2018 McCracken Conference

TIPS FOR CONFIGURING THE PORTAL

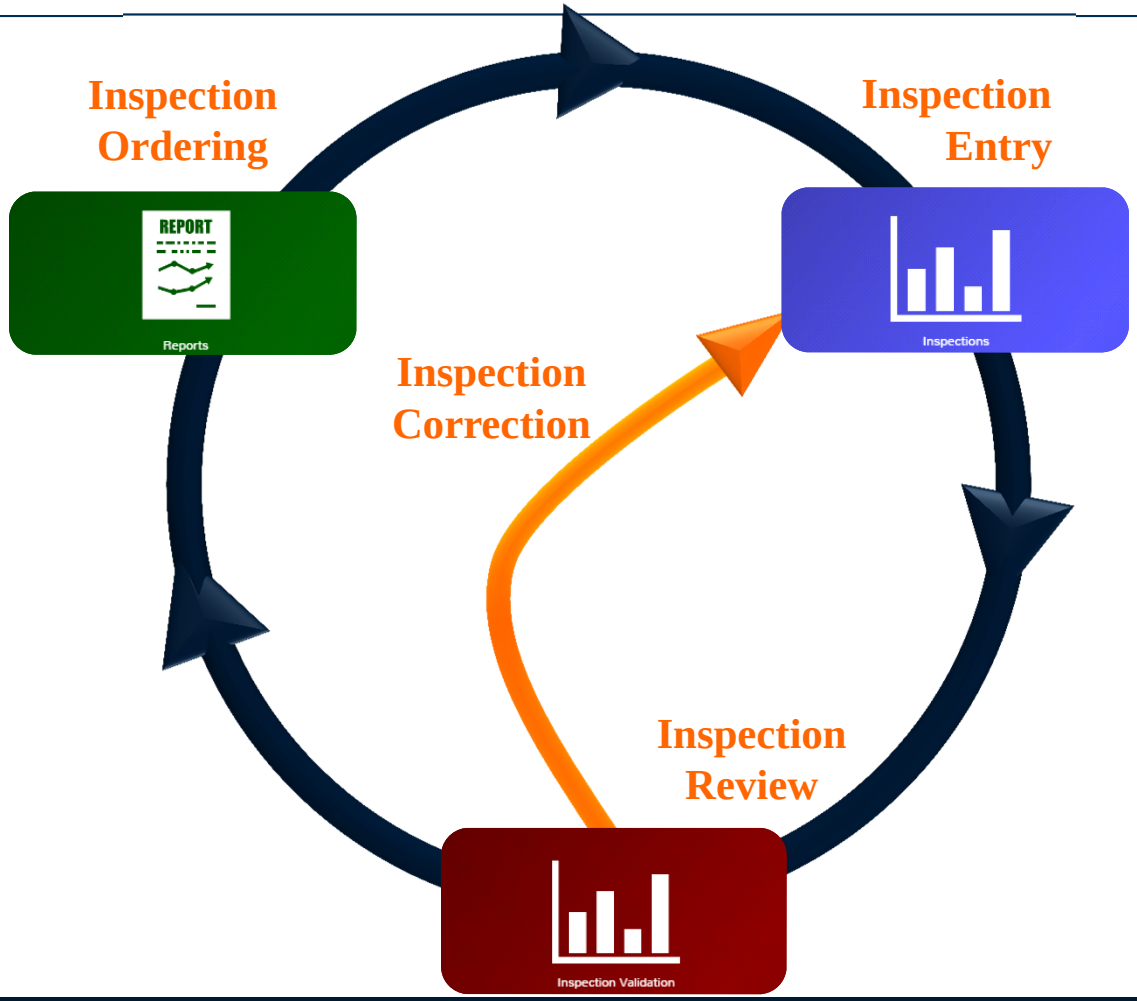
McCRACKEN
FINANCIAL SOLUTIONS CORP.

Tips for Configuring the Portal

Agenda

- Inspection Ordering Demo
- FEMA Widget
- Smart Reports
  - Delinquent Loan Report Widget & Investor
- Process Manager - Workflow
- Rule , Process and Document Checklist
- Financial Statements & Valuation
- Notes and Upload Documents
- Super Search
- Default Dashboard
- Browsing Tips an Configurations

