1400 Cherrington Parkway, Moon PA 15108

EXOS Client Service User Guide

8/1/2021

1400 Cherrington Parkway, Moon PA 15108

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ORDER SEARCH

The search options are displayed in the top right corner of EXOS. They should display regardless of which screen or section a user is currently working.

A user has two options in which to search or locate an order:

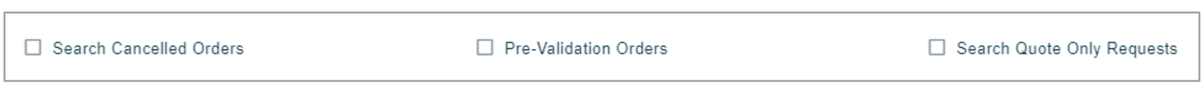
- Search (basic search)
- Advanced Search

The Basic Search allows the user to search by the Order ID, Loan Number, or Work Order ID.

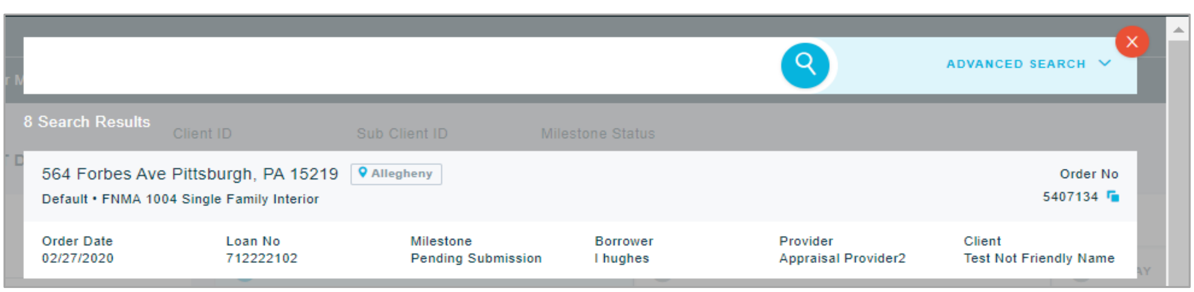
The Advanced Search provides additional data fields for the user to locate an order or group of orders.

- EXOS Bulk ID
- Work Order ID
- Quote ID
- Loan Number
- Street Address
- State
- County (pick ST first)
- City
- Zip Code
- Client ID
- Client
- Provider ID
- Assigned Provider
- Milestone
- Product
- Product Category
- Bulk Name
- Bulk Start Date
- Bulk End Date

During a standard order search, the system will display open or completed orders. There are additional checkboxes within the Advanced Search that allow the user to include cancelled orders, orders pending exception, or quote only requests within the search results.



The system will display all orders that match or have a partial match to the data searched. The user can click on the details of the order to open it within the browser.



Tip: If the user selects the wrong order or wants to open another order, a new search will be needed.

ORDER INFORMATION

System Views

Currently in EXOS, there are two views that a user will encounter and will have the ability to switch between at any point on the order.

- Client Service View
- Vendor Operations View

The two views are similar in appearance and have some shared functions. They also offer additional functions to the user that are not available in the other view.

A user can switch between views by clicking on the dashboards or one of the links below in an order.

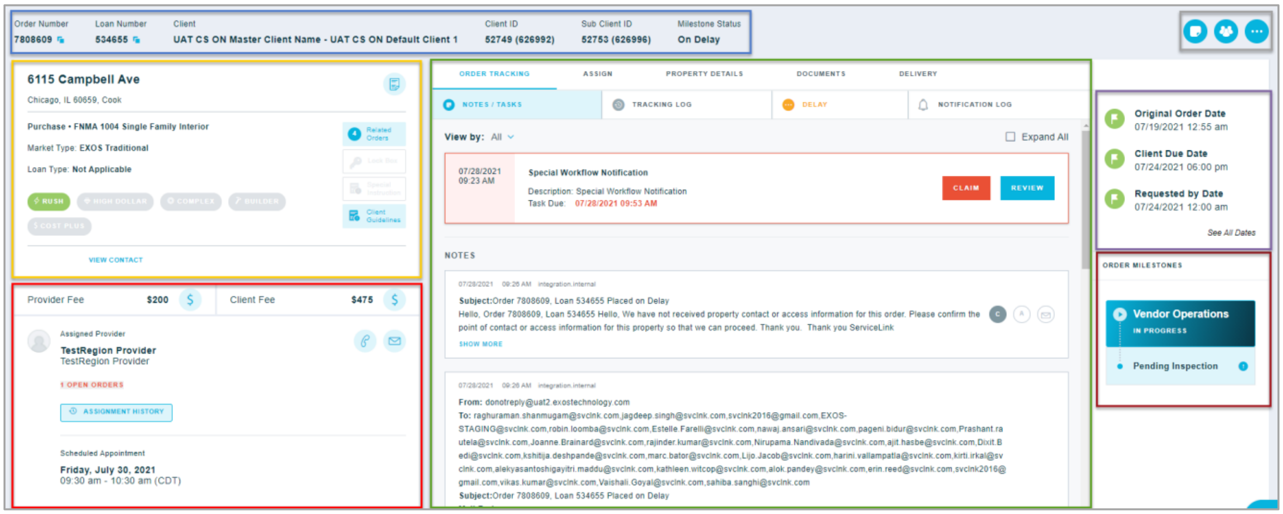
View	Additional Functions*	Switch Views
Client Service	• Client Service tasks and escalations • Edit order information • Edit client fees • Enter a Client Request • Place a Critical Escalation notification • Single and Bulk order creation • Prepay processing	• Order Number • Schedule tab • Assign tab • Request Trip Fee • Dashboard tabs
Vendor Operations	• Scheduling • Vendor selection • Appointment updates • Inspection complete • Upload report • Send LOE • Undue Influence	• Order Number • Dashboard tabs

*Some of the functionalities will vary based on user role and permissions.

A client service user's primary view will be the Client Service View, however a user within the Vendor Operations View will need to click on one of the designated links to switch back to the Client Service View.

Order Details

The main screen displays the basic and most used information of an order. It is broken into several primary sections.



Order Basics

Displays:

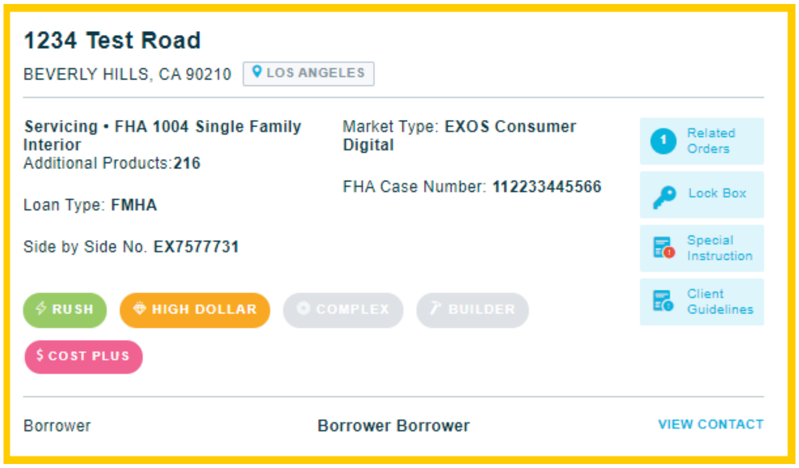
- Order Number
- Loan Number
- Client Name
- Client IDs
- Order Status
- Alerts

Tip: Clicking on the client name while in the Client Service View will take the user to the client profile.

Alerts: Indicators of special orders requiring additional attention.

- **New**: Indicates a client that is designated as New Business.
- **Escalation**: Indicates a client escalation triggered by Client Service.

Address Card



Displays:

- Property Address
- Transaction Type
- Product Type
- Market Type
- Loan Type
- Assignment Information
- Related Orders
- Lockbox Details
- Special Instructions
- Client Guidelines
- Borrower/Property Contacts
- Side by side order (if needed)

Assignment Indicators: Only highlights when triggered by specific order details.

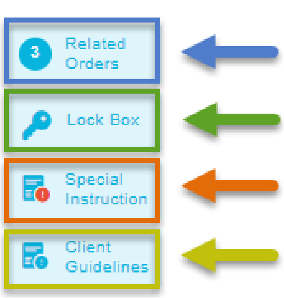
Rush: Order indicated as a rush at order placement or triggered by a quick need by or requested by due date.

