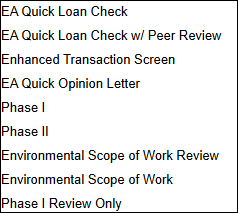
Links to good Client Recordings to Watch (if desired). Please check with Assen if you don’t have access to them. Please note that some settings may change over time, and sometimes our understanding of the settings and the questions we ask each client also evolve.

* Non-Glances Clients:
  + [AgCarolina – 05/25/25](https://dohringgroup-my.sharepoint.com/:v:/r/personal/leigh_realwired_com/Documents/Recordings/AgCarolina-YouConnect%20Onboarding%20Call-20250523_073130-Meeting%20Recording.mp4?csf=1&web=1&nav=eyJyZWZlcnJhbEluZm8iOnsicmVmZXJyYWxBcHAiOiJTdHJlYW1XZWJBcHAiLCJyZWZlcnJhbFZpZXciOiJTaGFyZURpYWxvZy1MaW5rIiwicmVmZXJyYWxBcHBQbGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXcifX0%3D&e=KC4cs5)
  + [Simmons – 08/08/25](https://dohringgroup-my.sharepoint.com/:v:/r/personal/missie_realwired_com/Documents/Recordings/Simmons%20Bank%20-%20General%20Settings-20240808_192308-Meeting%20Recording.mp4?csf=1&web=1&e=rLH2QJ&nav=eyJyZWZlcnJhbEluZm8iOnsicmVmZXJyYWxBcHAiOiJTdHJlYW1XZWJBcHAiLCJyZWZlcnJhbFZpZXciOiJTaGFyZURpYWxvZy1MaW5rIiwicmVmZXJyYWxBcHBQbGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXcifX0%3D)
* Glances Client
  + United (Bank with United) – [Part 1](https://dohringgroup-my.sharepoint.com/:v:/r/personal/missie_realwired_com/Documents/Recordings/United%20Bank%20-%20YouConnect%20onboarding%20weekly%20calls-20250806_083024-Meeting%20Recording.mp4?csf=1&web=1&e=Oc1Jta&nav=eyJyZWZlcnJhbEluZm8iOnsicmVmZXJyYWxBcHAiOiJTdHJlYW1XZWJBcHAiLCJyZWZlcnJhbFZpZXciOiJTaGFyZURpYWxvZy1MaW5rIiwicmVmZXJyYWxBcHBQbGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXcifSwicGxheWJhY2tPcHRpb25zIjp7InN0YXJ0VGltZUluU2Vjb25kcyI6MzA2Ni44OH19) and [Part 2](https://dohringgroup-my.sharepoint.com/:v:/r/personal/missie_realwired_com/Documents/Recordings/United%20Bank%20-%20YouConnect%20onboarding%20weekly%20calls-20250813_082936-Meeting%20Recording.mp4?csf=1&web=1&e=R34rAG&nav=eyJyZWZlcnJhbEluZm8iOnsicmVmZXJyYWxBcHAiOiJTdHJlYW1XZWJBcHAiLCJyZWZlcnJhbFZpZXciOiJTaGFyZURpYWxvZy1MaW5rIiwicmVmZXJyYWxBcHBQbGF0Zm9ybSI6IldlYiIsInJlZmVycmFsTW9kZSI6InZpZXcifX0%3D) (August, 2025)

**(OPTIONAL) – Look up the following info for each client before the General Settings call:**

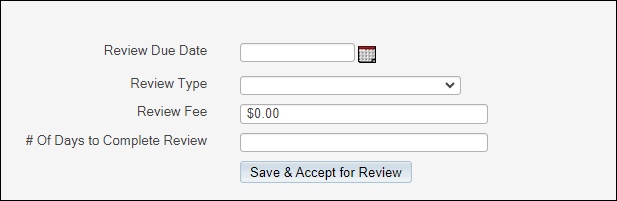
URL –   
Key **Contacts** –  
Glances?  
IF Glances - Will all LO users be on Glances and not log on to YC, or will all or some log on to YC as well?  **Current System if Any?   
Request Types (copy/paste screenshots). Example:** **Will they be doing any Environmentals?   
Will they do any External Reviews?   
Calls lead by Missie or Leigh?   
What names do they use for the LO and LO Copy fields, and which ones do they have visible? (can insert screenshot below if desired) –   
What names do they use for the JM and JM Copy fields, and which ones do they have visible? (can insert screenshot below if desired) –  
What is their fee structure?** (Missie or Leigh can check the contract and confirm):

* **General Settings** – any of the following fees already entered?
  + Transaction Fee (this is the fee paid as a % from the Vendor Fee on 2 step requests) – X
  + System Min Fee (Min they’ll be charged if the Transaction Fee % is below the Sys Minimum - X
  + Additional Vendor Fee (Related to Setting 03 and forces the Transaction Fee to be displayed in the VBR and Totals) – X
* **Request Type Setup** – Any Fees associated with any of the Request Types? X
  + *Notes:*
    - *Usually the 1 step requests will have flat fees or no fees.*
    - *If a 2 step request has a FLAT fee, it will override the Transaction Fee in General Settings, just for that request type.*
* *Do they have the Management Fee field visible, and if yes, was it relabeled?*
* *Important – we may start seeing soon banks that pay a FLAT Annual Fee. Not sure how that will be reflected in YC (if at all), so they can pass the fees on to the borrowers.*

**Info that can help with clients using Glances (if applicable):**

* For General Settings that can be impacted by Glances, additional info will be provided below.
* High Level:
  + If any of their Glances Users (LO Type of Access) will also log on to YC, or if they’ll also have LOs that will only use YC:
    - We go through all the configs.
  + If all of their users with LO Type of Access will only use Glances and will NOT be logging on directly into YC:
    - We tell the client that we still have to go through all the configs so that the system is ready/set up properly IN THE EVENT that down the road they allow any users with LO Type of access to log on directly into YC.
* **INTERNAL:**
  + Once Glances is enabled, each LO that will use GLANCES will have this box checked or unchecked on their profiles:  
    
  + If it’s CHECKED:
    - All e-mails those users receive will have links that take them DIRECTLY into Glances and never into YC.
    - Technically if those users do know the YC URL and their credentials (SSO or not), they can get into YC. The URL is just never shared with them and they don’t get trained on YC.
  + If it’s UNCHECKED:
    - Those users will also be expected to log on into YC as needed and all e-mails that they get will have links taking them directly into YC.
    - Whether they have or don’t have Glances access is just a formality

**Additional Prep for my call with CLIENT ABCD:**

1. General Settings that I changed in advance on their site:
   1. CHECK – “VBR – Hide recommend button”   
      
   2. CHECK – “Remove JM Notification Copy when cloning” (Note - cloning not available to LOs in Glances, YET)  
      
   3. CHECK – “Enable Review Due Date Required”  
      
      1. We enable this one just so we can show them on THEIR SITE as we go through the settings.
2. User Management – have accounts been created for any of their users yet?  
   *Note – rare but can happen sometimes if they asked to get access as soon as possible so they can start testing, etc.).*
3. (OPTIONAL) Additional TEST Files that can be created **on their site** (by CLONING), in order to show them some of the features. File #’s may vary depending on the numbering sequence of each client site:
   1. File #X – put it in **Vendor Complete -> Assignment Complete Status** (can use to demo settings #09).
      1. Make sure there’s no Review Fee, Review Due Date or Review Type on the FILE. This way when you press **Accept for Review**, the popup comes up.   
         