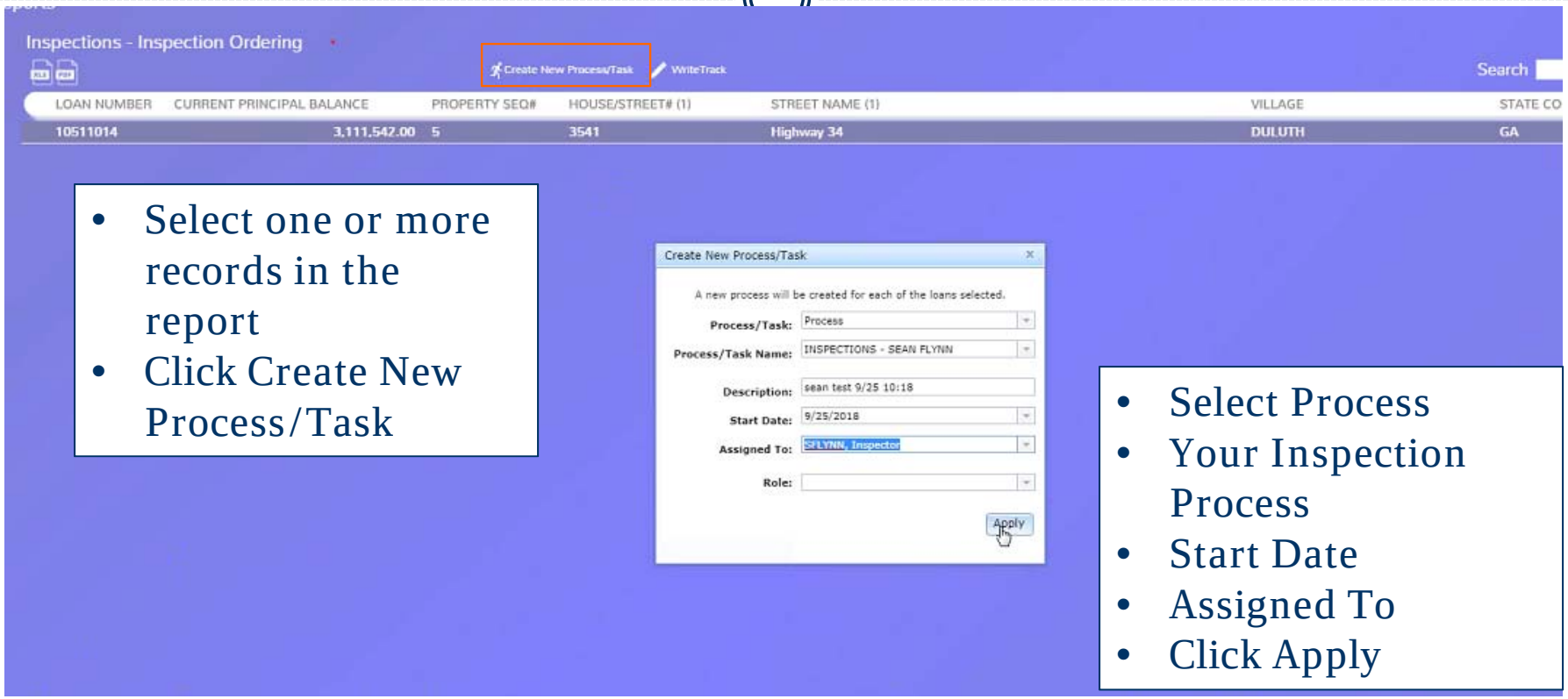
Inspection Ordering Demo


Inspection Ordering
REPORT
Reports
Inspection Entry
Inspections
Inspection Correction
Inspection Review
Inspection Validation

Start with an Ad Hoc Report

Apply date range to Next Inspection Date for inspection period you are ordering

Create Inspection Process from Report Result Set



- Select one or more records in the report
- Click Create New Process/Task

- Select Process
- Your Inspection Process
- Start Date
- Assigned To
- Click Apply

Inspection Ordering Work Queue

inspections Detail

Create New | Start | Complete | Waived | Inactive | Reassign Job Function | Reassign Role | Notes | Email

Status	Notes	Process Name	Task/Process Description	Start	Due	Related To	Assigned To
	P	- ABC Hotel/1542 Spring Drive, LAS VEGAS, NV		09/19/2018	10/01/2018	LOAN 109534 MULTIPLE (2)	SFLYNN, Inspector
	P	- MARTINGALE PLACE SW/445 MARTINGALE, GLEN ELLYN, IL		09/19/2018	10/01/2018	LOAN 50020002 MULTIPLE (2)	SFLYNN, Inspector
	P	- MEMORIAL GARDEN/111 LIES ROAD, CAROL STREAM, IL	VALIDATE INSPECTION FORM	09/19/2018	10/01/2018	LOAN 50020003 MULTIPLE (2)	SFLYNN, Inspector
		- MEMORIAL GARDEN/111 LIES ROAD, CAROL STREAM, IL	VALIDATE INSPECTION FORM	09/19/2018		LOAN 50020003 MULTIPLE (2)	SFLYNN, MFS MANAGER 2

Inspection Form

Ok | Apply | Cancel

McCRACKEN Financial Solutions Corp.

Standard Inspection Form

Investor Loan Number	50020023
Servicer Loan Number	0
Reviewed By	Abby Flynn
Property Type	OTHER (99)
Next Inspection Due Date	10/01/2019

I. Loan/Inspection Information

Servicer Name	MFS Coorespondent (12345678'	Overall Property Rating	EXCELLENT OVERALL CONDITION
Lender/Investor	Test Investor 702	Deferred Maintenance?	NO (N)
Borrower	daily 120 roll fwd acc follows dd	Date of Inspection	09/19/2018
Borrower Contact		Inspected By	Flynn Inspections
Contact Phone		Inspector Name	Sean Flynn
Prop Name	Memorial Garden	Rent Roll Attached	NO (N)
Property Address	111 Lies Road	Loan Balance	0.00
City	Carol Stream		
State	ILLINOIS (IL)	Zip Code	60189

General Comments for Subject Property

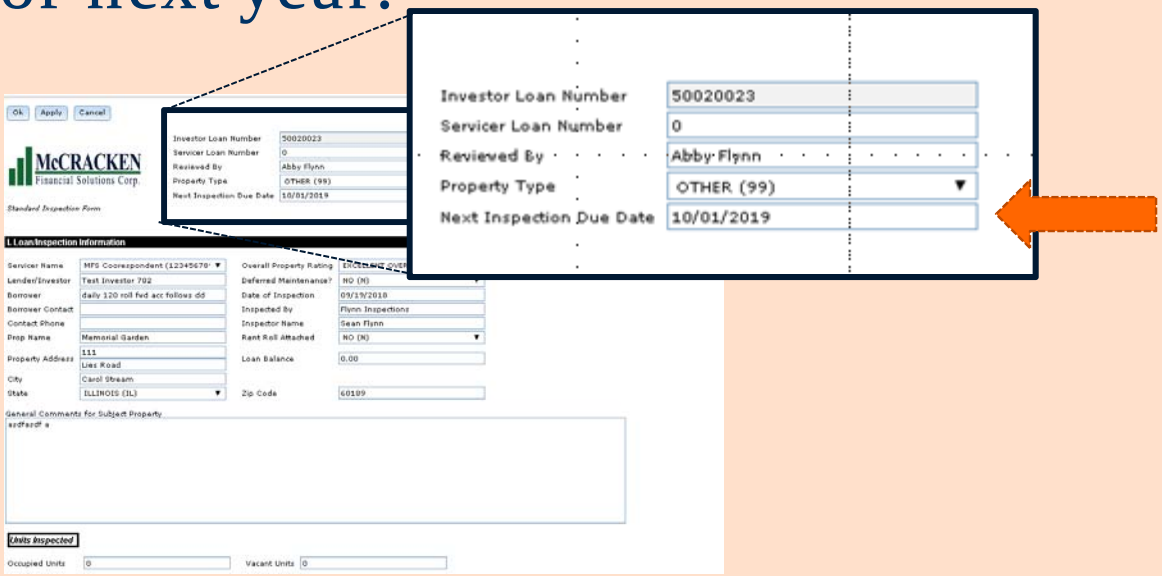
asdfasdf a

Units Inspected

Occupied Units	0	Vacant Units	0

Inspection Validation and Review

- Once you enter the next inspection date it will build the record for next year.



