campbell	State CA	Zip 95008	County Santa Clara	Nation United States
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JOB SUMMARY | P001.01 900 E. Hamilton Ave Campbell CA 95008



Create Portfolio

Portfolio Identifier

Portfolio Description

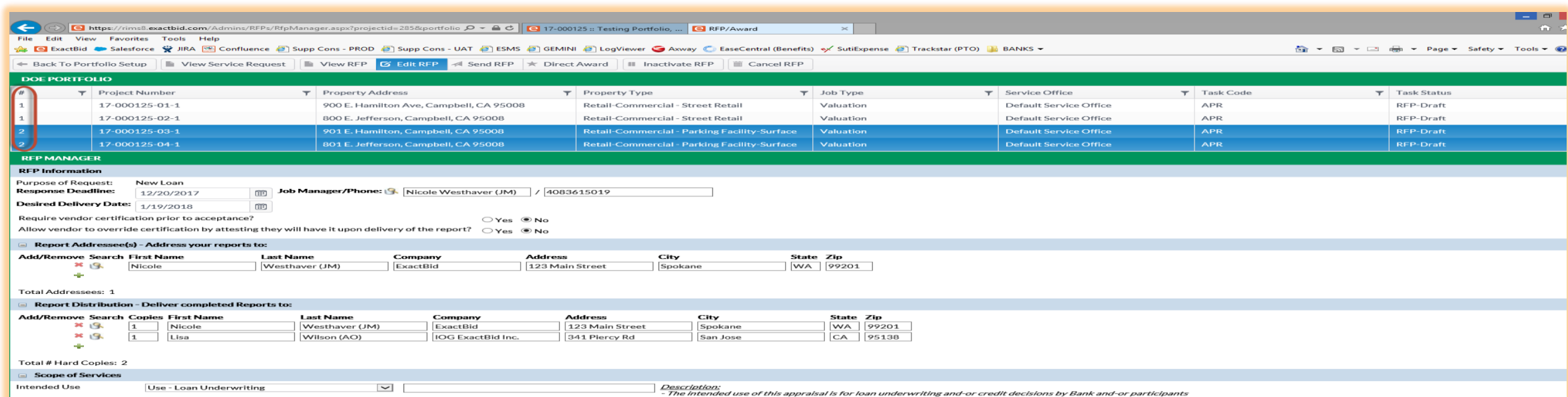
☒ Select All

	Project Number	Property Address	Job Type	Service Office	Task Code	Task Status
<input checked="" type="checkbox"/>	17-000125-01-1	900 E. Hamilton Ave, Campbell, CA 95008	Valuation	Default Service Office	APR	Not Started
<input checked="" type="checkbox"/>	17-000125-02-1	800 E. Jefferson, Campbell, CA 95008	Valuation	Default Service Office	APR	Not Started
<input checked="" type="checkbox"/>	17-000125-03-1	901 E. Hamilton, Campbell, CA 95008	Valuation	Default Service Office	APR	Not Started
<input checked="" type="checkbox"/>	17-000125-04-1	801 E. Jefferson, Campbell, CA 95008	Valuation	Default Service Office	APR	Not Started

RIMS Portfolio

Create and Send Portfolio RFP

- Once JM clicks **Save and Manage RFP**, the RFP page will load, and the JM can select which Properties to include in the RFP
 - Note: the JM can create multiple RFPs within a Portfolio to include a unique scope of work for each property or property types*
- When all Properties have had an RFP created, the JM will see the buttons to **Send RFP, Edit RFP, Direct Award**, etc.
- The JM will click on **Send RFP**, and **Select/Edit Recipients**, choose their Vendors and then **Send RFP**



DOE PORTFOLIO

#	Project Number	Property Address	Property Type	Job Type	Service Office	Task Code	Task Status
1	17-000125-01-1	900 E. Hamilton Ave, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP-Draft
1	17-000125-02-1	800 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP-Draft
2	17-000125-03-1	901 E. Hamilton, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP-Draft
2	17-000125-04-1	801 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP-Draft