      2. Also make sure there are 2 or more Requests Docs so you can show the checkboxes in settings #25 and 26 below.
   2. File #X – **in Bids Received status with 2 Bids** – to help show the VBR and its Fees (without YC fee) , Vendor Grades, view Summary and it’s Breakdown of Fees. Can submit 2 bids from the same vendor or different vendors.
      1. Make sure that on that test file, you populate the following fields and fees (so they can show up in the VBR, totals, the “I”, etc.) – **Review Type** and **Review Fee; Management Fee** (if they use this field); X days to complete Review.
      2. Can help with Setting #3, where you can show how the fees look BEFORE the YC fee is added to the Vendor Fee and totals.
4. Some examples and other items from **CS Site** (you verify they’re still good before each call):
   1. File 8803 – Shows the % of the fee rolled on to the Fee quote. Related to General Setting 03.
   2. File 8871 – to show the Review Approval button and describe the feature. Related to General Setting 08.
5. TIPS for the call:
   1. Share screen and make sure everyone can see well (in case you need to zoom in).
   2. Welcome to talk about each setting, make a note of the decision and then apply the changes AFTER the call, OR you can apply them as you go (if you go this route, please make sure to DOUBLE CHECK them later).
   3. To tell the client:
      1. Today we’ll go over ?30? or so different settings. We’ll talk about them, I’ll show you some examples and help you make a decision on how to configure them.
      2. Keep in mind – whatever you decide on today, is not final. If you change your mind on something once you start testing (or even after go live), just let us know. Most settings can be adjusted very easily.

**(INTERNAL) Purpose of the table below:**

* It was initially created with the intent to send it directly to the clients.
* Currently, it includes the following:
  + 1 or 2 versions of wording that can be used when showing each setting to the clients and asking them to decide.
    - The options they have.
  + Tips and lessons learned (including Glances).
  + Placeholders where you can the client’s preference (for each setting).
* Important TIP:
  + You can make this a living document that you can continue to improve as you learn new things, settings change, etc.
  + Once you use it for a client, you can make a copy and then use it for the next client.
  + And you can make adjustments and add notes as needed.

**YouConnect – General Settings**

## ***What are General Settings?***

*Settings which we will configure on your YouConnect site, based on your preferences and unique business needs. As needed, they can be further adjusted during Onboarding or post go-live.*

## ***Instructions:***

1. *Please review the table below. Choose the desired configuration for each setting and enter the corresponding letter (A, B, …) within the last column.*
2. *If you are not sure what to select for a specific setting or have questions, please make a note. We will address on the next scheduled call or via e-mail.*
3. *Once completed, please e-mail the document to the YouConnect Onboarding Team.*
4. *The following resources are available at the bottom of this document:*
   1. [*Glossary*](#Glossary)*.*
   2. *Additional information and screenshots for some of the settings.*