FEMA Widget

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FEMA Widget

- Feed from FEMA website
- Matches on County
- Identifies the properties in your database potentially impacted.
- When the user clicks on the widget it pulls the data from the FEMA website real time

FEMA Disaster Report

Search

Incident Type	Title	Declare Date	State	County	Incident Begin	Incident End	Hazmat Mitigation	Individual Assistance	Indiv/Household Assistance	Public Assistance	Properties Affe
Severe Storm(s)	TYPHOON MANGKHUT	2018-10-01	GU	GUAM	2018-09-10	2018-09-11	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	SCHUYLER	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	CHENANGO	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	CHEMUNG	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	BROOME	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	SENECA	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	DELAWARE	2018-08-13	2018-08-15	Yes	No	No	Yes	
Flood	SEVERE STORMS AND FLOODING	2018-10-01	NY	TIOGA	2018-08-13	2018-08-15	Yes	No	No	Yes	
Severe Storm(s)	TYPHOON MANGKHUT	2018-09-29	MP	SAIPAN	2018-09-10	2018-09-11	Yes	No	Yes	Yes	
Severe Storm(s)	TYPHOON MANGKHUT	2018-09-29	MP	TINIAN	2018-09-10	2018-09-11	Yes	No	Yes	Yes	
Severe Storm(s)	TYPHOON MANGKHUT	2018-09-29	MP	ROTA	2018-09-10	2018-09-11	Yes	No	Yes	Yes	
Hurricane	HURRICANE LANE	2018-09-27	HI	KAUAI	2018-08-22	2018-08-29	Yes	No	No	Yes	
Hurricane	HURRICANE LANE	2018-09-27	HI	HAWAII	2018-08-22	2018-08-29	Yes	No	No	Yes	
Hurricane	HURRICANE LANE	2018-09-27	HI	MAUI	2018-08-22	2018-08-29	Yes	No	No	Yes	
Fire	BALD MOUNTAIN FIRE	2018-09-21	UT	UTAH	2018-09-21		Yes	No	No	Yes	
Fire	ROOSEVELT FIRE	2018-09-18	WY	SUBLETTE	2018-09-18		Yes	No	No	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	FLORENCE	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	SUMTER	2018-09-08		Yes	No	No	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	DARLINGTON	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	CHESTERFIELD	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	MARLBORO	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	DILLON	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	DORCHESTER	2018-09-08		Yes	No	No	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	GEORGETOWN	2018-09-08		Yes	No	Yes	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	WILLIAMSBURG	2018-09-08		Yes	No	No	Yes	
Hurricane	HURRICANE FLORENCE	2018-09-16	SC	ORANGEBURG	2018-09-08		Yes	No	No	Yes	

This product uses the Federal Emergency Management Agency's API, but is not endorsed by FEMA.

Smart Reports

Delinquent Loan Report Widget

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Report Widget – Delinquent Loans

- This report widget displays any loan where the loan payment was not received by the due date.
- The widget displays the Loan Number, Borrower Name, Due Date for Delinquency, # of Days Delinquent, Current Balance, Property Name, Property City, Property State, Investor, Original Loan Date, Late Charge Eff Date, Servicer, Officer.
- Clicking a record opens the Loan Information Screen.
- Widget Features: Sort by Column Heading, Export to Excel®, Access the Loan Information Screen.

- Click to open widget
- Search the screen
- Download to a spreadsheet
- Click on a line and the Loan Information screen opens
- Close window

Delinquent Loan Report

Delinquent Loans

Search

Loan Number	Borrower Name	Due Date for Delinquency	# of Days Delinquent	Current Balance	Property	Property City	Property State	Investor	Original Loan Date	Late Chg Eff Date	Servicer	Officer
10510998	ROCKFORD HOUSING AUTHORITY	02/01/2008	2221	7,115,447	1125 Outland Street	LAKELAND	FL	502-River Investment	02/28/2003	02/05/2008	JOAN MCANANY	ASANI A
10511026	COUNTRY CLUB HEIGHTS PARTNERSHIP	02/01/2008	2221	2,145,138	1200 Shermer	ZION	IL	502-River Investment	05/21/2003	02/05/2008	GRELLA SUE	ASANI A
150076755	CAPTAIN QUARTER ASSOCIATES IV, L.P.	01/01/2008	2252	6,823,241	1478 Park Street	Winfield	IL	702-River Investments 702	07/01/2007	01/15/2008	CONVERSION	CONVERS
10020546	CONCORD DEVELOPMENT CORPORATION	01/01/2008	2252	8,440,421	31 Tunney Road	Hayward	CA	502-River Investment	08/07/2003	01/07/2008	JOAN MCANANY	ASANI A

Loan Information

Click on the record in Delinquent Loans widget

Loan Information

Loan Information [1]

Loan Number	109729	MS Loan Number	
Loan Name			
Investor	ABC Investment		
Lead Transacton ID		Investor Transaction ID	
Original UPB	1,300,000	Participation %	1.00000000000000
Current UPB	687,314	Master Servicer	
Note Date	06/21/1995	Primary Servicer	
Maturity Date	07/01/2005	Special Servicer	
Yield Maintenance End Date		Deal Sponsor name	
Interest Rate	9.0000000000000	Underwriter Name	
Interest Rate Type	FIXED RATE	Servicer	GRELLA SUE
Loan Purpose	NEW PURCHASE	Officer	SMYTH JOHN
Original Loan Term Yr/Mo	10/00	Asset Manager	
Remaining Loan Term Yr/Mo	0/00	Loss Sharing	
Interest Only Period		Modified Loan Share	
Interest Only End Date		Total Loss Sharing	
ACH N/Y	N	Current Risk Rating	
ACH Date		Rating as of Date	

Cross Collateralized/Defaulted

Cross Collateralized: No

Cross Defaulted: No

Alerts

Hold Code 1: Hold Code 2: Hold Code 3:

Contact Information [2]