High Dollar: Triggered when the estimated loan value exceeds the threshold set within the client profile.

Complex: Triggered when Collateral Analytics complexity score exceeds the threshold set within the client profile.

Builder: Triggered when the property is designated as 'New Construction;' may or may not follow Builder Program depending on client configuration.

Cost Plus: Identifies if the client fee is configured to charge the client a certain amount above the vendor fee.



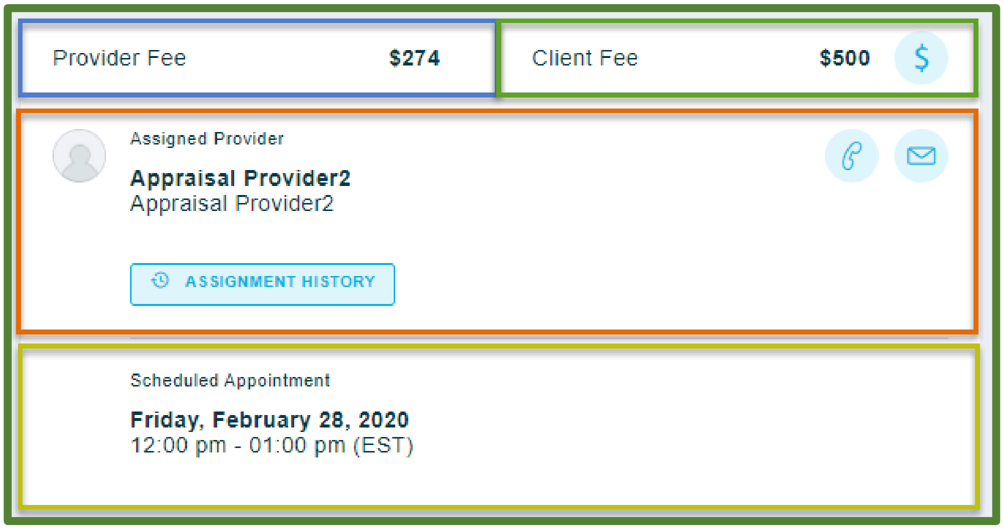
Displays orders related to current order

View or edit Lockbox code for access

View or edit client order instructions

Client preference cheat sheet, data stored within client profile

Provider Card



Provider Fee: Adjustable by Vendor Operations.

Client Fee: Adjustable by Client Service, additionally displays prepay information when applicable.

Provider Information: Displays vendor name, contact information, and assignment history.

Displays the provider's phone numbers, also links to Click to Dial

Opens popup to send an email to the provider

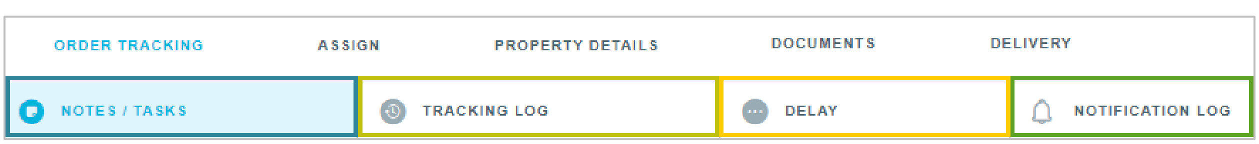
Appointment Information: Displays current appointment, appointment history (if applicable), and resend scheduling link (if applicable).

The provider card is located on the left-hand side below the address card.

Tasks and Details

Order Tracking

Order Tracking contains subtabs of additional functions.



Tasks: Displays all tasks pending review and completion, including both Client Service and Vendor Operations tasks.

- The ability to complete a task will depend on user permissions.

Notes: Displays all internal, vendor, and client viewable notes.

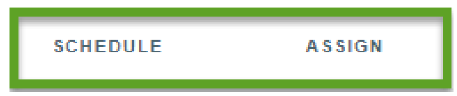
Tracking Log: Displays all order events, milestones, and tasks.

Delay: Provides the functions to add and manage open delays and view previous order delays.

Notification Log: Displays and allows for resending of failed client notifications.

Schedule/Assign

Both the Schedule and Assign tabs switch the user to the Vendor Operations View to schedule the inspection and/or assign the order to a provider.

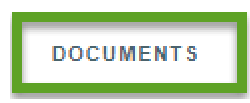


Property Details

The Property Details tab displays information on the subject property that is either pulled from Collateral Analytics data or manually entered by vendor operations, client service, or borrower. Some of the information is editable by a user after order creation.

Documents

The Documents tab allows the user to add new, search, view, and send order documents.

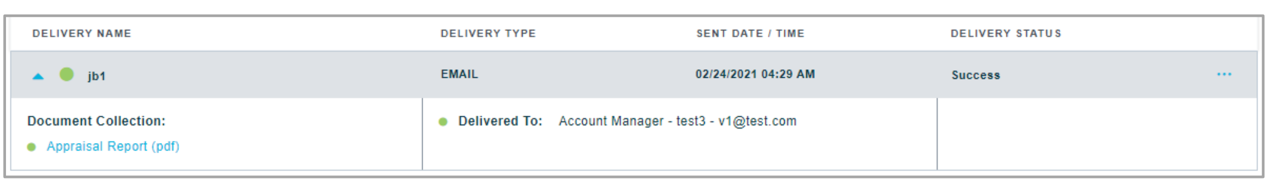


Tip: Document file size is limited to 6 MB.

Delivery

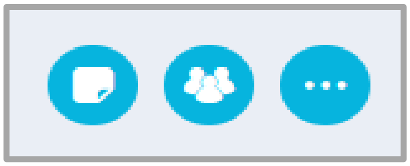
The Delivery tab displays the status of all report and document delivery to the client.

A user will be able to update and re-fire any failed or successful report delivery.



DELIVERY NAME	DELIVERY TYPE	SENT DATE / TIME	DELIVERY STATUS
jb1	EMAIL	02/24/2021 04:29 AM	Success
Document Collection: Appraisal Report (pdf)	Delivered To: Account Manager - test3 - v1@test.com		

Action Icons



Add Note: Add internal or client notes, email client
Property Contacts: Add or edit order contacts
Actions: Actions available to be done on an order (varies with type of order and status)

Actions (Live Orders)

Edit Order: Allows changes to order details

Cross Module Task: Sends a notification to another team

Client Request: Creates a task and provides tracking of client requests

Add to Bulk: Add an individual order to a bulk

Integrations Events: Displays and allows resending of integration events when applicable

Integrations Data: Displays integration reference data when applicable (view only)

Critical Escalation/De-Escalation: Flags the order with the Escalation alert or removes alert

Alternate Inspection Type: Trigger alternate inspection workflow (ex. Exterior with Interior photos)

Send LOE: Resends LOE to vendor

Request Trip Fee: Create a trip fee for vendor

Post Delivery Request: Creates a task for Quality Control to review a revision request from the client

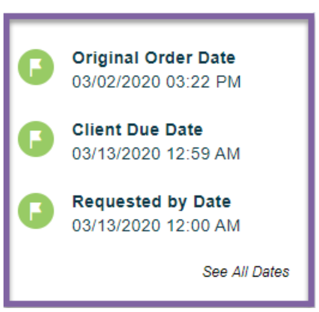
Actions (Quote Orders)

Cancel Quote: Cancels the quote request order

Convert to Order: Converts the quote only order into a live order

Reorder Quote: Allows client to get a new quote on a property if the quote has expired

Order Dates



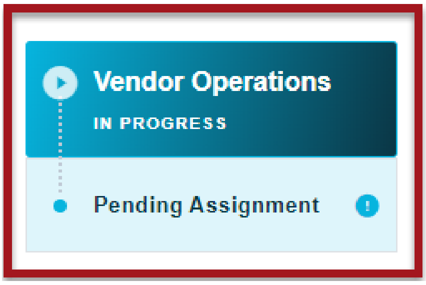
Displays:

- Original Order Date
- Order Start Date
- Provider due date
- Client Due Date
- Requested by Date
- Close Date
- Contingency Date
- AP Due Date
- NSD Date

*Dates only display when applicable

At the bottom right corner of the order dates section, the user can expand to see more or less dates by clicking on “See All Dates” or “See Less.”