***GS = General Settings***

|  |  |  |  |
| --- | --- | --- | --- |
| # | Setting Name/Description | Configuration Options | You Selection/ Notes/Questions |
| 01 | **Default Filters by Request Status – “Not Submitted” Orders** Description: By default, the system displays “Submitted” and “In Progress” orders each time you click on the Requests tab.  **For Job Managers (and Bank Admins),** you can decide if “Not Submitted” orders will also be displayed by default, which would allow them see orders that may be potentially coming down the pipeline.   *Note: The Request status filters can be manually adjusted at any time, no matter what the default filter settings are*.  ***INTERNAL*** *– all we do it check/uncheck this one box in GS* | A) Make “Not Submitted” orders visible to **Job Managers (and Bank Admins**) by default under the Requests tab.   B) DO NOT make “Not submitted” orders visible to Job Managers (and Bank Admins) by default under the Requests tab.  **OTHER INTERNAL:** For non-RIMS Clients: Explain what Job Managers are (the Appraisal Dept processing the orders) and say that on the requests tab you can change the filters as desired.  Would you like to see Not Submitted (aka Draft) orders by default or not, each time you click on the Requests tab as a JM?  **GLANCES Users** – currently there is no option for them to create Not Submitted (Draft) orders. This setting only applies to orders created WITHIN YC. | **CLIENT:** |
| 02 | **Parcel Number Format** Description: If you’re using “Parcel Number” as a field on your Property record layout, this setting allows you to choose between two available field format options (both require manual entry).  **INTERNAL**:   * Setting is called – “Parcel number with State and County”. * You can always put the 2 screenshots in a word doc so they can get a visual on how those look. * Most choose option A) as the property address already has the State and County. * **GLANCES** – If their LOS (where the property data will come from) does not have State and County for each Parcel #, then option A) may be best. | A) Capture only Parcel Number(s).     B) Capture Parcel Number(s) as well as the State and County associated with each Parcel. | **CLIENT:** |
| 03 | **Additional Vendor Fee**  Description: If your YouConnect system/handling fee is based on a percentage (%) of the engaged vendor’s fee (OR is a flat fee), you have the option to display it on certain screens and panels.  Enabling this setting is recommended if you’d like the Lenders (REQUEST SUBMITTERS) to see the system/handling fees as part of the **vendor fees** and **totals**, so they can pass them on to the borrowers (as needed).  [Click here for additional info and examples.](#Bookmark04)  **If you choose this feature to be enabled, would you also like another Fee Quote column to be added to the VBR for your JMs and/or Lenders that shows the Vendor Fee WITHOUT the YC fee?**  **INTERNAL:**   * This setting DOES NOT control the Flat Fees getting displayed. Just the % based that are in GS. * If a request type (1 or 2 step) has a Flat Fee, that will be in **Request Type Setup**. The “Transaction Fee” field is where the Flat Fee is entered, and the “Additional Vendor Flat Fee” is the YC system fee (usually the same), that if entered in that field will display in the Totals and Fee Breakdowns). This for example includes 1 step Reviews done internally, even if they have no Review Fee. * Once this is enabled, it will ONLY IMPACT orders created from   You can ask the client:   * If they use another system like RIMS: Do you currently show the system/handling fees to the lenders so they can pass them onto the borrowers and collect them? And if not…is that something that you’ve wanted to do? IF yes, we do have a feature that can help with that * If they don’t currently use nay system: Do you want to show the YC system/handling fees to the lenders so they can pass them onto the borrowers and collect them? If yes, we do have a feature that can help with that   **GLANCES:** This settings DOES IMPACT how the Glances users see the fees and if the YC Processing Fee will be included. | A) Include the YouConnect system/handling fees within the vendor “Fee Quotes” and “Totals”.    B) DO NOT Include the YouConnect system/handling fees within the vendor “Fee Quotes” and “Totals.  **DECISION on the 2nd Fee Quote Column in the VBR that always shows the actual Vendor Fee?**  **OTHER INTERNAL:**   * Say that their YC Fees seem to be set at X.XX% of the vendor fee on their site. * First show them the VBR on their site on File X (where the **X.X%** is not included). And then on CS File 8803 (where the YC Fee is included). * Some Test Results: * On the “I” (additional details), ONLY ONCE A VENDOR IS ENGAGED – For both LOs and JMs, it will show there as Vendor Fee with X% (Or Flat fee) and also in the Total. *If they choose to make those visible to them at all, which they’ll decide later in settings further down.* * In the VBR – for both LOs and JMs. They’ll see it as part of the Total and in the Fee Quote. * ***LOs will only see the YC Fees it in the VBR when choosing a bid on that screen*** *(if the bank uses the LO Bid Selection feature)). And they will continue to see the bid they selected in the VR, ONLY up until they’re engaged.* * **Once this is enabled (for % Fee or Flat Fes) - it will ONLY IMPACT orders created from that point on.** * If on the main GS setting we choose NOT to show the YouConnect Fees, the below setting will auotmaticallyl follow and show or not show the YC system fees (% or Flat): | **CLIENT:** |
| 04 | **Default Setting for “My Items” (Bank Admins)**  Description: Allows you to choose whether “My Items” will be checked or unchecked by default for all Bank Administrators under the Requests tab search filters.  If checked, by default they will only see Requests that they’re associated with (i.e. their name is within one of the Job Manager fields). *And to see all Requests, they’ll have to press “Clear” or uncheck “My Items” before doing a search.*  [Click here for a screenshot example.](#Bookmark05)  ***INTERNAL*** *– setting name – “Default setting for MyItems Checkbox….” Uncheck the box if Bank Admins should NOT have the box checked by default. Can only test as a Bank Admin (does not apply to System Admins).* | A) Check “My Items” by default for all **Bank Administrators**, with the option to uncheck it if they want to see all Requests.    B) Uncheck “My Items” by default for all Bank Administrators, with the option to check it if they want to see only Requests that their name is on.  **OTHER INTERNAL:**   * You can Explain what a Bank Admin is. Usually just a few people at each bank that have access to some admin features on top of the access a Job Manager has. Called Content Admins in RIMS. * Another way to ask them 1: When they go to the Requests tab, do you want them to initially see only items their name is on, or all orders? They always have the option to uncheck the box and press search to see all. * Another way to ask them 2: When Bank Admins go to the requested tab, do you want the first thing they see to be just orders that their name is on? Meaning the “my items” box will be checked but they can uncheck it and press search to see all orders. | **CLIENT:** |
| 05 | **Department Filters on Searches**  Description: If your orders will be routed to and processed by multiple departments (Example: Appraisal dept and Environmental dept), the search filters on each department’s Requests tab can be preset to display by default only the types of orders that they process. They will have the option to change the filters in order to see all order/request types.  ***INTERNAL*** *– setting name – ”Disable Department filters on searches”.*  *Under Request Type Setup, we can tie each Request Type to a department (which represents a POSITION). For now, we just enable or disable this feature and ONCE we add the User Positions, we can tie each request type to the corresponding JM position (dept).* | *Please skip if you have only 1 department that will be processing orders.*  A) Allow the Job Managers of each department to see all order/request types by default.  B) Allow the Job Managers of each department to see by default only order/request types that their department processes.  **INTERNAL:**  Another way to ask the client if you see they might be doing Environmentals for example:   * I see that you’ll also be doing environmentals. Do you have a separate Env dept, or does your Appraisal dept handle all orders that come in? * If separate, we can set it to where by default Env JMs will see only Env orders (and they can change it) and Appraisal JM will only see Appr request types | CLIENT: |