RFP MANAGER

RFP Information

Purpose of Request: New Loan
 Response Deadline: 12/20/2017
 Desired Delivery Date: 1/19/2018
 Job Manager/Phone: Nicole Westhaver (JM) / 4083615019

Require vendor certification prior to acceptance? ☐ Yes ☒ No
 Allow vendor to override certification by attesting they will have it upon delivery of the report? ☐ Yes ☒ No

Report Addressee(s) - Address your reports to:

Add/Remove	Search	First Name	Last Name	Company	Address	City	State	Zip
		Nicole	Westhaver (JM)	ExactBid	123 Main Street	Spokane	WA	99201

Total Addressees: 1

Report Distribution - Deliver completed Reports to:

Add/Remove	Search	Copies	First Name	Last Name	Company	Address	City	State	Zip
		1	Nicole	Westhaver (JM)	ExactBid	123 Main Street	Spokane	WA	99201
		1	Lisa	Wilson (AO)	IOG ExactBid Inc.	341 Piercy Rd	San Jose	CA	95138

Total # Hard Copies: 2



Scope of Services

Intended Use: ☒ Use - Loan Underwriting
 Description: The intended use of this appraisal is for loan underwriting and-or credit decisions by Bank and-or participants

RIMS Portfolio

How to Bid on a Portfolio Assignment

- Vendors will receive an email notification of a new bidding opportunity
- In RIMSCentral, they click on **RFP** tab and **View Details**
 - They can also select the **More** link for specific scope of work and additional Properties details
- Vendors can enter Bids and proposed delivery dates individually or across all Properties, and then click **Place Bid**

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RIMS Customer: RIMS8
Project #: 17-000125-PFL

Job Number	Property Type	Property Location	Property Size	Response Deadline	Desired Delivery Date	Scope of Work	Delivery Date	Bid Amount
17-000125-03-1	Retail-Commercial - Parking Facility-Surface	901 E. Hamilton Campbell, CA map	Imp. Size: 20 Spaces Land Size: 2 Acres More	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and-or credit decisions by Bank and-or participants User - Bank The intended users of this report is Bank and-or affiliates More	<input type="text" value="01/19/2018"/>	<input type="text" value="\$"/>
17-000125-04-1	Retail-Commercial - Parking Facility-Surface	801 E. Jefferson Campbell, CA map	Imp. Size: 20 Spaces Land Size: 2 Acres More	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and-or credit decisions by Bank and-or participants User - Bank The intended users of this report is Bank and-or affiliates More	<input type="text"/>	<input type="text" value="\$"/>
17-000125-01-1	Retail-Commercial - Street Retail	900 E. Hamilton Ave Campbell, CA map	Imp. Size: 3 Units Land Size: 2 Acres More	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and-or credit decisions by Bank and-or participants User - Bank The intended users of this report is Bank and-or affiliates More	<input type="text"/>	<input type="text" value="\$"/>
17-000125-02-1	Retail-Commercial - Street Retail	800 E. Jefferson Campbell, CA map	Imp. Size: 3 Units Land Size: 2 Acres More	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and-or credit decisions by Bank and-or participants User - Bank The intended users of this report is Bank and-or affiliates More	<input type="text"/>	<input type="text" value="\$"/>

Signatory Information

Office Location

*Services provided for any portfolio property in past 3 years?
(If Yes, please describe in Bid Comments below)
☐ Yes
☒ No

Bid Comments

Individual bids total

*Portfolio bids total
[Spread across all bids](#)

*Portfolio delivery date
[Set all bids to this date](#)

[Place Bid](#)