Role	Name	Phone Number	E-mail Address
BORROWER	WWW HOLDINGS	1 877-307-5215	
CO-BORROWER	WIGGINS REALTY TRUST	1 877-307-5215	

Contact Log

Collateral Information [1]

Property Name	Russell Properties	Last Inspection Date	
Address	2588 Shadyway Blvd	Last Inspection Rating	
		Latest Total Appraised Value	8,210,000.00
MSA	26420	Latest NOI	1,297,636.61
Year Built	1980-01-01	Latest AN DSCR NOI-AB&C	3.0770400000000
Number of Stories	0	Latest AN DSCR NCF-AB&C	3.0534700000000
Number of Units	0	Latest AN DSCR as of Date	12/31/2013
Ttl Rentable SF(NRA)	69432	Recent Interim DSCR NOI-AB&C	
Gross Sq Footage	72266	Recent Interim DSCR NCF-AB&C	
Property Type		Recent Interim DSCR as of Date	
Other Description		UW DSCR NOI-AB&C	
Sp Characteristics		UW DSCR NCF-AB&C	

Escrow [0]

Escrow	Original Balance	Current Balance	Expiration

Payment Information [1]

	Billed Amount	Total Amount Due	Current Balance
Next Payment Due Date	01/01/2008		
Number of Payments Due	76		
Principal Due	0.00	610,376.86	687,314.39
Interest Due	577.03	222,955.53	
Tax Escrow Due	8,452.06	642,356.56	503,761.77
Insurance Escrow Due	0.00	0.00	0.00

P& I Payments Delinquent Rule

Delinquent P&I Pmnt	LOAN	Delinquent P&I Payments. Variable value: specify the minimum number of delinquent payments that should trigger designated actions. Logic: compare loan master number of payments	2	Display Alert	☑ Active	Watch List	Severe

Delinquent P&I Payments.

Variable value: specify the minimum number of delinquent payments that should trigger designated actions.

Logic: compare loan master number of payments delinquent PMASTR.CM#PDQ against rule detail numeric variable value PRURULED.RDVALUEN.

Report Widget Investor Information

Investor Information

Each column is sortable

Use Search in upper right of widget to limit what displays

Example:

Enter Fannie to search for Fannie investors

Download contents into a spreadsheet

Click on an Investor to see loans to that Investor

Investor Information

Investor #	Investor Name	# of Loans for Investor	Current Balance for Investor
501	ABC Investment	73	225,898,063
502	River Investment	43	207,706,076
702	Test Investor 702	260	206,417,112
800	FHLMC	4	189,381,995
600	Fannie Mae	10	188,362,300
24	GinnieMae MBS	4	161,547,065
504	Test Investor 504	34	126,903,042
900	GNMA non-MBS	3	101,980,124
503	Test Investor 503	21	91,781,885
512	Valley Investment	20	70,840,163
760	Test Investor 760	16	63,934,943
156	Finance Co	4	54,122,948
516	Test Invesotr 516	12	38,355,458
524	Test Investor 524	11	33,749,112
157	Finance Co - HF!	2	31,242,711
153	MC Bank	4	29,521,608
521	Test Investor 521	[illegible]	[illegible]
523	Test Investor 523		
531	Test Investor 531		
155	VN Bank	4	19,681,072

Search Fannie

Investor Information

Investor Information > 501...

Search

Loan Number	Rank	% of Investor's Portfolio	Investor's Current Balance	Investor's % Owned	Investor's Principal Purchased	Hold Code 1	Hold Code 2	Hold Code 3	Loan Balance
107329	1	13.453	30,391,291	60.000000000000	660,000	ESCROW ANALYSIS STOP [E]		LOST CHECK [L]	50,652,152
200000002	2	9.342	21,103,619	65.000000000000	7,426,250				32,467,106
200000001	3	8.142	18,394,205	50.000000000000	2,625,000	PAYOFF [P]	ESCROW ANALYSIS STOP [E]	ESCROW ANALYSIS STOP [E]	36,788,411
110682	4	5.364	12,117,645	100.000000000000	15,500,000				12,117,645
100044303	5	4.408	9,959,089	100.000000000000	10,000,000	PAYOFF [P]			9,959,089
109933	6	4.306	9,728,847	72.000000000000	12,744,000				13,512,288
110621	7	3.947	8,917,514	100.000000000000	10,300,000				8,917,514
110730	8	2.876	6,497,829	100.000000000000	8,000,000				6,497,829
100054302	9	2.656	6,000,000	60.000000000000	6,000,000	PAYOFF [P]			10,000,000
109834	10	2.351	5,311,633	53.846200000000	7,000,006				9,864,453
100044301	11	2.215	5,005,000	50.000000000000	5,000,000	PAYOFF [P]			10,010,000
100033701	12	2.213	5,000,000	50.000000000000	5,000,000				10,000,000
100044302	13	2.207	4,987,147	50.000000000000	5,000,000	PAYOFF [P]			9,974,294
100012401	14	2.199	4,969,093	83.333333333333	5,000,000				5,962,912
100054301	15	2.199	4,968,339	71.428571428571	5,000,000	PAYOFF [P]			6,955,675

Loan Information

Click on a Loan record in the Investor Information widget to open the Loan Information screen.

Loan Information

Loan Information [1]

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Yield Maintenance End Date		Deal Sponsor name	
Interest Rate	9.0000000000000	Underwriter Name	
Interest Rate Type	FIXED RATE	Servicer	GRELLA SUE
Loan Purpose	NEW PURCHASE	Officer	SMYTH JOHN
Original Loan Term Yr/Mo	10/00	Asset Manager	
Remaining Loan Term Yr/Mo	0/00	Loss Sharing	
Interest Only Period		Modified Loan Share	
Interest Only End Date		Total Loss Sharing	
ACH N/Y	N	Current Risk Rating	
ACH Date		Rating as of Date	

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Cross Defaulted: No

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Number of Stories	0	Latest AN DSCR NCF-AB&C	3.0534700000000
Number of Units	0	Latest AN DSCR as of Date	12/31/2013
Ttl Rentable SF(NRA)	69432	Recent Interim DSCR NOI-AB&C	
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Insurance Escrow Due	0.00	0.00	0.00