| 06 | **Estimated Total Completion Date**  Description: Enables the “Estimated Total Completion Date” field and associated features.  [Click here for additional information and screenshots.](#Bookmark07)  ***INTERNAL:*** *Takes the* ***expected******report delivery date in the VBR*** *(which matches the Revised Report Delivery Date in the Report Submission panel) and adds* ***the # of days to complete the Review (if known).*** *And if those dates are adjusted, the Estimated Total Completion Date will automatically change. OR, you can manually change the Est. Total Coml Dae date if needed. If you change it manually, the date stays set until manually changed.*  *Notices will also go out to your lenders each time the date changes.  Once fully enabled, it automatically enables all notices tied to this feature.*  ***See the KB for EXACT steps on how to enable on a site! Should be done after the call due to the extra steps.*** | A) Enable “Estimated Total Completion Date”.  B) Disable “Estimated Total Completion Date”.  **Other Internal Info:**  Can show on the Requests tab on CS, and File 8944. | **CLIENT:** |
| 07 | **Enable Edit for “On Hold” Requests**  Description: Once a Request has been placed on hold, no one can make edits to it (with the exception of adding comments and additional Request docs), until the hold is removed. You have the option to allow Job Managers and/or Bank Admins to edit Requests while they are on hold.  ***Internal*** *– Setting name is the same.   Can also ask the client:* Do you want to allow JMs and/or Bank Admins to Edit request info while on hold? We do suggest, YES on both. | A) Allow both Job Managers and Bank Admins to edit Requests while they are on hold.  B) Do not allow Job Managers or Bank Admins to edit Requests while they are on hold.  C) Allow only Bank Admins to edit Requests while they are on hold.  D) Allow only Job Managers to edit Requests while they are on hold. | **CLIENT:** |
| 08 | **Enable Review Approval** Description: If this feature is enabled, an **optional** “Review Approval” button becomes visible upon Review completion (internal or external).  When used, it notifies the selected “Review Approver” that a Review has been completed and requires their approval before the Request can be marked as Completed. All approvals are recorded within the system.  ***INTERNAL*** *– setting name is the same. Once disabled, hides the button and all Review Approval related fields from the request records.* | A) Enable the “Review Approval” feature.  B) Disable the “Review Approval” feature.  **OTHER INTERNAL:**  Give as an example – maybe they want each Review to be approved by someone, or if they have Junior Reviewers or VERY complex reviews, they might want someone else to take a look and approve. | **CLIENT:**  I can show them a file on CS 8871 |
| 09 | **Review Due Date – Require at Review Acceptance (Internal Reviews Only)**  Description: An Internal Review can be either assigned to a Reviewer, or they can manually select it from the queue. In both scenarios, the Reviewer must Accept the Review in order to advance the workflow. If this setting is enabled, the Reviewer will be REQUIRED to enter a **Review Due Date** at the time of Review acceptance. And they’ll also be presented with a few other optional fields that they can fill out or adjust.  *Note: We recommend enabling this feature, in order to ensure that the field is populated by each Internal Reviewer. The prompt will also allow the Reviewers to enter additional information (if known at that stage). Rest of fields are not required on that popup. If setting is disabled, popup won’t come up at all.* | A) Require Reviewers to enter a “Review Due Date” once they press “Accept for Review”.  B) DO NOT require Reviewers to enter a “Review Due Date” once they press “Accept for Review” (there will be no prompt window).  **INTERNAL:**  You can show them on **File #X** on their site as long as you enabled this feature already.  The popup window will come up ONLY if the Review Due Date is missing at the time of acceptance. | **Client:** |
| 10 | Forbid Edit to Loan Officers (Request/Property) once a JM has Accepted the Request  Description: Controls the Loan Officers’ ability to edit a Request and its Property once the Request has been submitted and Accepted by a Job Manager.  NEW: If enabled, the property they can update ONLY when there’s no requests in progress tied to it.  *INTERNAL: Setting name – “Forbid Edit to LOs (Requests/Property)”*  *If the client uses different terminology for “LO”, adjust your questions/wording accordingly. Can use “Request Submitter” if needed.*  *Note: Best practice is to not allow Loan Officers to make modifications once a newly submitted Request is Accepted.  Their ability to chat with the Job Managers and upload additional documents (at any stage of the workflow), will not be impacted.  If a Job Manager requires additional information, they can “Reject” the request instead of Accepting it, which will allow the Loan Officer to make edits before resubmitting.* | A) Allow Loan Officers to edit orders even after they have been Accepted by a Job Manager.  B) DO NOT allow Loan Officers to edit orders after they have been Accepted by a Job Manager.  **OTHER INTERNAL:**  GLANCES:   * Tell them we will configure this just in case in the future they have any “lenders” that submit orders direct in YC for any reason. * Otherwise in Glances:   + Once an order is submitted, it can’t be updated. They can only add docs and comments and then the JMs are the only ones that can adjust the request and property records.   + And if the property record is updated in the LOS, as long as the address is a match, when a NEW order comes in, the property record in YC will auto-update.   + If a JM updates a property record in YC, the changes will NOT flow back into the LOS through Glances. | **Client:** |
| 11 | **Always Show Report Panels to Loan Officers**  Description: By default, a Report and its Review (where applicable) become visible to the Lenders automatically once a Request is marked as Completed. A Job Manager can also choose to make any Report or Review visible at an earlier stage, which will notify the Loan Officer(s) on the Request.  If enabled, this setting will allow the Lenders to:   * See the **Report Submission panel** at all times (you’ll choose later on which fields they see). This will allow them to see Vendor Reports as soon as they’re uploaded (no notices will go out). * See the **Request Review panel** at all times (you’ll choose later on which fields they see). This will allow them to see Reviews as soon as they’re uploaded (no notices will go out).   ***Internal:***  *Setting name – “Always Show Report Panels to LOs”.   GLANCES – this setting has no impact on it. If the JMs want to make something viewable earlier, they can use the radio buttons. You can configure it just in case they have LOs log on to YC at some point.*  *The radio buttons only make the Report Upload and Review Form visible. Rest of the fields in the respective panels remain hidden.* | A) Allow Lenders to see **vendor reports** and **reviews** as soon as they’re uploaded.  B) DO NOT allow Lenders to see the report and review until the request has been marked as completed.  *As needed, a Job Manager can manually make a report or review visible at an earlier stage.*  **Other INTERNAL:**  Show them at least one of the Radio buttons on File # X on their site or on any file on CS where the button(s) are visible. | **Client:** |
| 12 | Always Show Bid/Engagement Panels to Loan Officers Description: During Request creation, this panel allows the Loan Officers to enter the desired valuation scenarios, as well as other information that can assist with the bid/engagement process. Once a Request is submitted, Job Managers can adjust any of the data entered in those fields before soliciting vendors.   *If you choose to display this panel to your Lenders, at a later stage you will have the option to decide exactly which fields will be visible to them.*  [Click here for a screenshot of a Bid/Engagement panel with its default fields.](#Bookmark13)  ***Internal:*** *Setting name - Always Show Bid/Engagement Panels to LOs.*  *\*\*\*\*No Glances impact, any fields the bank wants the LO to have in Glances, are set on the Glances order form regardless of placement in a panel in YC).  You can configure it just in case they have LOs log on to YC at some point.* | A) Allow Loan Officers to see the Bid/Engagement panel at all times, and to fill it out when creating a Request.  B) DO NOT allow Loan Officers to see to see the Bid/Engagement panel at any stage.  **Other Internal:**  You can also ask the client: When your Lenders place an order, do you want them to be able to take a stab at things like the desired value scenarios? (you can adjust them after that as a JM).  You can pull File X on their site and shoe them the fields in the Bid/Engagement panel on the JM side. Or just start a new request. | **Client:** |
| 13 | **Always Show Bank Documents Subpanel to Loan Officers** Description: IF enabled, this panel will allow your Loan Officers access to standard documents/forms within the system, which can be set to populate with data from an order when clicked on. Helps cut down on data entry. Example  *Bank Document Examples: Checklists, Review Forms.*  **Internal:**  Glances – Currently, this setting does not impact Glances as Bank Docs can’t be accessed by LOs from there. If this is something that the clients start asking for, we can inform Sunda and the Glances team. | We have 3 main types of docs in the system  **Docs uploaded into specific fields – report, review, invoice, etc.**  **Request docs** – usually supporting docs provided by your lenders with each request.  **Bank Docs** – docs and forms that populate info from the order when clicked on. Could be anything from Review forms to Validation forms Invoices, and others.  Do you ever have the need to allow your lenders access to such Bank Docs that would populate info from the order when clicked on?  A) Allow Loan Officers to see the Bank Documents panel.  B) DO NOT allow Loan Officers to see the Bank Documents panel. | **Client:** |