Milestones



Displays:

- Current Milestone
- Completed Milestone(s)

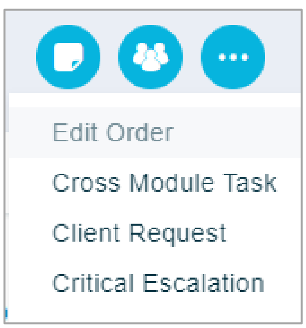
A user has the option to expand the section to see prior milestones or collapse to see less.

Tip: Milestones are not the same as Status and may differ.

ORDER EDITING

EXOS provides several sections in which order information can be edited by the client service user. Each section updates specific order details.

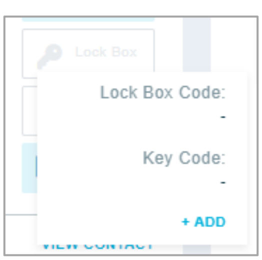
Edit Order Action



Location:	Updates:
• Actions → Edit Order	• Client • Property Information • Product Information • Loan Information • Client Due Dates • Access/Contact Information • Special Instructions • Documents • Cancel Order

Tip: When removing the Rush from an order, both the Rush box must be unchecked/No and the Requested by date cleared.

Lock Box



Location:	Updates:
• Address Card • Actions → Edit Order	• Lockbox • Key Code Information • LOE

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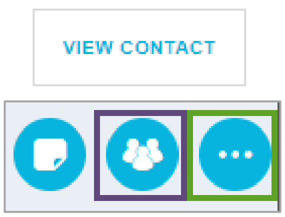
Special Instructions

Location:	Updates:
• Address Card • Actions → Edit Order	• Order Instructions • LOE

Tip: Special instructions can be updated through the Special Instructions box or Edit Order screen.

Order Contacts



Location:	Updates:
• Address Card • Action → Contacts • Action → Edit Order	• Property Contact Information • LOE

Tip: When adding a new contact through View Contact or the Contacts button, at least one phone number or email must be entered or the contact will list as an Invalid Contact.

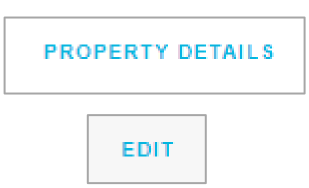
Tip: When adding a new contact through Edit Order, both a phone number and email is required if the contact is indicated as primary.

Client Fee

Location:	Updates:
• Provider Card	• Client Fee • Payment Method (Prepay)

The Client Fee section also contains the prepay functionality and ability to change the payment method of an order from prepay to direct bill.

Property Details



Location:	Updates:
• Property Details tab	• Structure • Interior • Updates

Only the sections with 'Edit' options can be updated. Updated items will be designated with a 'Revised' indicator.

Documents

Location:	Updates:
• Documents tab • Actions → Edit Order	• Order documents

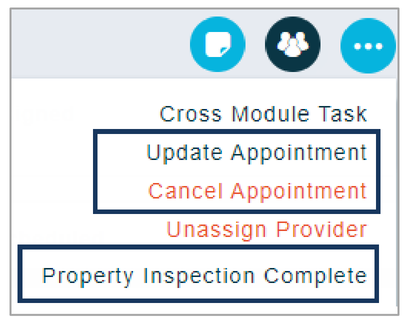
A user can designate a new or current document as client or provider viewable, email the document, or download the document from this section.

Appointment Update

Client service can add or update an inspection appointment date through the Vendor Operations View.

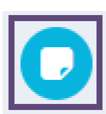
Using the Vendor Operations Actions button, a user will have access to additional actions that update the vendor appointment.

- Update Appointment
- Cancel Appointment
- Property Inspection Complete



ORDER NOTES

The order notes can be viewed under the Order Tracking → Notes/Tasks section of EXOS. If there are any tasks pending on the order, the notes will display below the task list.



To add a note, a user will click on the Add Note actions icon.

Within the Add Notes popup box, a user can enter an internal note, client note, set a follow up action, and email the client.

Tip: Templates are available for both internal and client notes and will vary depending on the status of the order. The templates can be edited to provide a more specific message to the client.

An internal note can be flagged for the provider or quality control by selecting the appropriate indicator option.

Tip: An internal note is required at all times. If a client note is needed, the user must also enter an internal note in order for the note to save.

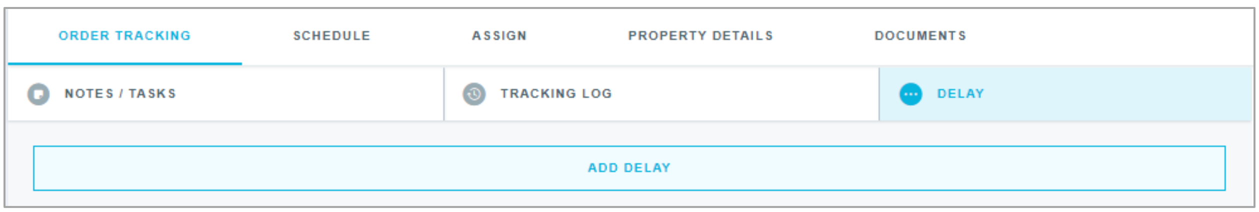
A specific subject line can be manually typed or selected from the drop down to accompany the client note. The subject line dropdown menu will provide both the client and enterprise subject line options.

The client note can additionally be emailed to a client contact or a manually typed recipient.

Tip: The subject line and email body must be entered in the main note screen prior to selecting a recipient. To edit the email subject and body, the user can hit 'Back' to return to the note screen.

ORDER DELAY

Both Client Service and Vendor Operations users can place an order on delay through the Delay subtab under Order Tracking.



Only one delay can be added to an order at a time. If a change or new delay is needed, a user can either edit the existing delay or will need to resume the current delay and place a new one.

All delay history will show under the Delay subtab.

Adding a Delay

When placing a delay, the user will need to select an option from both the Broad Category and the Sub Category drop downs.

The Delay Card contains six Broad Categories:

- Property Access
- Incomplete Order
- Client Approval Needed
- Documents
- Client Requested
- Internal Tracking

The delay option that popuates within the Sub Category dropdown is directly dependent on the Broad Category that is selected by the user.

Example: *A purchase order is received from the client and is missing a purchase contract. The user would select 'Documents' as the Broad Category and 'Missing Purchase Contract' as the Sub Category.*

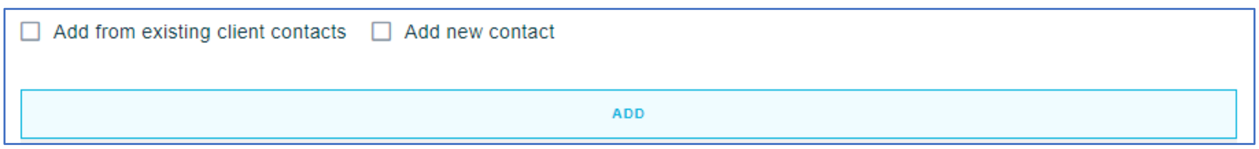
Delay Notes

A user is required to enter a client viewable note when placing a delay and will have the option to enter an internal and/or vendor note if needed.

Tip: Depending on the delay settings within the client profile, a pre-populated message may automatically display within the Client or Vendor note fields. The user can edit this information before submitting the delay.

The client note can additionally be indicated as Action Required for certain integrations by checking the Client Action Required option.

A user will have the ability to add an email recipient from a drop down linked to the client profile and order contacts or manually enter a recipient to receive the Client note if needed on an order.

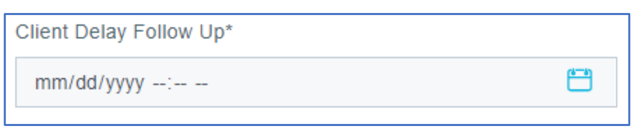


Note: Some clients may already be configured to receive emails on client delays if configured to receive an email on all client viewable notes or through the client communication template settings. Please refer to client process guidelines if this is needed.

The client will be notified once the delay has been added, via email, website, or their prefered delivery method if the client is integrated.

Client Delay Follow Up

All delays will automatically populate a 2 business day follow up, but the user has the ability to manually change the date and time of the follow up as needed.



Once the follow up date and time expires, the delay will fall into Get Next as a Delay Review Task.