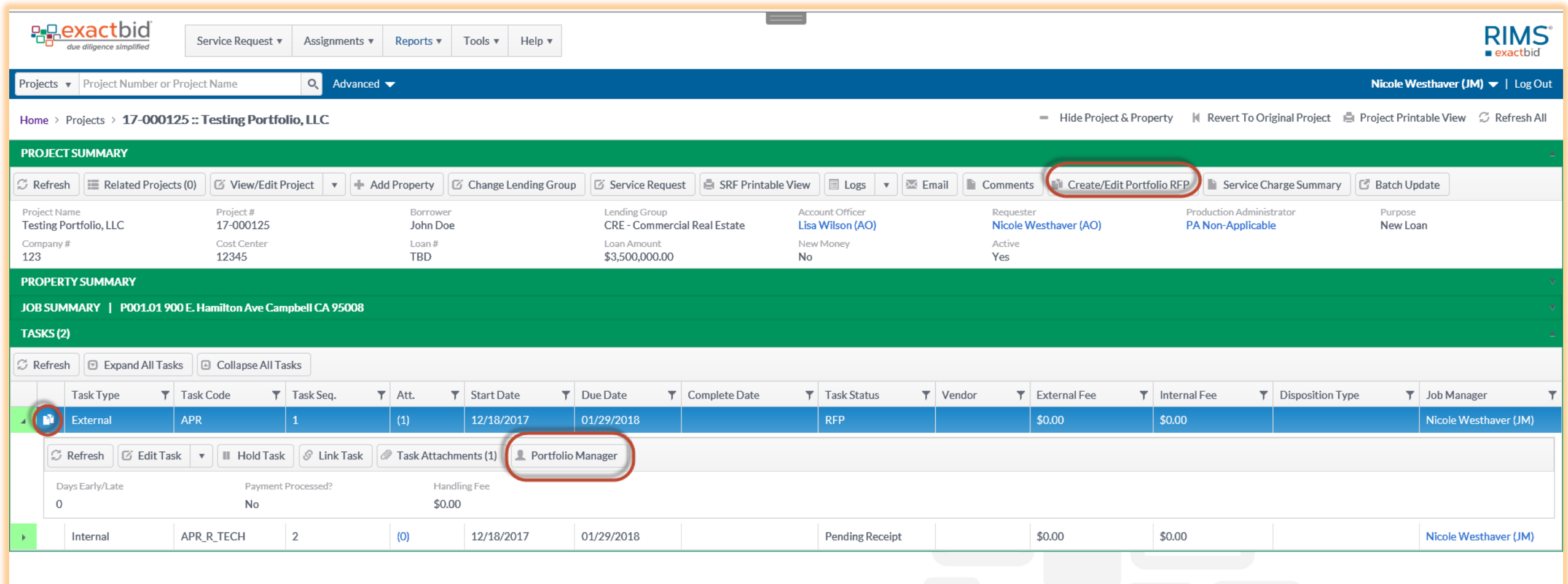
[Draft Mode Enabled](#)

Bid is in Draft Mode. If you close the

RIMS Portfolio

How to View Bids and Send RFP Bids for Authorization

- When Bids have been received, JM can select **Portfolio Manager**, add comments (if applicable), and click **Send for Authorization** to notify Account Officers of their need to approve a Bid



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Service Request ▾ Assignments ▾ Reports ▾ Tools ▾ Help ▾

Projects ▾ Project Number or Project Name Advanced ▾

Nicole Westhaver (JM) ▾ | Log Out

Home > Projects > 17-000125 :: Testing Portfolio, LLC

Hide Project & Property Revert To Original Project Project Printable View Refresh All

PROJECT SUMMARY

Refresh Related Projects (0) View/Edit Project ▾ Add Property Change Lending Group Service Request SRF Printable View Logs ▾ Email Comments **Create/Edit Portfolio RFP** Service Charge Summary Batch Update

Project Name Testing Portfolio, LLC	Project # 17-000125	Borrower John Doe	Lending Group CRE - Commercial Real Estate	Account Officer Lisa Wilson (AO)	Requester Nicole Westhaver (AO)	Production Administrator PA Non-Applicable	Purpose New Loan
Company # 123	Cost Center 12345	Loan # TBD	Loan Amount \$3,500,000.00	New Money No	Active Yes		

PROPERTY SUMMARY

JOB SUMMARY | P001.01 900 E. Hamilton Ave Campbell CA 95008

TASKS (2)

Refresh Expand All Tasks Collapse All Tasks

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)	12/18/2017	01/29/2018		RFP		\$0.00	\$0.00		Nicole Westhaver (JM)