| 14 | **Enable Loan Officer Bid Selection** Description: Once bids are received, this option allows a Job Manager to select the desired and to send them to Lending (so they can choose the preferred bid). Even with this feature enabled, the Job Manager will still have the option to override the Loan Officer’s decision, or not to run any of the bids by them.  ***Internal*** *Setting name - Enable LO Bid Selection.  Glances – LOs that only use glances will see the bids in there that were sent by the JMs by using LO Bid Selection.* | A) Enable the Loan Officer Bid Selection feature.  B) Disable the Loan Officer Bid Selection feature.  **OTHER INTERNAL:**  Show File # X on their site – how a JM selects bids and then has to press the LO Bid Selection button.  Another way to word on a call: Once you get bids to form your vendors, do you ever send them to your lenders to pick? | **Client:** |
| 15 | Automatically Check “Display to LOs” *Note: If you chose to Disable the previous feature, this setting can be skipped.*   Description: Before a Job Manager can send bid options to Lending, they have to select the desired bids, and then press “LO Bid Selection” to advance the Request to the next stage.  This setting controls whether the bid options will be checked or unchecked by default (for convenience).  **Internal:**  Setting - Automatically Check “Display to LOs” | A) Set all bid options to “Display to LO” by default.  B) Set all bid options to NOT “Display to LO” by default.  **Internal**  SHOW FILE X from their site – where bids have come in.  Another way to word on the call:  Next to each bid, there’s a checkbox that allows you to control which bids the lenders will see once you press LO Bid Selection. Do you want all bids to be checked by default and then you uncheck the ones you don’t want to run by them, or the other way around? This is just for CONVENIENCE! | **Client:** |
| 16 | **Default the Loan Officer to the Ordered By**  Description: When creating a new Request, the name of the person placing the order is automatically populated in the Ordered By field. If this setting is enabled, the Loan Officer field will also auto-populate with the same name (with the option to manually change it).  **Internal:**  *Setting name – Do not default LO to the OB.* **Glances – set up just in case they ever have a user place an order directly in YC for any reason. Maybe for something not in the LOS.** | A) Loan Officer on the order has to be selected/entered manually.  B) Loan Officer is auto-populated from the Ordered By field (with the option to change it).  **Other Internal**  Another way to word it on a call:  When creating a new order, do you want the name of the ORDERED by to Automatically populate into the LO field? (with option to change it of course). OR do you want the LO field to always be blank and for the request submitter to have to manually enter name there?  We recommend NOT to auto-populate, otherwise they may forget to change it. | **Client:** |
| 17 | **Require Prepayment Proof** *Note: If you chose to Disable feature #14, this setting can be skipped.* Description: If enabled, this feature will require the Loan Officers to upload prepayment proof at the time of bid selection. | A) Enable the Require Prepayment Proof feature.  B) Disable the Require Prepayment Proof feature.  **INTERNAL NOTES:**   * If all of their LOs will use Glances and will NOT be logging on to YC – skip this setting. * If they won’t run any bid by their LOs – skip this setting. | **Client:** |
| 18 | **Add JM Notification Copy or LO Notification Copy to the List View with “My Items” Checked** Description: During configuration, you had the option to choose whether the “JM Notification Copy” and “LO Notification Copy” fields will be visible on your request records. If you selected to have either of them visible, this setting controls those users’ ability to see requests that their name is on, under “My Items” on the Requests tab.  **Internal:**  Setting name - same  This also applies to LO and JM Copy 2. | A) Allow users in the “JM Notification Copy” and “LO Notification Copy” fields to see Requests that their name is on, under “My Items”.  B) DO NOT allow users in the “JM Notification Copy” and “LO Notification Copy” fields to see Request that their name is on, under “My Items”. *Note: they will still be able to search for and view those Requests as long as they have access to them.*  **OTHER INTERNAL:**  Make sure you check what they call their LOs and if any of their LO Copy fields were renames.  Another way to ask the client on a call:  Do you want JM Copy and LO Copy to see orders that their name is on when the MY items box is checked? | **Client:** |
| 19 | **Allow Loan Officers to act as Job Managers for Selected Request Types** Description: If enabled, this feature will allow Lenders to assume a Job Manager role for certain request types, and to engage vendors.  **Internal:**   * Feature is RARELY used. * Glances - Just tell them there’s such a feature, but it would be for users that also log on to the system. Not for ones with GLANCES ONLY Access. * This feature has a new version which as of 8/18/25 has not been deployed to all clients. Would allow SPECIFIC LOs to be given that access, instead of all LOs. | A) Enable this feature.  B) Disable this feature. | **Client:** |
| 20 | **Allow Loan Officers to Clone** Description: The “Clone” feature allows users to clone Requests in order to cut down on data entry when a new Request has to be submitted for the SAME property. Once a Request is cloned, it will go into “Not Submitted” status. This allows the Loan Officers to make edits, change the request type if needed and upload documents, before submitting.  **Internal:**   * *JMs have that feature by default.* * *Request Docs do clone as well.* * ***Glances*** *– not an option currently but on Roadmap. We still want to enable/disable it just in case they have or might have down the road LOs that log on directly into YC. An order cloned in YC will NOT flow back into YC through Glances*. | A) Allow Loan Officers to Clone Requests.  B) DO NOT allow Loan Officers to Clone Requests. | **Client:** |
| 21 | **“I” (Additional Details) on the Requests List View – Applies to All Users**  Description: Through this setting, you control which fees are visible on the Additional Details popup window, which can be accessed by selecting the “i” button next to any Request on the Requests tab. **Those fees will be visible to both Loan Officers and Job Managers on the Requests that they have access to.**  **Internal:**  These are the General Settings that control each item: | Fields that you’d like to be **VISIBLE** on the “i” (Additional Details) popup window **Requests tab:**  **Applicable to All Users** (Loan Officers, Job Managers and Bank Admins). When they click on the “I”, do you want them to see any of the following (when there’s a value in them and where applicable):  Hover on “I” on CS site – File 8943   1. Vendor Fee (without the YC fee added) – YES or NO? 2. Vendor Fee with YouConnect’s Vendor Handling/System Fee *(percentage or flat fee, depending on your setup).  This only applies if you chose earlier for the YC fee to display as part of the vendor fees and totals. – YES or NO?* 3. Review Fee – YES or NO? 4. **Management Fee (if they use the field) –** YES or NO? 5. **Show system Fee on 1 step request types?** *This only applies if in Request Type Setup they have Flat Fees entered on any 1-step request types). If enabled, that flat YC fee will appear in the fee breakdowns and totals.* 6. Total Fee – YES or NO?   **Additional Internal:**  On CS, you can Hover File 8943 to show them what the fees look like. | **Client:** |
| 22 | **“I” (Additional Details) on the Requests List View – Applies just to Loan Officers**  Description: Through this setting, you control whether Loan Officers can see the engaged Vendor’s name and the Reviewer’s name (internal or external).  **Internal Info:** *Glances – we configure in case they have (or might have) any users with LO type of access log on directly into YC.*  *In General Settings, the settings are here. Have to UNCHECK to make the fields visible on the “i”:* | Now, a few questions as to what the **LOAN OFFICERS** can see when they click on the “I”. Do you want them to ever see any of the following?   1. Engaged Vendor Name and contact info – once the vendor is engaged. **Show or Hide**? 2. Engaged Reviewer Name and contact info – will make the Reviewer’s name and contact info visible. If the Review is internal, will display the internal reviewer’s name and contact info. **Show or Hide?** | **Client:** |