Within the Delay Card, the user has the option to:

Edit: Allows changes to the delay
Resume: Removes the delay
Resend Delay: Resends delay notification to client
Follow Up: Allows updates to the client notification and next follow up date

All follow up changes will show within the Follow Up history.

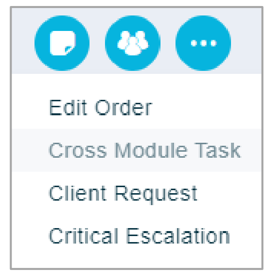
NOTIFICATION LOG

The Notification Log will display any client notification that failed to deliver to the target (ex. a bad email address).

A user will have the ability to edit the recipients and/or resend a notification.

Note: If a client notification requires a specific contact that is not provided on the order, the notification will not send at all or display as a failed notification.

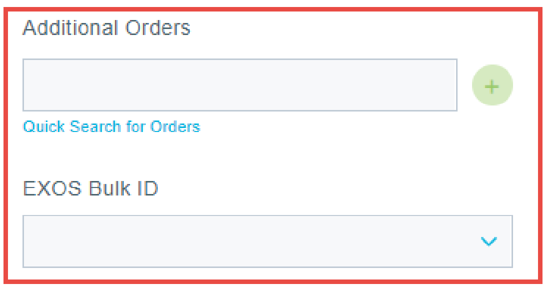
CROSS MODULE TASK (Not Available for Initial Release)



The Cross Module Task allows for direct communication between the Client Service and Vendor Operations teams.

Under the Actions icon, the user selects Cross Module Task.

The user is required to enter an internal note for the notification but has the options to enter a client viewable note or attach a document if needed.

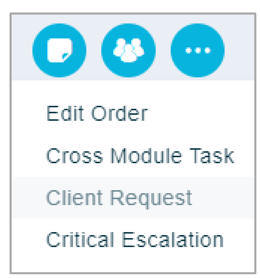


Tip: Within the popup screen, the user can add additional orders or a bulk ID for the recipient to reference.

However, a user can only select to add additional orders or a bulk ID, both cannot be added to the same task.

Once submitted, a task is created for the intended team to review. The internal and client viewable notes will additionally post into the order notes.

CLIENT REQUEST

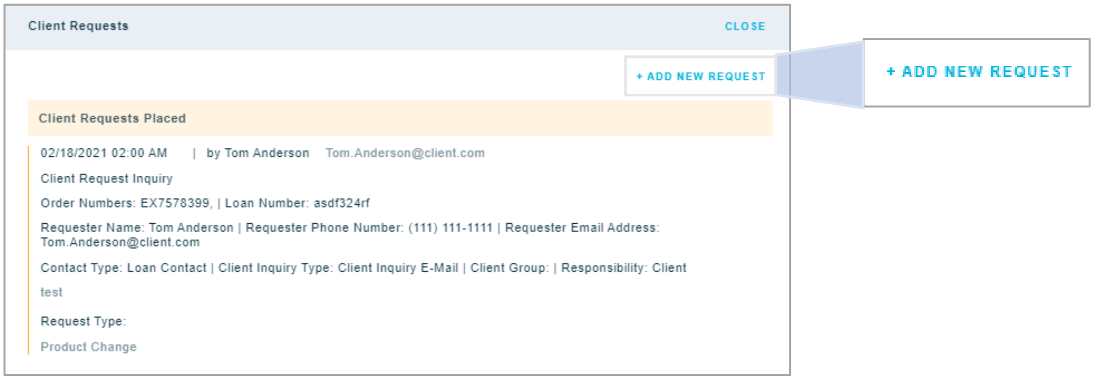


The client can place a special request or communication on the order through the client website using the Client Request option.

Client service also can add a request for the client when received via phone or email.

Under the Actions icon, the user selects Client Request.

The initial popup screen will display any current and prior client requests on the order and the option to add a new request.

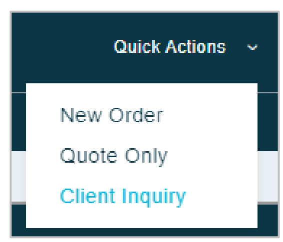


When adding a new request, majority of the fields will auto-populate, however the request type and request details must be entered by the user.

Tip: The requestor data fields will autofill with the details of the user adding the request, however, they can be edited and updated with the client's information.

A client request placed by the client will create a Client Request Task and will route through Get Next. A client request placed by an internal user will only generate a Client Request Task if a follow up date is selected by the user when created.

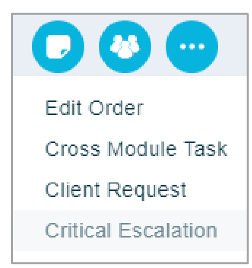
Client Inquiry



Under 'Quick Actions,' an internal user can track a client inquiry/request that does not correlate to a specific order.

The inquiry posts to the client's profile and does not create a task for follow up or resolution. The user will need to manually track the inquiry if follow up with the client is needed.

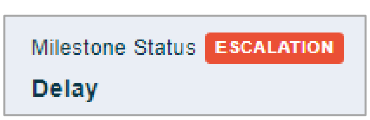
CRITICAL ESCALATION



A client service user can designate an order as escalated.

Under the Actions icon, a user selects Critical Escalation.

The user must enter an internal note at the time of escalation and has the option to enter a client viewable note as well.



The order will display an Escalation indicator at the top of the order details, next to the Milestone Status.

A client service user can remove the escalation from the order. Once an escalation is placed on an order, the Critical Escalation option under the Actions icon changes to Critical De-escalate.

REQUEST TRIP FEE

A client service user can submit a trip fee request for a vendor. When a client service user submits the request, it will autocomplete and charge the client if a client fee is provided.

Tip: If the request first needs approval from the client, the original product should be placed on delay for approval. Once approved, then a trip fee request can be created by a client service user.

If a vendor operations user submits a trip fee request to charge the client, it will create a review task for client service prior to sending to the client.

A client service user can override the client fee both on a new request and review task.

Merge

For integrated clients that send a new trip fee order once approved, the order will stop with a duplicate exception task.

MERGE

The user will have the action option to merge the new trip fee order with the original request.

After taking the Merge action, the user can select the original trip fee to merge with the new order from the options provided by the task or search an order manually if needed.

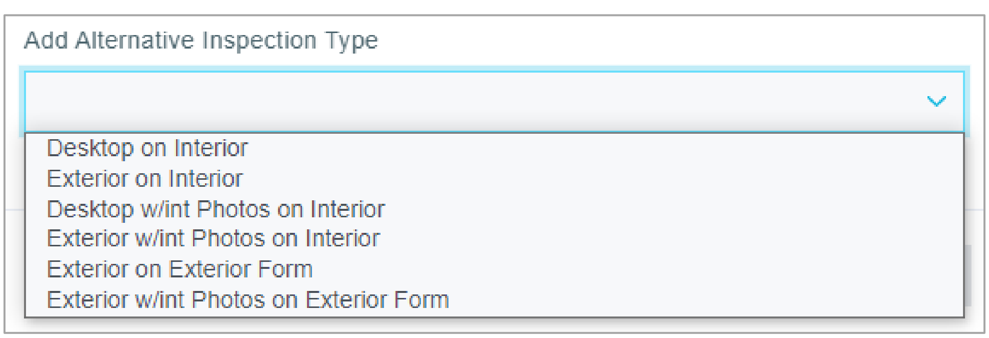
Merge Duplicate Trip Fee Work Order

ORDER NO.	LOAN NO.	ORIGINAL ORDER DATE.	PRODUCT
◯ EX7577732	Loan Number1	02/16/2021 04:08 PM	Trip Charge

The two trip fee requests will merge into one order so the provider is only paid and the client charged one fee.

ALTERNATIVE INSPECTION TYPE

Using the Alternative Inspection Type action, a client service user can trigger one of the special inspection workflows when needed.



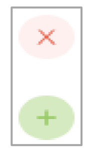
The workflow selected will trigger a new LOE and order instructions, a designation on the order for the alternative inspection type, and special quality control rules.

POST DELIVERY REQUEST

This action is available for a client on the website or client service user to enter a postdelivery revision request on an order. This action triggers a task for quality control to review and decide if the report needs to be rejected to the provider.