Refresh Edit Task ▾ Hold Task Link Task Task Attachments (1) **Portfolio Manager**

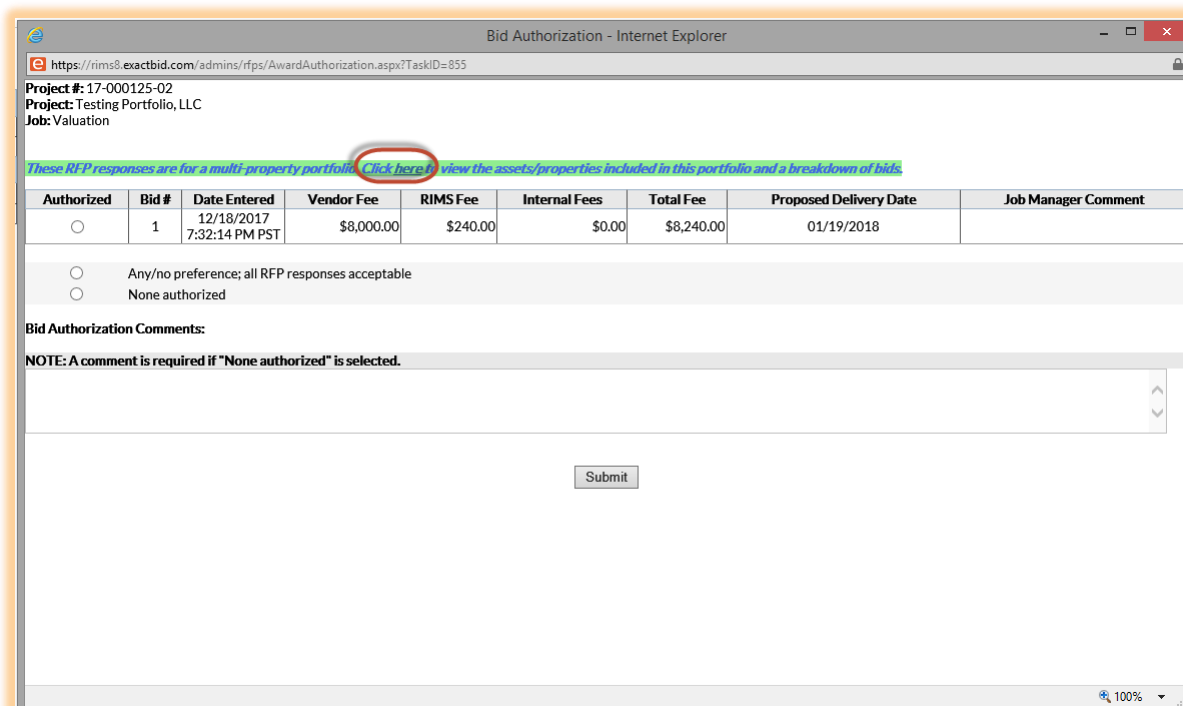
Days Early/Late 0	Payment Processed? No	Handling Fee \$0.00
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Internal	APR_R_TECH	2	(0)	12/18/2017	01/29/2018		Pending Receipt		\$0.00	\$0.00		Nicole Westhaver (JM)
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RIMS Portfolio

How to Authorize a Bid

- The Account Officer will receive an email indicating there are Bid(s) for them to **Authorize**
- The **Fees** displayed to the Account Officer may show a Total Fee or a detailed account of Vendor Fee, Internal Fees, and the RIMS Fee depending on your bank's settings
 - *Please contact Support if you have questions about which fees your Account Officers will see on the Bid Authorization page*
- Account Officers will also have a **Click Here** link to view the **Vendor Fees per Property**