Other Reporting Widgets

Process Manager - Workflow

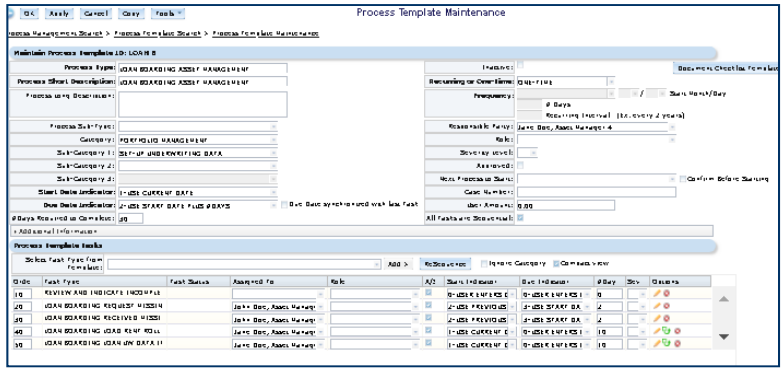
Create a Work Flow in Process Manager

Define business process

Build the business process & tasks in Process Manager

Use the business process

Task #	Describe the step (task) in the process
1	Review and indicate incomplete and/or missing documents
2	Loan Boarding request missing Loan Documents
3	Loan Boarding received missing Loans Documents
4	Loan Boarding Rent Roll into Rent Roll Portal
5	Loan Boarding Loan u/w data info Financials Portal
6	Loan Boarding Load Inspection data into Inspection Portal

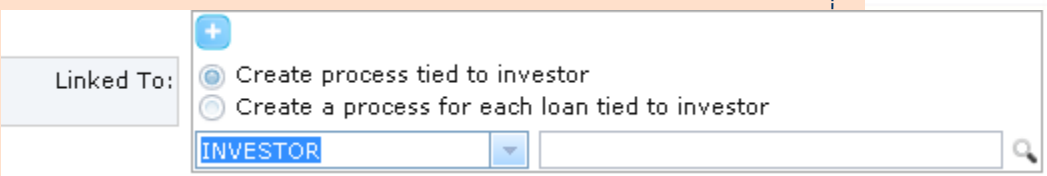


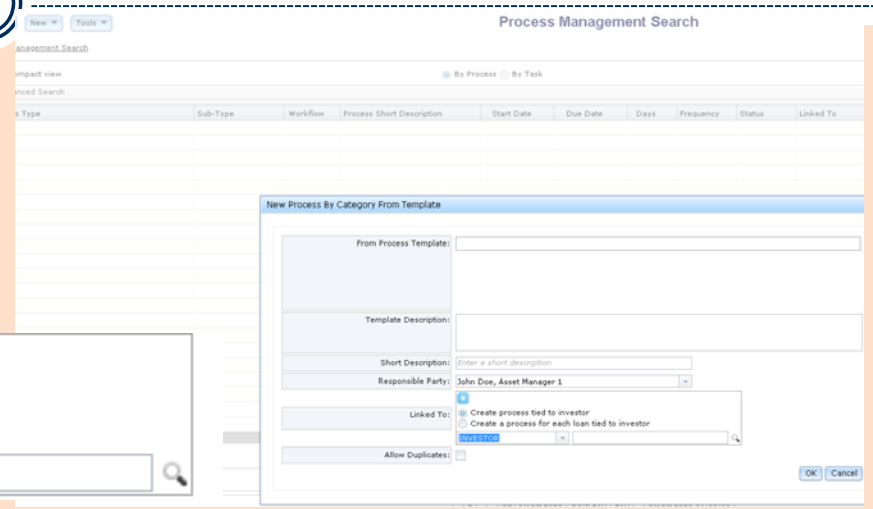
How to use the Business Process

Use a Rule	On Demand
• The system can monitor for the data condition to exist • The system will start the process and put it in the business person's work queue	• The business person can start a process on demand.

Start a Process On Demand in bulk

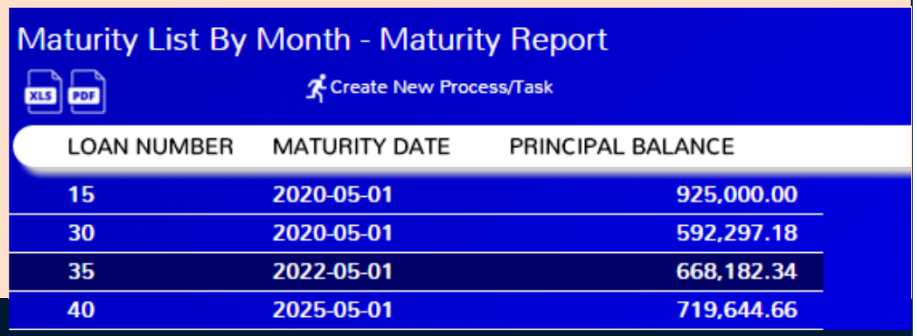
- Start a process on all loans for an Investor from Process Manager in bulk (e.g. if the investor has a hundred loans, it will instantly start 100 processes one for each loan)