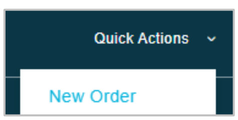
Each revision request item from the client should be entered individually as its own line item so QC can select which revisions are needed during review.

Tip: Use the + icon to add the item to the revision list. If the icon is not selected, the item will not be included. A line item can be removed by using the X icon.



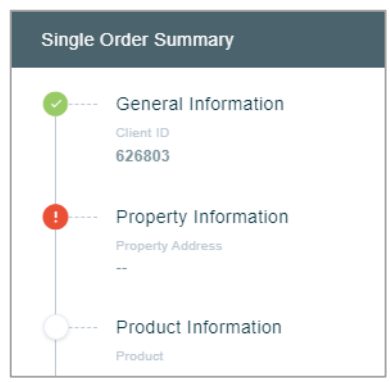
SINGLE ORDER CREATION

A client service user can create new individual orders with EXOS.



Using the New Order option under 'Quick Actions,' the user has the option to place a Single Order.

The user is presented with the order creation screen which guides the user to enter in the required order information.



Tip: The user should fill out the information in the order presented, as some fields are dependent on prior fields' data.

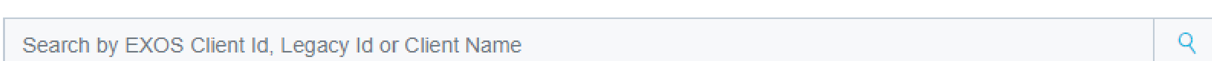
As the user fills out the order details, the Summary screen on the left-hand side updates to indicate which sections have all required fields completed, are in progress, and are not yet started.

To create a single order:

- Fill out the required information fields (indicated with *) for each section
- Additional fields or documents can also be entered

Order Entry Tips

Client Selection: Enter the EXOS Client ID, Legacy ID, or client name (partial or whole) into the search bar to easily identify the client needed.

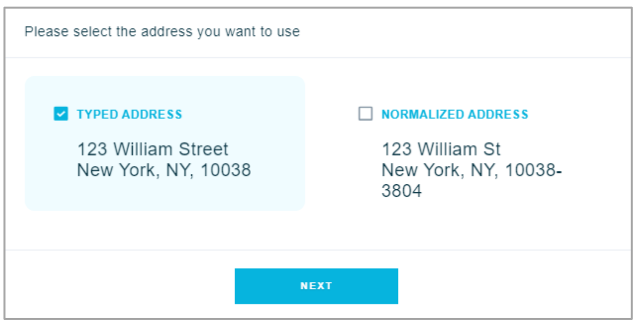


If the search results in an exact match, the client account details will autofill with the profile information.

If there are multiple or partial matches, EXOS will provide the possible client options within the search results. The client can be selected from the results and the client data will autofill into the new order screen.

Address Validation: As a user types in the order address, the system will attempt to find potential matches which will be displayed in a drop down. The user can select an address from the drop down or continue to enter the address manually.

Once the street address is entered, the zip code, county, state, and city should autofill, however, may need to be manually entered if the address is not recognized by the system.



After the address is fully entered, the user will receive a popup screen to verify if the typed address should be used or the normalized address.

If the user chooses to use the Normalized address, the Normalized box will automatically check under the address on the order screen.

Rush Indicator: During order creation, a user can indicate the new order as a rush.

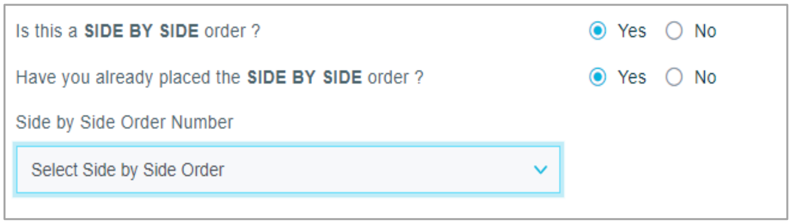
Appraisal products will only provide the option to designate the order as a rush or no rush.

Broker products will additionally allow the user to designate the rush as 24, 48, or 72 hour.

The Rush option will only be available if the client profile is set to allow rushes. Otherwise, the option to designate a rush will not be available.

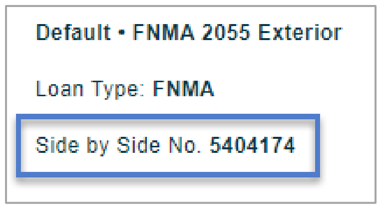
Side by Side Indicator: A user has the option to create and designate one or more orders as side by side orders.

If the user selects 'Yes' to the side by side option, additional options will appear to confirm if the order is the first or second side by side order.



If the order is the second side by side order, the user can use the drop down to locate the original side by side order or proceed without selecting the first order.

The address cards on both orders will display the side by side indicator and provide the other order number.



Contact Information: At least one borrower must be added at order entry to create the order.

A phone number or email for the contact is not required unless the contact is designated as the Primary Contact.

If the user marks the Primary Contact box, both a phone number and email will be required to save the contact.

A user has the option to add multiple phone numbers or email address and indicate the contact's methods as preferred.

QUOTE ONLY CREATION

A client service user can create a quote only request under 'Quick Actions.' The quote only creation screen will be similar to the Single Order creation screen, but only allows for required information to be entered.

Contact Information: At least one loan contact must be added at order entry to create the quote only order. Both a phone number and email are required so that the quote notification can be delivered.

A borrower is an optional contact but will be required if the quote is converted to a live order.

Once the quote is created, EXOS will provide the Quote ID not a Work Order ID.

Tip: A user will need to search using the Quote ID field and check the "Search Quote Only Requests" box on the search screen to locate quote requests.

Quote Conversion

Once a quote is provided to the client, the client or client service user has three options to finish the process.

- **Cancel Quote**: Closes delays and tasks and cancels the quote only order
- **Convert to Order**: Converts the quote order into a live order to be completed
- **Reorder Quote**: Only available after the quote expires, reopens the order for a new quote

When a user selects Convert to Order, it will present a new order form to fill out. The information that was provided on the quote order will automatically populate onto the new form.

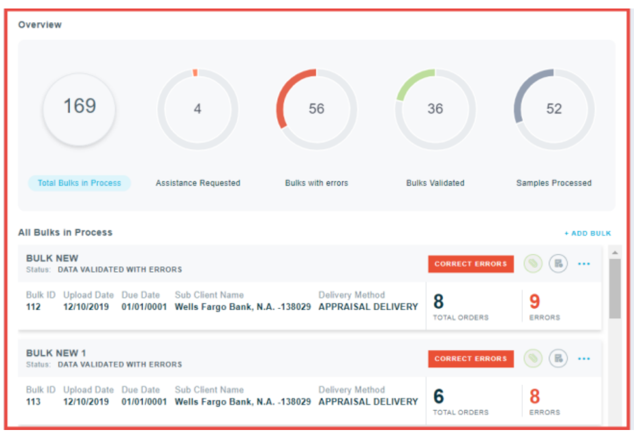
Any additional required information must be added before the form can be submitted (ie. borrower or contact information) if it was not provided during the original creation of the quote order.

BULK ORDER CREATION

Dashboard

The Bulk Order dashboard is split into two halves and provides information on two types of bulks:

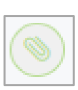
- Processing Bulks
- Active and Completed Bulks



The top graphs provide an overview of the bulks within each status. They can be clicked on to change the data and bulks displayed in the bottom section.

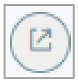
The bottom portions of the dashboard provide data on individual bulks.

For each bulk, a user has the options to:

 Download and open the original bulk spreadsheet

View special instructions

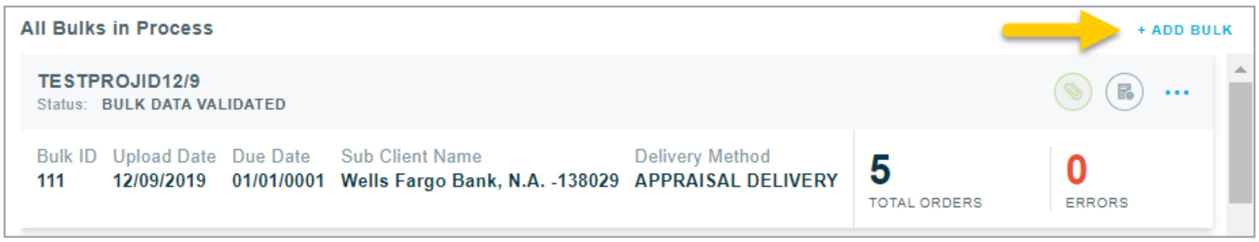
Cancel the bulk in progress or view client assistance escalations



Open the bulk orders in the pipeline dashboard (Active/Completed)

Add a Bulk

Selecting the Add Bulk option, a user can upload a new bulk order.