| 23 | **Field Configurations for Loan Officers**  Description: Controls the ability to hide certain fields and views from the Loan Officers.  *See* [*GLOSSARY*](#Glossary) *for additional information on some of the terms and fields.*  **INTERNAL INFO:**  *Glances Clients – we configure these settings in case they have (or might have down the road) any users with LO type of access log on directly into YC. Otherwise, no impact on Glances.*  **Setting 1:**  Can show them the column on the CS site or even the client’s site, since the JMs can see that column by default.    **Settings 2:**  **Settings 3:**    *LOs will not see Vendor Bid Comments on View Summary in the VBR, like the JMs see (tested/confirmed).* | Setting 1:  On the REQUESTS Tab, do you want to allow your Lenders to See the **Value As Is** as soon as the Appraisers enter it? (A Value As is column will appear on their Requests tab; No Notice will go out)   1. Yes 2. No   Settings 2: *Show them with File #X on their site.*  If your Lenders will have access to the **VBR** (Vendor Bid Response Panel) that allows them to select bids, you have the option to make the following fields and data visible. Which ones do you want to be visible to them?   1. Vendor Grades – **Show or hide?** 2. Fee Quote (the Vendor’s Fee, or the Vendor’s Fee with the YC fee, depending on what you chose to display earlier) – **Yes or no?** - **Show or hide?** 3. Total Fee (this will be a total of all fees that you use) – vendor with or without the YC fee; Review Fee; Management Fee – **Show or Hide?**   Settings 3:  **View Summary Link and info in the VBR for Lenders:** *Not applicable if the LOs will never see the VBR and pic kbids.  Can use 8798 on CS to sow them.*  Show them what info it has by default (Lenders see only the items I’ve highlighted, rest are for JMs):   1. Do you want them to see that View Summary link at all? 2. If YES, do you want it to have BREAKDOWN OF FEES, OR JUST THE TOTAL? *(All fees on that order will display there and whether the YC % is also added, will depend on what you chose earlier in the settings). So if we don’t select BREAKDOWN, it shows just the total. Otherwise Total and breakdown.* 3. And if YES on Breakdown of Fees, do you want the **MANAGEMENT** FEE to show there if one is ever entered for an order? (if they use it) – **SHOW** |  |
| 24 | **Show Request Documents on Vendor Bid Solicitation Webform**  Description: During the bidding process, each solicited vendor will be sent a link to a Webform, through which they can submit their bid(s). This setting controls **their ability to see ANY** Request documents on the Webforms during the solicitation (bidding) process. If this setting is enabled, you can control for each specific doc if it will be visible to them or not.  **INTERNAL**  Setting Name:  AG: I wonder if we need to not even ask about this setting, and just enable it by default. I’ve not ran into anybody that doesn’t want to have the OPTION to make docs visible to bidders as needed. | A) Allow for Request Documents selected by the Job Manager to appear on Vendor Bid Solicitation Webforms.  B) NEVER show Request Documents on Vendor Bid Solicitation Webforms.  I can show them from File # X on their site and use the Bid Solicitation WEBFORM URL below. Made sure it has a few request docs:  URL: to Report Submission Webform with Request Docs on it:  **INTERNAL:**   **Another more simple way to ask the client:**  Do you ever make certain request docs visible to vendors at time of bidding/solicitation (aka – before they have formally accepted the engagement)? | **Client:** |
| 25 | **Request Documents (Display to Vendor – Solicitation Default)**  **INTERNAL**  Setting name: | **The 2 options:**  A) Set all Request Documents to be VISIBLE to the vendors by default during bid solicitation. Job Managers will have to manually DESELECT documents that should be hidden (can be performed at any time, pre or post engagement).  B) Set all Request Documents to be HIDDEN from the vendors by default during bid solicitation. Job Managers will have to manually SELECT documents that should be made visible (can be performed at any time, pre or post engagement).  **OTHER INTERNAL INFO:**  *Explain how the checkboxes work in general and that a JM can quickly choose what to make visible and when. This setting and the next are just for convenience. As new docs come in after request submission, the boxes will be checked or unchecked by default, depending on how this setting was set.* | **Client:** |
| 26 | **Request Documents (Display to Vendor – Engagement Default)** | A) Set all Request Documents to be VISIBLE by default once the selected vendor has confirmed engagement. Job Managers will have to manually DESELECT documents that should be hidden (can be performed at any time, pre or post engagement).  B) Set all Request Documents to be HIDDEN by default once the selected vendor has confirmed engagement. Job Managers will have to manually SELECT documents that should be made visible (can be performed at any time, pre or post engagement). *.* | **Client:** |
| 27 | **Allow Vendors to Upload Documents when Posting a Comment** Description: Once a vendor is engaged, they can continue to communicate with the Job Manager through the built-in chat/comments feature. Through this setting, you can choose whether they can also upload documents. While enabling this feature can have its benefits, if a vendor uploads their Final Report and /or Invoice through this screen (instead of the designated fields), the process can be disrupted, and the Request will not automatically move on to the next workflow stage. | A) Allow vendors to upload documents when posting a comment.  B) DO NOT allow vendors to upload documents when posting a comment.  **OTHER INTERNAL:**  Can use File 8903 to show in CS if it’s still engaged.  Link to CS Webform to submit Report:  <https://cs.realwired.com/vendor/report.php?token=d3bd939c-dbd6-b269-65c8-66e189d05f58&vendor_token=a877d7e0-9743-80bc-099b-500738ae8c76> | **Client:** |
| 28 | **Allow all users to “select” Request Documents (this is for LOs)**  Description: This feature is available to all Job Managers, and can also be enabled for users with LO Type of Access that log on to YC.  In the Request Documents panel, a “Select” button allows you to bring docs from any other Request into the request that you’re working on. The docs will be COPIED from the Request Docs, Report Upload or Review Form fields, INTO the Request Docs of the request you’re working on.    **INTERNAL**  Setting:  *Glances Clients – we configure these settings in case they have (or might have down the road) any users with LO type of access log on directly into YC. Otherwise, no impact on Glances.* | **Do you want to enable this feature for users with LO Type of Access?** | **Client:** |
| 29 | **Show Report on Review Solicitation Form** Description: This setting controls the ability of solicited External Reviewers to have access to the Report before they have been formally engaged.  **INTERNAL:**  This setting is now in **Request Type Setup** and is controlled per request Type. It is unchecked/disabled for all Request Types by default.  Setting: | Show Report on Review Solicitation Webform? Yes or No  IF YES, enable this for all 2 step Request Types, or just come?  *Enter N/A if they NOT use External Reviewers.*  ***INTERNAL:***  *Ways to ask the client:*  **If/when you use external reviewers, do you want them to see a copy of the VENDOR REPORT during the bidding process? (if you’re to use ext. reviewers and the bidding feature is on).** | **Client:** |
| 30 | **Webform Options for Internal Reviewers (without logins) and External Reviewers**  Description: This setting controls the ability to make Bank Documents and Request Documents visible to External Reviewers and Internal Reviewers (that do not have logins).  **INTERNAL**  Setting: | Bank Docs – could be Review Forms that you want those Reviewers to use.  Show **Bank Documents** to:   1. External Reviewers 2. Internal Reviewers (without a login) 3. Both 4. None   Show **Request Documents** to:   1. External Reviewers 2. Internal Reviewers (without a login) 3. Both 4. None | **CLIENT Decisions on each question:** |
| 31 | **Session Timers**  Description: These settings control the ability to expire user sessions due to inactivity and to present warnings after X number of minutes.  This ONLY applies to users that log on directly into YC. | 1. Do you want your login sessions to expire due to inactivity? *If no, they’ll usually expire in 6 or so hrs, unless your PC loses network connectivity or you close the browser.* 2. If YES, after how many minutes or hours should they expire? 3. How many minutes before the session expires should they get the 1st warning? (Timer on the bottom right will turn yellow and they can extend it) 4. And how many minutes before expiration should they get the 2nd final warning? (screen popup, asking them if they want to extend the session) | **CLIENT Decisions:**  Enable or Disable?  Main Expiration:  Waring 1 (yellow) –  Warning 2 (popup) –  Examples:  1800 secs (60 mins)  600 secs(10 mins)  300 secs (5 mins) |
|  |  |  |  |