Project #: 17-000125-02
Project: Testing Portfolio, LLC
Job: Valuation

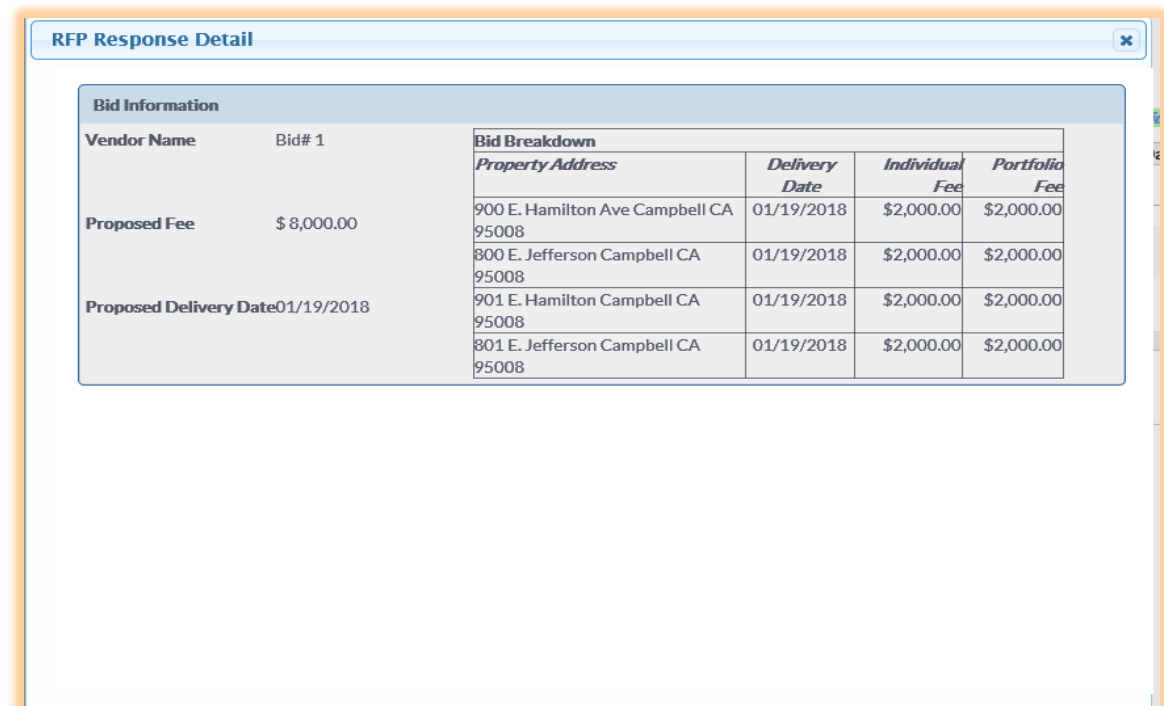
[Click Here](#) view the assets/properties included in this portfolio and a breakdown of bids.

Authorized	Bid #	Date Entered	Vendor Fee	RIMS Fee	Internal Fees	Total Fee	Proposed Delivery Date	Job Manager Comment
<input type="radio"/>	1	12/18/2017 7:32:14 PM PST	\$8,000.00	\$240.00	\$0.00	\$8,240.00	01/19/2018	

☐ Any/no preference; all RFP responses acceptable
☐ None authorized

Bid Authorization Comments:
NOTE: A comment is required if "None authorized" is selected.

Submit



Bid Information		Bid Breakdown			
Vendor Name	Bid#	Property Address	Delivery Date	Individual Fee	Portfolio Fee
Proposed Fee	\$ 8,000.00	900 E. Hamilton Ave Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
		800 E. Jefferson Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
		901 E. Hamilton Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
		801 E. Jefferson Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
Proposed Delivery Date		01/19/2018			

RIMS Portfolio

How to Award a Portfolio to a Vendor and View Engagement Letter

- Once the Authorization has been received, the Job Manager can view the authorized Bid(s) by navigating to the External Task and then clicking **Portfolio Manager**
 - On the Portfolio RFP Manager page, click **Award**.
 - Verify the Fee, Delivery Date, Award Comments and attached files, then click **Award Bid**
- Click **Preview Engagement Letter** to view the PDF, which is also available to the Vendor on RIMSCentral

DOE PORTFOLIO

#	Project Number	Property Address	Property Type	Job Type	Service Office	Task Code	Task Status
1	17-000125-01-1	900 E. Hamilton Ave, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP (Authorized)
1	17-000125-02-1	800 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP (Authorized)
2	17-000125-03-1	901 E. Hamilton, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP (Authorized)
2	17-000125-04-1	801 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP (Authorized)