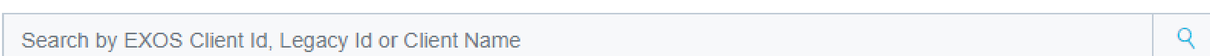
The user must fill out the required data fields within the bulk screen and upload the prepared bulk spreadsheet in order to submit the bulk for processing.

If the user has not yet prepared the bulk spreadsheet, the template can be downloaded from the Upload popup screen.

Once the template is filled out with the client's data, the bulk spreadsheet can be uploaded to the documents section.

Bulk Order Upload Tips

Client Selection: Enter the EXOS Client ID, Legacy ID, or client name (partial or whole) into the search bar to easily identify the client needed.



One client bulk: When placing a bulk with one client for all orders, use the subclient name or ID to select the client to apply to all orders. If only one client is used, the subclient ID on the template does not need to be filled out.

Multi-client bulk: When placing a bulk with more than one client, use the master or parent client name or ID when searching. All orders on the template must contain a subclient ID and must be a subclient under the master client selected.

Note: All orders for a subclient that is not under the selected master client will need to be placed separately in another bulk template and upload.

Client Contact: A user has the option to select a contact listing within the master or subclient profile of the client selected, add additional contact(s) manually, or add contacts to each order within the spreadsheet.

If a contact is added to the bulk upload screen, the contact will be added to all orders within the bulk.

Bulk Details: The user can manually enter bulk specific preferences for each bulk upload, such as:

- Client Bulk Name
- Project ID
- Delivery Method
- Due Date

Delivery Method: All bulk delivery options set up in the client profile will display for selection. A delivery method is required for appraisal, broker, and desktop bulks. Bulks for AVM products do not require a delivery method.

Note: Only one delivery method can be select for each bulk. Bulks with multiple product groups or multiple clients that have different delivery methods must be separated into another bulk for each delivery method needed.

Special Instructions: Special instructions can be entered within the bulk spreadsheet for each individual order or within the Special Instructions text box within the upload screen.

Information entered into the special instructions field will display in every order within the bulk.

Template Tips:

- Common characters such as &, -, #, and / with address may cause errors during upload.
- Convert zip codes starting with zero to text to avoid dropping the leading zeroes.
- The **first and last** name of at least one borrower is required for all orders.
- The following columns are required for upload (non-AVM), all others are optional:
  - Loan number
  - Address, City, State, Zip code
  - Borrower last name
  - Product name
  - Transaction type
  - Property type
  - Client contact name, phone, and email

Error Correction

After upload, every bulk spreadsheet runs through a validation phase to ensure all required data is provided and within the correct format.

If any errors are found, the bulk details will advise that corrections are needed and how many errors were found within the spreadsheet.

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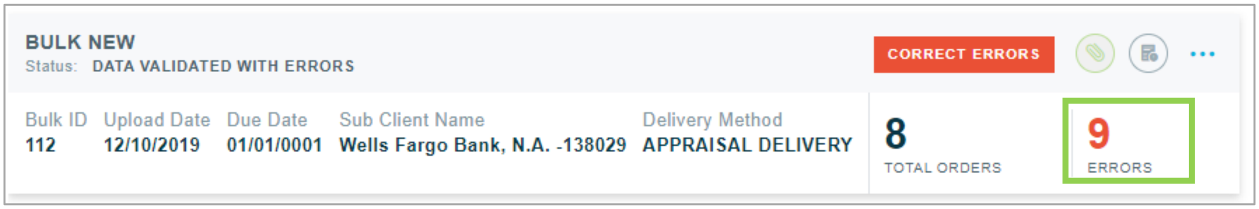
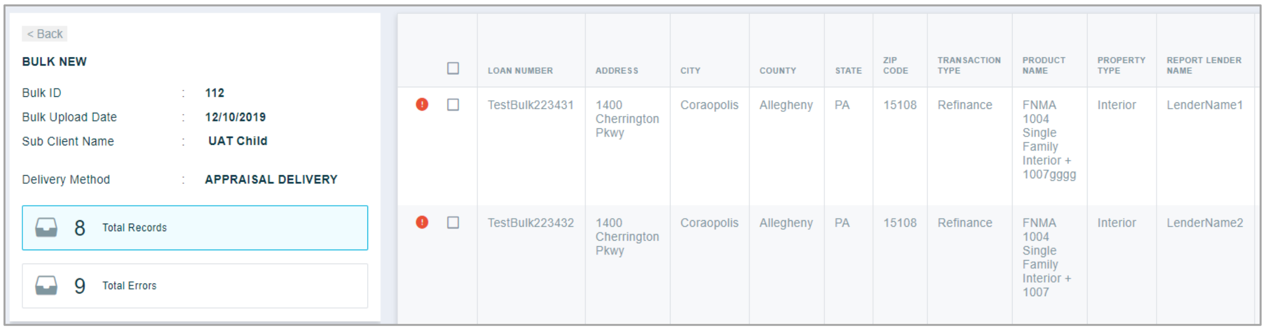
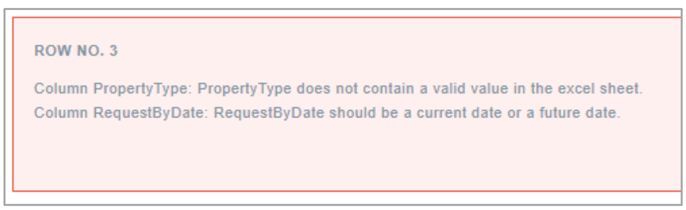


Clicking on the 'Correct Errors' indicator will open up the correction screen.

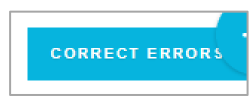


Rows with errors will be indicated with the icon.

Clicking on the row's checkbox will display the location of the errors within the row.



In order to correct the errors, the user must click on the 'Total Errors' box, then the 'Correct Errors' button in the bottom right corner.



Within the correction screen, the errors will be designated with the error icon. Once the error(s) is corrected, the user can click 'Save and Continue' button to move the next order with an error.

Tip: The 'Correct Errors' button will only pull the details for the rows selected in the correction screen. Clicking on the checkbox above the rows will highlight all rows and will allow the user to update all errors without exiting the correction popup screen.

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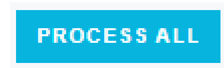
Processing Bulks

Once all errors are corrected, the user must process the bulk either by selecting 'Process Sample' (only available for bulks over 10 orders) or 'Process All.'



When the bulk is finished processing, it will move to the Active Bulks section of the dashboard.

Tip: 'Process Sample' will only create 10 orders from the bulk. Once created, a user will need to select 'Process All' to create the remaining orders.

AVM PROCESSING

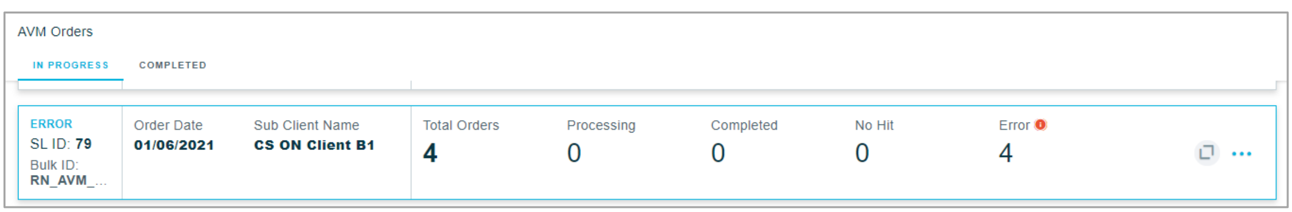
AVMs can be created using the New Order (single order) or Bulk Upload processes.

When using the Bulk Upload process, the user must check the AVM Bulk checkbox and only the fields below are required for upload:

- Subclient ID
- Address
- Product Name

AVM Processing Dashboard

AVMs that are in progress or completed will display on the AVM Processing dashboard instead of the Bulk Processing dashboard. The dashboard will display all AVM bulks for all clients and teams.