Or

- Start a Process from a report using the report widget

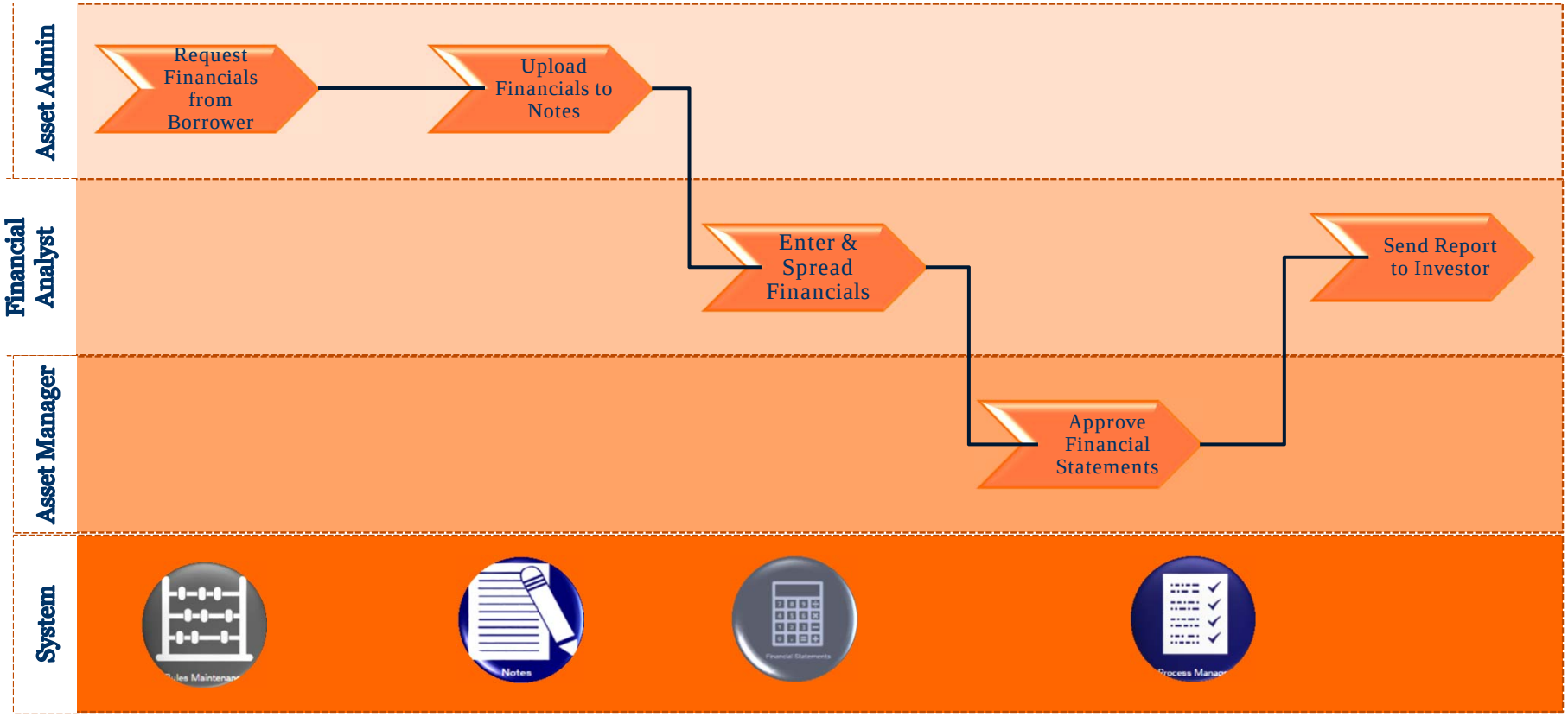


LOAN NUMBER	MATURITY DATE	PRINCIPAL BALANCE
15	2020-05-01	925,000.00
30	2020-05-01	592,297.18
35	2022-05-01	668,182.34
40	2025-05-01	719,644.66

Process & Task Queue Widget

	Start	Due	Related To	Assigned To	Days Left	Borrower	Property	Investor	Officer	MS Loan#	Investor Loan#
						MANAGEMENT CORPORATION					
ING ER	12/30/2014	01/01/2015	LOAN 444	Shari Smith, Asset Manager 1	-783	AMERRICA MANAGEMENT CORPORATION	Applegate Place	GinnieMae MBS [24]	CONVERSION	12345678	12232451-RE
M	01/02/2015	01/04/2015	LOAN 444	Shari Smith, Asset Manager 1	-780	AMERRICA MANAGEMENT CORPORATION	Applegate Place	GinnieMae MBS [24]	CONVERSION	12345678	12232451-RE
LL	01/05/2015	01/07/2015	LOAN 444	Shari Smith, Asset Manager 1	-777	AMERRICA	Applegate Place	GinnieMae MBS [24]	CONVERSION	12345678	12232451-RE

Rule & Process & Document Checklist



Rules Engine monitors Due Date, starts Process X days in advance of the Due Date.

Upload Financials to Process Notes

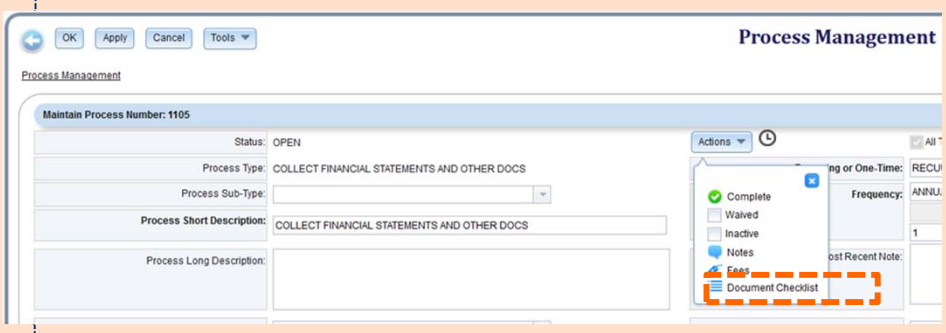
Financial Statement Application uses Forms to streamline spreading process

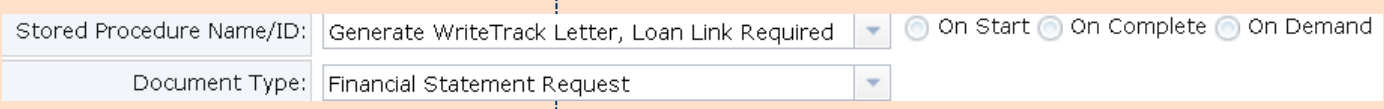
Process Manager Assigns work to different users or roles. Work appears in their queue.

Collect Annual Financial Statements

The System

- System monitors the Fiscal year on a Loan with the Rule.
- This rule looks for FS Annual Collectables - XX days after fiscal year end date (Rule 237)
- Example: When it is 90 days after the FYE the rule will trip and Build a process with a Document Check List
- Add a task to sends Letter or email





Document Checklist-Collectibles

Ok | Apply | Cancel | New

Proc Link Checklist (Process ID: 6707)

Final Package Received _____ Statement End Date

Document Type	Document Name	Due Date	Date Received	Link	Waived	Notes	Actions
RENT ROLL (RR)		04/30/2018					Select ▼
OPERATING STATEMENT (OS)		04/30/2018					Select ▼

Show: ☑ Active ☐ Received ☐ Not Received ☐ Waived ☐ All

Document Type: OPERATING STATEMENT (OS) ▼ Document Name: _____ Due Date: 04/30/2018 Date Received: _____

Source ◉ Notes Search ○ Notes Upload ○ External File _____

Search | Upload

Most Recent Note _____

Receive Financial Statement

Welcome Jane Doe

McCRACKEN Financial Solutions Corp.