RFP MANAGER

Approved	Vendor	Office Location	Signature	Date Entered	Prior Service	Award	Rating	Proposed Fee	RIMS Fee	Internal Fees	Total Fee	Proposed Delivery Date
Authorized	Nicole Westhaver (VNA) (EB)	San Jose, CA	Appraiser Name	12/18/2017 7:32:14 PM PST	No	Award		\$8,000.00	\$240.00	\$0.00	\$8,240.00	1/19/2018
	Carol Prohaska (VNA) (ExactBid Inc.)					Direct Award						
	Lisa C. Wilson (VNA) (ExactBid Inc.)					Direct Award						

Send For Authorization

Overall Comments

Save

RFP/AWARD HISTORY

Date	Time	User	Action	Property Address	Project Number
12/18/2017 7:12:25 PM PST		Nicole Westhaver (JM)	RFP created	800 E. Jefferson Campbell, CA 95008	17-000125-02-01
12/18/2017 7:12:25 PM PST		Nicole Westhaver (JM)	RFP created	900 E. Hamilton Ave Campbell, CA 95008	17-000125-01-01

DOE PORTFOLIO

#	Project Number	Property Address	Property Type	Job Type	Service Office	Task Code	Task Status
1	17-000125-01-1	900 E. Hamilton Ave, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP (Authorized)
1	17-000125-02-1	800 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Street Retail	Valuation	Default Service Office	APR	RFP (Authorized)
2	17-000125-03-1	901 E. Hamilton, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP (Authorized)
2	17-000125-04-1	801 E. Jefferson, Campbell, CA 95008	Retail-Commercial - Parking Facility-Surface	Valuation	Default Service Office	APR	RFP (Authorized)

RFP MANAGER

Engagement Letter Template Selection

Portfolio Addendum - Appraisal - Engagement Letter (v.3)
Portfolio Addendum - Appraisal - Engagement Letter (v.3)
Portfolio Addendum - Construction - Engagement Letter (v.3)
Portfolio Addendum - Environmental - Engagement Letter (v.3)

Select None Cancel

Specific Contractual Requirements:

☐ T_SPC_CR_A - Test Specific Contractual Req - Appraisal

Bid Information

Vendor Name	Proposed Fee	Proposed Delivery Date	Signature Information	Office Location	Prior Services	Bid Comments
Nicole Westhaver (VNA)	\$8,000.00	01/19/2018	Appraiser Name	San Jose, CA	No	Thank you for the opportunity