*Using the arrows, you can expand each item below to see additional information.*

## **Glossary**

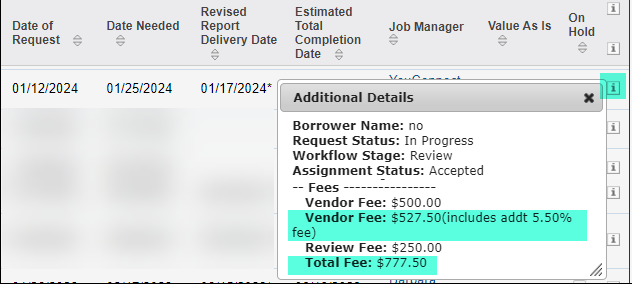
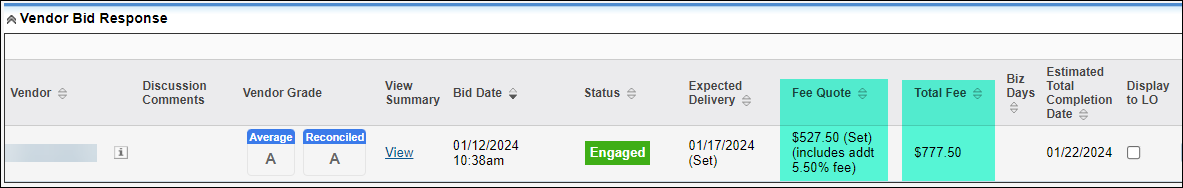
|  |  |
| --- | --- |
| **Term** | **Description** |
| Appraised Value (list view) | The value entered by an appraiser at the time of report-submission, as displayed within the “list view” of the Requests tab. |
| Bank Documents |  |
| Bulk Bid View | NOT SURE WHICH THIS VIEW IS. Description and maybe a screenshot needed to help with setting # 21 |
| Fees | Vendor Fee – the fee charged by each vendor for services performed.  Vendor Handling Fee (YouConnect System Fee) – the fee charged by YouConnect (flat fee or based on a % of the Vendor Fee).  Fee Quote – the Vendor Fee, OR the Vendor Fee + the YouConnect System Fee (if the setting to combine them within the Fee Quotes is enabled).  Review Fee – the fee charged to perform a Review (Internal or External).  Management Fee – optional field, often used to track internal dept. processing/transaction/handling fees.  Total Fee – the total of all fees on a Request. |
| JM Notification Copy | An optional field, which allows an additional Job Manager to be entered on a Request. They will receive all notifications that the primary Job Manager receives. |
| LO Notification Copy | An optional field, which allows an additional Loan Officer to be entered on a Request. They will receive all notifications that the primary Loan Officer receives. |
| Not Submitted Order | Also known as Draft. Each time a new order is created (including a clone from an existing order), it will go into “Not submitted” status until it is Submitted. |
| Request | Also known as File or Order. Always tied to a specific property. |
| Request Documents | Documents provided by Lending with each Request. Lenders can upload additional Request documents at any stage. Job Managers can select which documents (if any) to make visible to the vendors at the time of bid solicitation and post engagement confirmation. |
| User Types | Loan Officer (LO) – lowest level of access within the system, primarily used by the Lending Department to submit new requests and to access existing reports and reviews. Sometimes referred to as Account Officers or Relationship Managers.  Job Manager (JM) – access used by the Appraisal and other departments for processing Requests, engaging vendors and others. Can access Vendor profiles and can be granted optional access to User Management.  Bank Administrator (BA) – highest level of access available to clients. It includes Job Manager access, plus the ability to access a limited number of Admin features (dropdowns, vendor letters, email templates and others).  *System Administrator – reserved for YouConnect System Administrators and Support Staff.*  Vendor – used for all users that do not have direct access to the system (vendors, external reviewers, internal reviewers without system access). |
| VBR (panel) | Vendor Bid Response panel – allows you to see XX and XX on 2 step orders where vendors are solicited for bids and engaged. |
| Vendor Bid Solicitation | The process of soliciting bids from external vendors. |
| View Summary | A link within the Vendor Bid Response Panel. It opens a popup screen with information on fees, delivery dates and others. |
| Webforms | Web pages through which vendors and reviewers can manage their Requests, submit reports and reviews, upload credentials and others, without access to the system. |