Asset Manager 4

Powered by McCracken

Loan 200000001

CONF19DE

Financial Statements

Master 2 Maintenance

Ok | Apply | Cancel

Loan Mode Checklist Loan: 200000001

Final Package Received

Statement End Date

Process	Document Type	Document Name	Due Date	Date Received	Link	Waived	Notes	Actions
MODIFICATION (6707)	RENT ROLL (RR)		04/30/2018					Select ▼
MODIFICATION (6707)	OPERATING STATEMENT (OS)		04/30/2018					Select ▼

Show: ☑ Active ☐ Received ☐ Not Received ☐ Waived ☐ All

Document Type -- Document Name Due Date Date Received

Source ○ Notes Search ○ Notes Upload ○ External Link

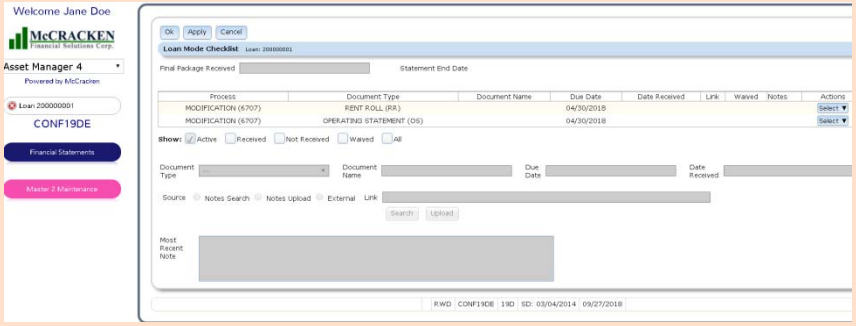
Search Upload

Most Recent Note

RWD | CONF19DE | 19D | SD: 03/04/2014 | 09/27/2018

The System

- System monitors the receipt of the Operating Statement with the Rule.
- FS Spreading Annual - Collectables marked received - operating statement/rent roll (Rule 240)
- Example: When documents are received the rule starts a process for the user to spread the Financials



Financial Statements & Valuation

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Financial Statement - Detail Entry

Loan Information

Loan Number	200000001	Investor	Commercial Investor 501 (501)	Investor Loan	692018	Fiscal Year End	12/31
Client Relations Mgr	DOE JANE [JD]	Processor Code	TOM GREEN [100]	Loan Type	A NOTE [A]	Original Loan Date	06/03/1998
Product Line	CMBS [CMB]	Product Line Detail 1		Product Line Detail 2		Source Code	MFS MORTGAGE [999]
Collateral ID	38	Property Name	Charter Oak Apartments (1)	Property Address	9785 Monica Lane Hartford, IL	Property Desc 1	COMMERCIAL [20]

View Detail | Property Maintenance

Back | Validate | Save | Delete | **Status:** IN PROGRES ▼ 08/17/2017 Currently viewing statement # 8: 01/01/2017 - 12/31/2017 - ANNUAL - PERIODIC STATEMENT - CREFC Lodging

Date sent to investor:

Loan Level Comments:

Income

Borrower Statement Line Item	Amount	Adjustment	Adjusted Amount	Map To Account	Adjustment Comment	Delete
Bad Debt	100,000.00	0.00	100,000.00	Other Income		
EGI (Effective Gross Income)	100,000.00	0.00	100,000.00			