Bid Breakdown

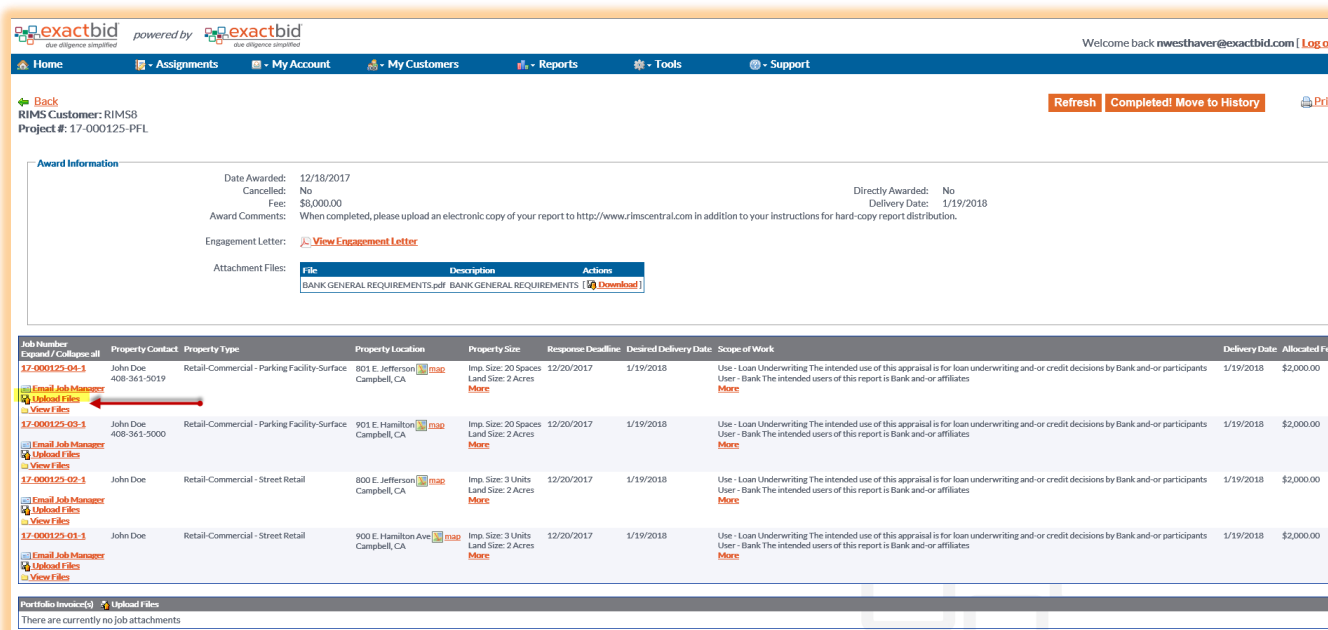
Property Address	Delivery Date	Individual Fee	Portfolio Fee
900 E. Hamilton Ave Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
800 E. Jefferson Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
901 E. Hamilton Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00
801 E. Jefferson Campbell CA 95008	01/19/2018	\$2,000.00	\$2,000.00

Award Bid

RIMS Portfolio

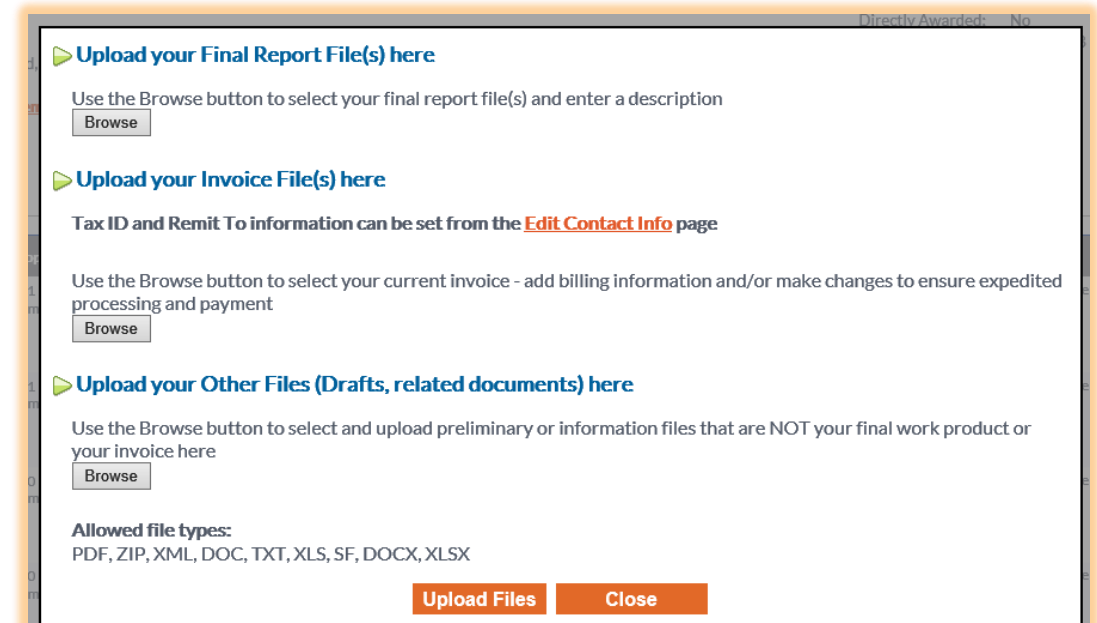
How to View Assignment Info, Upload Reports and Invoice(s) as a Vendor