 Expand for details on each property or Collapse

 Restart (In progress orders) or Download spreadsheet (Completed)

A user can download the results for an entire bulk of AVMs using the action button on the completed tab.

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ORDER EXCEPTION PROCESSING

As a new order processes, it can fail one or more rules and trigger an Order Exception Task and alert client service that there is an issue with the order.

All Order Exceptions Tasks provide the user with the options:

- Task Follow Up
- Escalate/De-escalate the task (De-escalate based on permissions)
- Add a Delay
- Edit Order

There are several Order Exceptions that can trigger and each have its own options to resolve the task.

Attribute	Trigger	Resolution(s)
Duplicate	A prior open or completed order was found on the same property within the client's duplicate timeframe	1. Select option to Proceed 2. Place order on delay 3. Cancel the order
Missing Client Fee/Form Fee	No fee is set up within the fee tier for the product	1. Add a client fee to the order 2. Add a product fee to the client's fee tier (special permissions required)
Invalid Address	The address is not validating against database information	1. Update the address 2. Under Edit Order, choose to accept typed address
Address Missing	No address was entered at creation	1. Add an address
County Missing	No county was entered at creation	1. Add a county
Zip Code Missing	No zip code was entered at creation	1. Add a zip code
Borrower Last Name Missing	No borrower name was entered at creation	1. Add the name or N/A to borrower last name

Loan Number Missing	No loan number was entered at creation	1. Add the loan number or generic loan number
Missing Product/Form	The product ordered is not set up within the client profile	2. Change product 3. Add product to client profile (special permissions or ticket required)
Ineligible Product	The product is not allowed to be ordered	1. Change product 2. Cancel the order
Client ID Missing	Order was placed without a valid client entered	1. Add the client ID
Inactive Client	The client selected does not have an active client account	1. Update the client ID to an active client 2. Update client profile to Active (ticket required)
Special Instructions Review	Keyword search of special instructions, if keyword is found, a task creates for review	1. Edit the instructions 2. Close the task with a note
Hardstop	Triggered by data mapping configuration to stop orders with various exception scenarios (ie. no coverage, stop for review)	Depends on reason for hardstop: 1. Change product 2. Change client 3. Cancel the order
Prepay Processing	Prepay order requires payment	See Prepay Processing

Multiple exceptions can trigger and display as attributes on the same Order Exception task at the same time. The system will typically provide options to resolve one exception at a time.

Some task actions may resolve multiple exceptions at the same time depending on the exceptions pending.

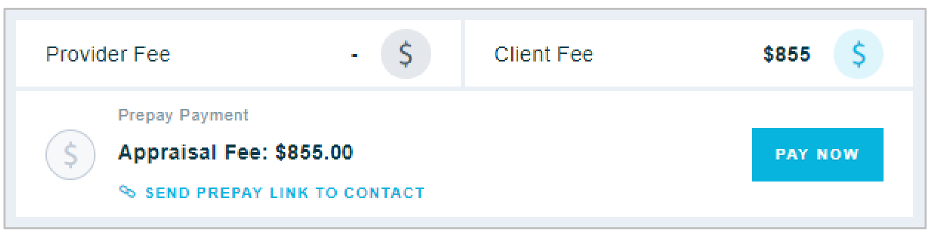
Example: *A product change may resolve an Order Exception for missing client fee and missing product.*

Several order exceptions will create tasks for AppSupport (helpdesk) to work and update. The AppSupport team may reach out to client services for assistance to resolve.

Exception	Trigger	Resolution(s)
Invalid Client	Client ID attempted to be ordered is not configured or mapped (integrations)	1. Update client mapping 2. Change client 3. Cancel order
Invalid Product	Product mapping is missing in EXOS (integrations)	1. Update product mapping 2. Change product 3. Cancel order
Order Update Fail	An update to the order failed	1. IT identifies resolution

PREPAY PROCESSING

Prepay orders will be designated by an additional payment section below the provider and client fees. Within this section, a user will be able to see when the payment link was last sent and have the option to resend the payment link.



The prepay process is dependent on the client profile configuration. There are four configuration options within the client profile:

- **Always Prepay:** Follows an automated process that will automatically send a payment link to the prepay contact(s) on all orders.
- **Sometimes Prepay:** Follows a partially automated process in which a task will generate for the user to determine if a payment link should be sent the contact or direct billed.
- **External Prepay:** Payment is collected through a third party integration and passed to EXOS.
- **Direct Bill:** The orders will never require credit card payment and will follow normal workflow.

Tip: The payment link will send to the prepay contact type(s) listed within the client profile.

If the order is a Quote or Complex, the order will create a quote task and delay the order. The payment link will not automatically send to the contact(s) until approval of the quote.

Prepay Task Workflow

Once an order has been established as prepay, an order exception task will generate and will not be available for assignment or scheduling until payment is received.

The standard workflow for a prepay order will vary based on the configuration for Always Prepay or Sometimes Prepay.

Always Prepay:

Order Creates → Prepay Exception Task Link Sent to Contact → Payment Received → Assignment Scheduling

Sometimes Prepay:

Order Creates → Prepay Exception Task → User Sends Link to Contact → Payment Received → Assignment Scheduling

Depending on if there is missing order data or issues collecting payment, additional tasks or delays may trigger for review or action at various points in the process.

Issue	Trigger	Type	Resolution
Prepay Contact Missing	Client designated prepay contact is missing	Task Attribute	1. Confirm contact type required in client profile, add contact to order 2. Change to Direct Bill
Credit Card Declined	Credit card is declined	Note	1. New payment received 2. Change to Direct Bill
Credit Card Information Required	Payment not received within set timeframe or attempts to collect	Delay	1. Payment received 2. Change to Direct Bill
Credit Card Partial Payment	Payment not received in full (External Prepay only)	Note	1. Payment received 2. Change to Direct Bill

If an order is cancelled and a cancellation fee is required, a user will adjust the client fee to the amount of the cancellation fee and refund the difference to the credit card.

Payment Link

A user will find the option to manually send the payment link to the prepay contact(s) under the prepayment information in the Client Service View.

Payment Capture

For each transaction the following information is captured and retained in the client payment (invoicing) screen:

- Date of Transaction
- Type of Transaction
- Authorization Code
- Name on Card
- Credit Card Type
- Last Four Digits of Credit Card
- Amount

GET NEXT/TASK PROCESSING

Users will work through a pipeline of order tasks using the task dashboard or Get Next feature.

Get Next will provide a user with the order next in line to be worked based on user and task priority configurations.

Tasks and Resolutions

When using Get Next, the user may come across one or more tasks to complete on an order.

Task	Trigger	Actions/Resolutions
Order Exception	See Order Exception Processing	See Order Exception Processing
Escalation	A task is escalated to management or team lead	1. Close the task with a note 2. Schedule follow up of task 3. De-escalate the task

Delay Review	Review a delay prior to notifying client or follow up on a delay	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task 4. Resume the delay 5. Send the delay to the client
Client Request	Client request triggered by client via website or client service member	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task 4. Reply to client request 5. Add a delay
Integration Event	Inbound communication from client through integration	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task 4. Add a delay
General Communication	Cross Module Task sent by Vendor Operations	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task
Quote Request	Created when a Vendor Operations user 'Submits Quote' on a live order	1. Approve the quote 2. Deny the quote 3. Add a delay 4. Schedule follow up of task 5. Escalate the task
Trip Fee Review	Creates when a Vendor Operations user approves or submits a trip fee requesting charge the clent	1. Charge client 2. Do not charge client 3. Add a delay 4. Escalate the task
Cancellation Fee Review	Order requires cancellation and confirmation if a client fee is required	1. Cancel order (Edit Order) 2. Schedule follow up of task 3. Escalate the task 4. Add a delay
Special Workflow Notification*	Notification of specific workflows triggered (reasons will vary)	1. Close the task with a note 2. Escalate the task

Reassignment Review*	Specific reassignment reasons trigger client review	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task 4. Add a delay
Review IBTS Fulfillment*	Notification that IBTS is ready for completion	1. Close the task with a note 2. Schedule follow up of task 3. Escalate the task 4. Add a delay

*Client specific task based on configuration

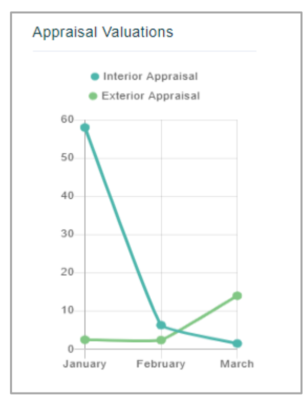
PERFORMANCE DATA

All users have access to review client and overall performance statistics within the three dashboard options:

- **Performance Dashboard:** Provides an overview of orders completed or cancelled within the past 3 months.
- **Pipeline Dashboard:** Provides an overview and details into the current pipeline of orders.
- **Internal Task Dashboard:** Provides an overview and details of client service tasks.