## **Additional Information and Screenshots**

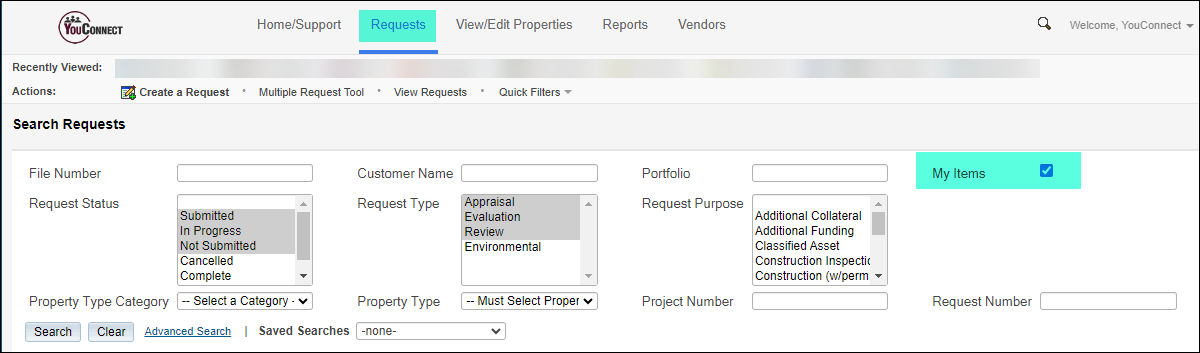
### **#03: “Additional Vendor Fee”**

*Note: through a different setting, you’ll have the option to choose whether fee breakdowns are displayed on certain screens.*

When this setting is ENABLED, the following screens will include the YouConnect system/handling fee (% or flat) within the Fee Quotes and Totals:

* (All User Types) - The “Additional Details” screen that can be accessed by pressing “i” on any order that is displayed under the Requests tab:  
  
* (Job Managers) - The “Fee Quote” and “Total Fee” columns of the Vendor Bid Response (VBR) panel.   
  
* (Lenders/Loan Officers) – a limited version of the above Vendor Bid Response (VBR) panel, which is only visible to them during the Loan Officers bid selection process (if you choose to enable this feature on your site).

### **#04: Default Setting for “My Items” (Bank Admins)**

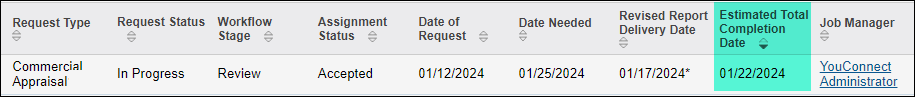
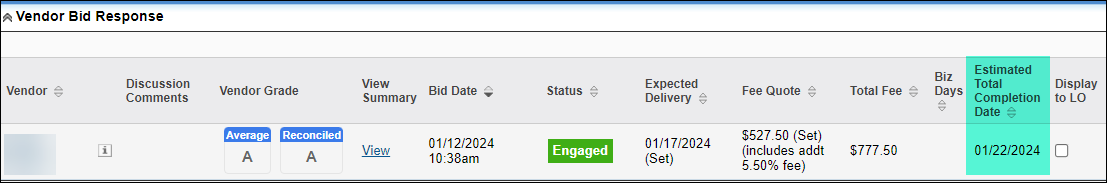
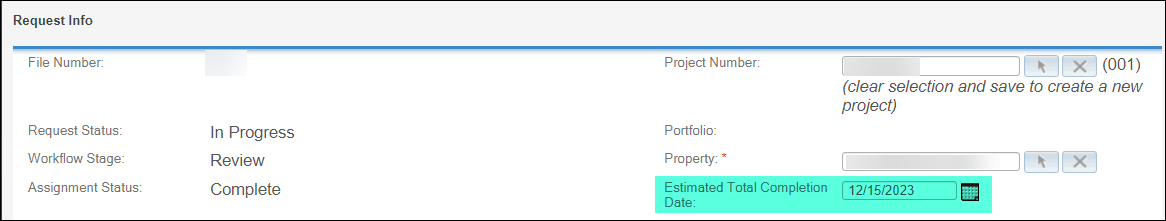
Example: “My Items” checked by default on a Bank Administrator’s Requests tab, with the option to uncheck it:  


### **#06: Estimated Total Completion Date**

What is “Estimated Total Completion Date”?

* The date by which the report as well as the review (where applicable) are expected to be completed.
* In order to determine that date, the system uses the vendor’s “Expected Delivery Date” and adds the “# Of Days to Complete the Review” (if the value has been entered, and where applicable).

Once enabled, this feature adds the following functionality:

* Requests tab – a new “Estimated Total Completion Date” column will become visible within the list view.   
  
* Vendor Bid Response (VBR panel) - a new “Estimated Total Completion Date” column will be added.   
  
* An “Estimated Total Completion Date” field will be added to the Request Info panel of your Requests:  
  
* An e-mail notification will be sent to Lending, each time the “Estimated Total Completion Date” changes. It can change due to any of the following:
  + You’ve manually overridden the automatically populated date within the field (from that point on, the system will not update it automatically).
  + You’ve extended the time the vendor has to complete the report, by entering a different date within the “Revised Report Delivery Date” field.
  + You’ve changed the value within the “# Of Days to Complete the Review” field.

### **#12: Always Show Bid/Engagement Panels to Loan Officers**

*Note: through a previous configuration, you were asked to select 1 of 4 available Bid/Engagement Panel options.*   
Example: A Bid/Engagement panel on the Lending side with its default fields. If you choose to make the panel visible to your Lenders, you will be given the option to pair it down on your Lender view (as part of the onboarding process).   