- After accepting the Award, the Vendor will be able to view the Engagement Letter and Assignment Information
- Upon completion of their Reports, they can upload their Reports and Invoice(s)
 - From the **View Award** page select **Upload Files** and select the Property to which it should be attached
- When uploading an Invoice, it will apply one invoice to the whole Portfolio by default. If you would like to apply individual invoices for each property, uncheck the box that says **This UPLOAD APPLIES to ALL PROPERTIES** and upload an invoice document for each Property



The screenshot shows the exactbid RIMS Portfolio interface. At the top, there's a navigation bar with links like Home, Assignments, My Account, My Customers, Reports, Tools, and Support. Below this, the 'Award Information' section displays details for a specific award, including the date awarded, fee, and engagement letter. A table below lists properties with columns for Job Number, Property Contact, Property Type, Property Location, Property Size, Response Deadline, Desired Delivery Date, Scope of Work, Delivery Date, and Allocated Fee. The table contains four rows of property data.

Job Number	Property Contact	Property Type	Property Location	Property Size	Response Deadline	Desired Delivery Date	Scope of Work	Delivery Date	Allocated Fee
17-000125-04-1	John Doe 408-361-5019	Retail-Commercial - Parking Facility-Surface	801 E. Jefferson Campbell, CA	Imp. Size: 20 Spaces Land Size: 2 Acres	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and/or credit decisions by Bank and/or participants	1/19/2018	\$2,000.00
17-000125-03-1	John Doe 408-361-5000	Retail-Commercial - Parking Facility-Surface	901 E. Hamilton Campbell, CA	Imp. Size: 20 Spaces Land Size: 2 Acres	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and/or credit decisions by Bank and/or participants	1/19/2018	\$2,000.00
17-000125-02-1	John Doe	Retail-Commercial - Street Retail	800 E. Jefferson Campbell, CA	Imp. Size: 3 Units Land Size: 2 Acres	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and/or credit decisions by Bank and/or participants	1/19/2018	\$2,000.00
17-000125-01-1	John Doe	Retail-Commercial - Street Retail	900 E. Hamilton Ave Campbell, CA	Imp. Size: 3 Units Land Size: 2 Acres	12/20/2017	1/19/2018	Use - Loan Underwriting The intended use of this appraisal is for loan underwriting and/or credit decisions by Bank and/or participants	1/19/2018	\$2,000.00



The screenshot shows the exactbid upload interface. It has three main sections: 'Upload your Final Report File(s) here', 'Upload your Invoice File(s) here', and 'Upload your Other Files (Drafts, related documents) here'. Each section includes a 'Browse' button and instructions. At the bottom, there's a section for 'Allowed file types' and two buttons: 'Upload Files' and 'Close'.

Upload your Final Report File(s) here

Use the Browse button to select your final report file(s) and enter a description

Upload your Invoice File(s) here

Tax ID and Remit To information can be set from the [Edit Contact Info](#) page

Use the Browse button to select your current invoice - add billing information and/or make changes to ensure expedited processing and payment

Upload your Other Files (Drafts, related documents) here

Use the Browse button to select and upload preliminary or information files that are NOT your final work product or your invoice here

Allowed file types:
PDF, ZIP, XML, DOC, TXT, XLS, SF, DOCX, XLSX

Upload Files **Close**

How to View Documents and Complete your Portfolio Project

- When the JM receives the Report Uploaded notification, they can proceed with their Workflow as normal, such as:
 - Use **Task Attachments** to View **Vendor Upload**
 - Close **External Task** by entering **Disposition** and **Complete Date**
 - JM could use **Batch Update** for this
 - Complete **Appraisal Summary/Review** and **Review Document**
 - Complete **Scorecard**
 - Complete Internal Task by entering **Disposition** and **Complete Date**
 - *Do not forget to convert the Vendor Upload to APP Report*

Questions

What's Next?

- Next RIMS University Session will cover RIMS Introduction: Workflow Part 1 on **Tuesday, January 23rd at 4pm EDT** (*Invite coming soon*)
- If you have a suggestion for a future training topic email adanes@exactbid.com
- Have additional questions about Reporting? Email us at support@exactbid.com



Thank You