Performance Dashboard

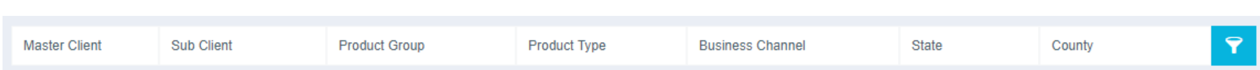
The Performance Dashboard provides a quick view into the following items for the past 3 months:



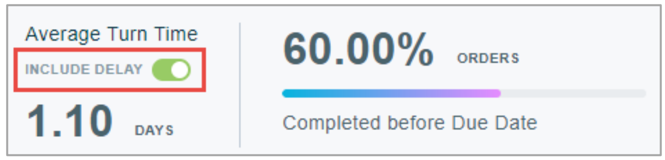
- Order volume
- Turn time
- Revision requests
- Client delays
- Cancellations

The dashboard does not provide the order level details for a user to review, only high-level data.

Adjusting the filters at the top of the screen, allows the user to look more closely at a particular client, product, or market's performance.



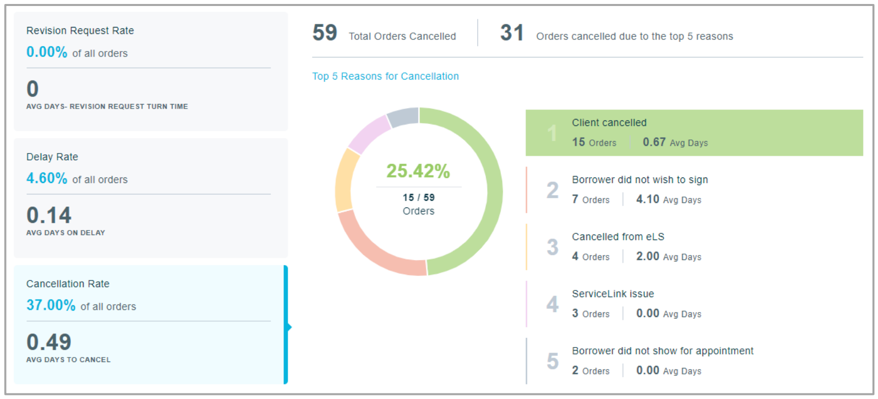
Tip: By using the toggle, a user can choose to include or exclude client delays from the average turn time results.



The bottom section provides the user insight into the totals, rates, timeframes, and top 5 reasons of:

- Revision Requests
- Delays
- Cancellations

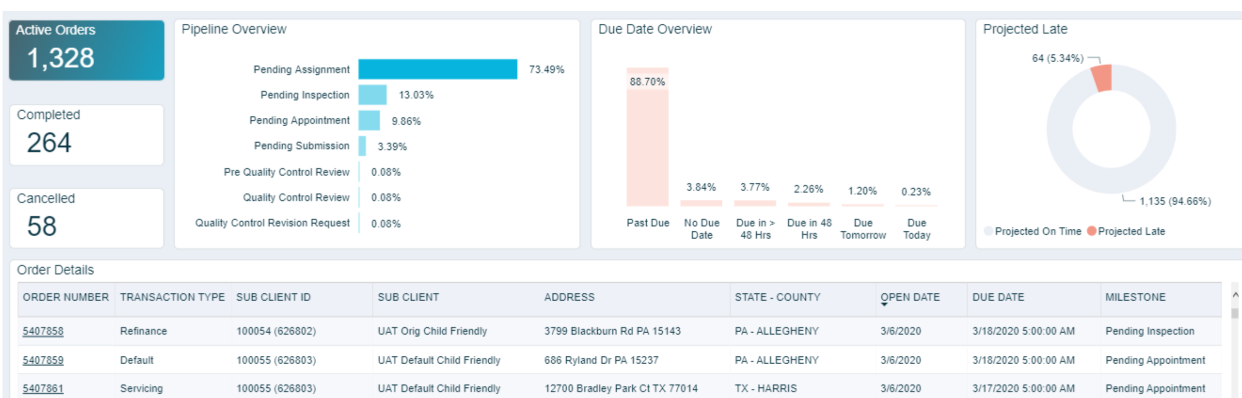
Clicking on each topic's card displays more information on the right.



Pipeline Dashboard

The Pipeline Dashboard provides insight into the status of open orders.

The dashboard defaults to display orders for all clients, but a user can adjust the data with the filters at the right of the screen.



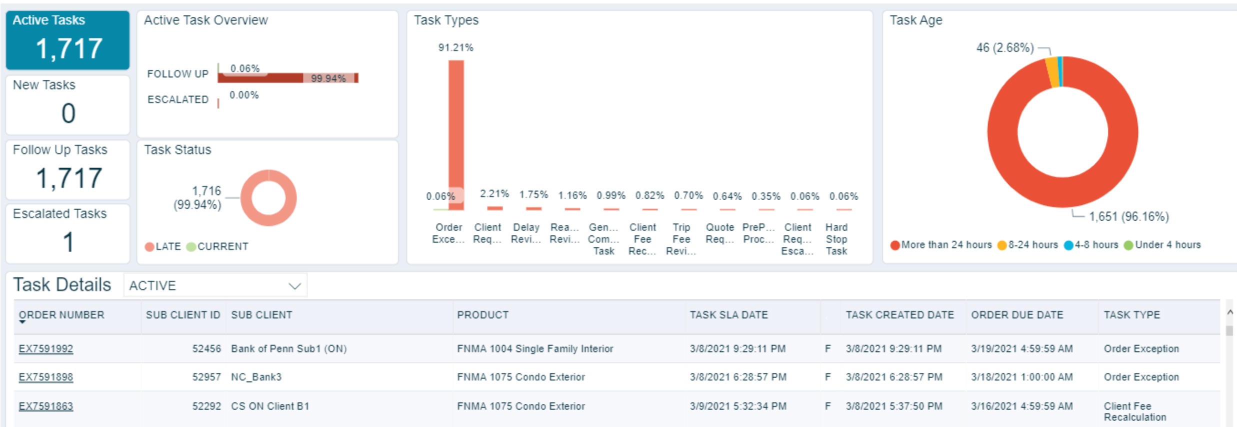
ORDER NUMBER	TRANSACTION TYPE	SUB CLIENT ID	SUB CLIENT	ADDRESS	STATE - COUNTY	OPEN DATE	DUE DATE	MILESTONE
5407858	Refinance	100054 (626802)	UAT Orig Child Friendly	3799 Blackburn Rd PA 15143	PA - ALLEGHENY	3/6/2020	3/18/2020 5:00:00 AM	Pending Inspection
5407859	Default	100055 (626803)	UAT Default Child Friendly	686 Ryland Dr PA 15237	PA - ALLEGHENY	3/6/2020	3/18/2020 5:00:00 AM	Pending Appointment
5407861	Servicing	100055 (626803)	UAT Default Child Friendly	12700 Bradley Park Ct TX 77014	TX - HARRIS	3/6/2020	3/17/2020 5:00:00 AM	Pending Appointment

Tip: The graphs can be clicked on to dive into more detail on the order that make up that population.

The Order Details section will display the order level detail for the filtered data and access to the individual orders that make up the population.

Internal Task Dashboard

The task dashboard is an internal only view into the current open client service tasks. The dashboard will automatically display the tasks associated with each user's subclient group configurations.



Tip: The graphs can be clicked on to dive into more detail on the order that make up that population.

The Order Details section will display the order level detail for the filtered data and access to the individual orders that make up the population.