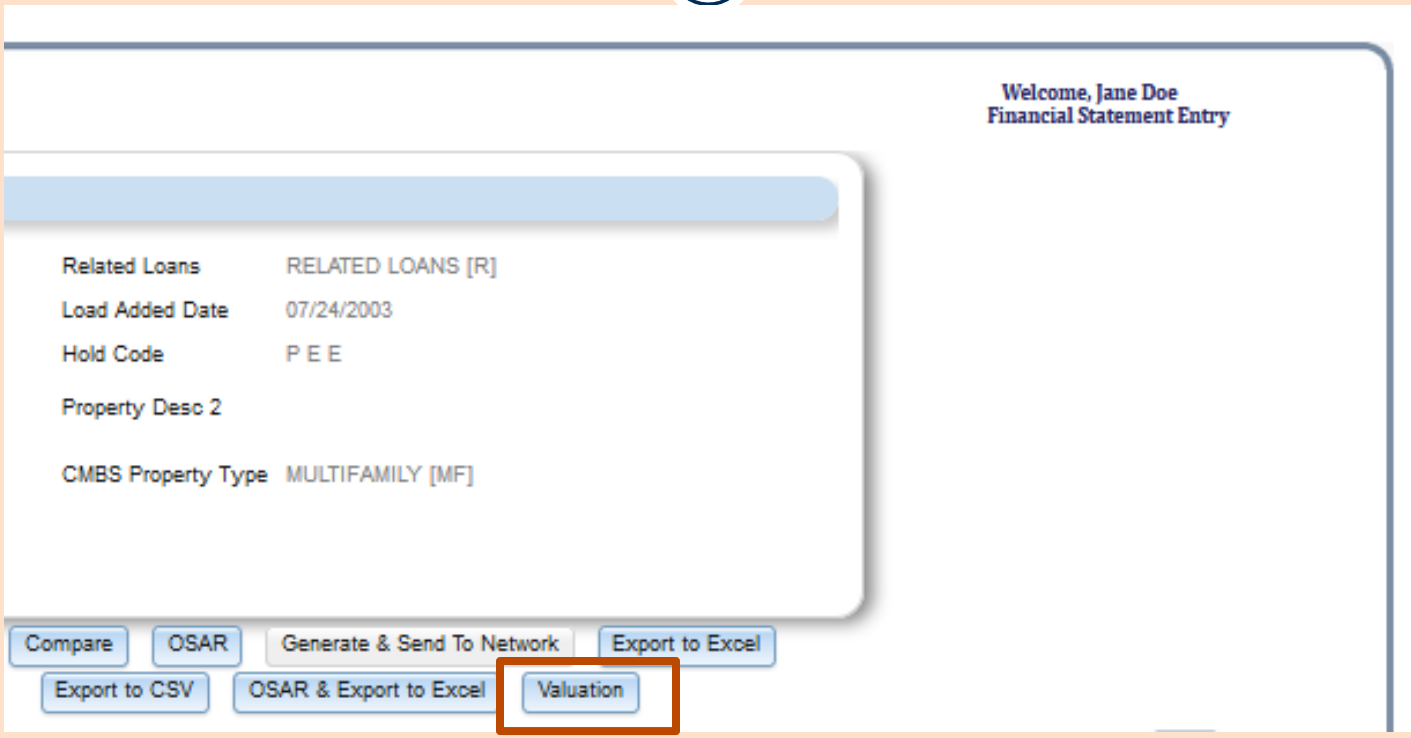
Expenses

Borrower Statement Line Item	Amount	Adjustment	Adjusted Amount	Map To Account	Adjustment Comment	Delete
Advertising & Marketing	50,000.00	0.00	50,000.00	Advertising & Marketing		
Total Expenses	50,000.00	0.00	50,000.00			
Net Operating Income (NOI)	50,000.00	0.00	50,000.00			
Management Fee/EGI Ratio	0.0000000000000		0.0000000000000			
Operating Expense Ratio	0.5000000000000		0.5000000000000			

Capital Items

Borrower Statement Line Item	Amount	Adjustment	Adjusted Amount	Map To Account	Adjustment Comment	Delete
	0.00	0.00	0.00			
Total Capital Items	0.00	0.00	0.00			
Debt Service Note(s) A. overridden	0.00		0.00			
Debt Service Note(s) B. overridden	0.00		0.00			
Debt Service Note(s) C. overridden	0.00		0.00			
Total Debt Service	0.00		0.00			

Financial Statement has a link to Valuation Widget



Financial Statement and Valuation

Valuation Detail

Ok | Apply | Cancel | Delete | Status IN PROGRESS (IP) | 11/17/2016 | There has been a change in the data that may impact the valuation. | Recalculate

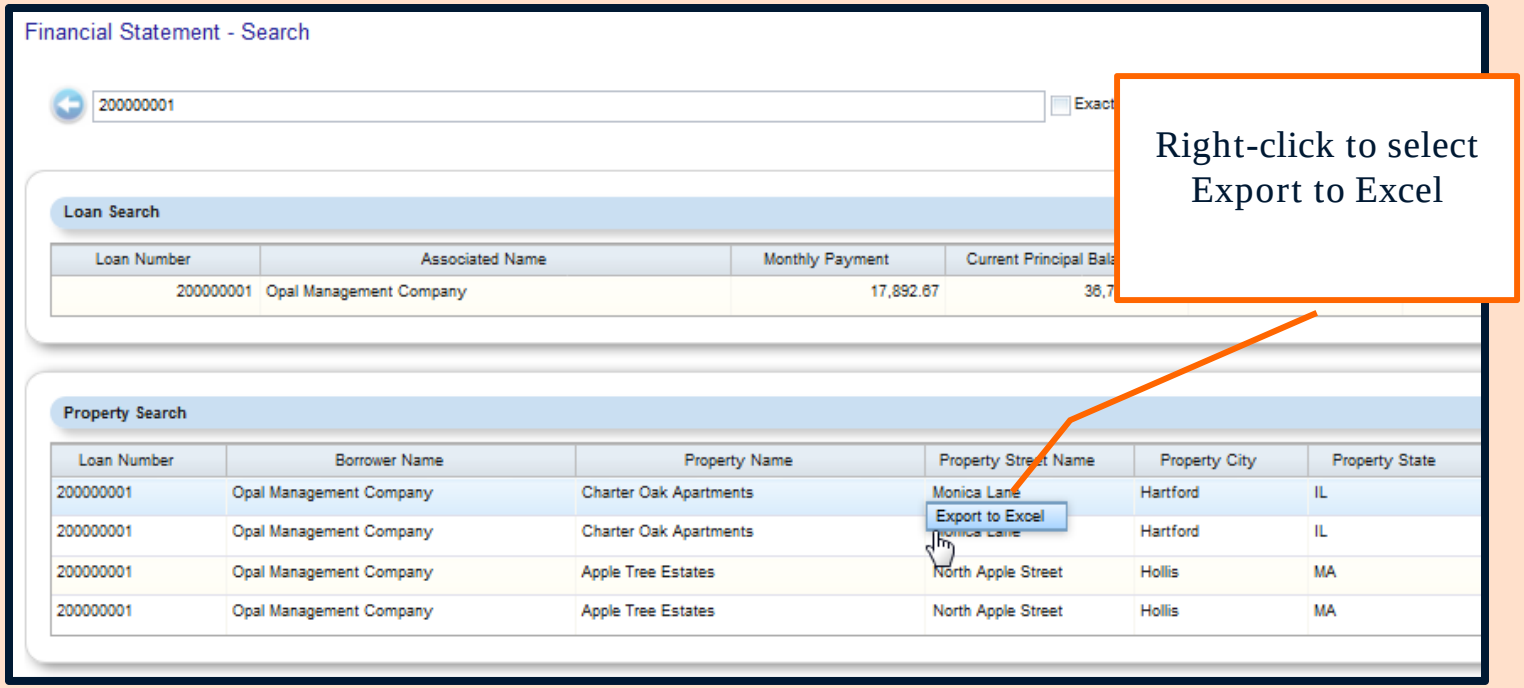
Capitalization Valuation

Associated Financial Statement - Statement Seq 6 - ANNUAL - 12/31/2011 - [PER]

Consolidated	N	Selected Cap Rate %	8.3	Effective Gross Income	16,087,000.00
Purpose of Valuation	RISK RATING (R)	Cap Rate Value	9,879,518.07	Effective Gross Income Metric	0.61
Valuation Date	01/18/2012	Per Unit	98,795.18	Created Date	11/17/2016
Property NOI	836,000.00	Per Square Foot	118.56	Created By	MFSDEMO1
NOI Adjustment	-16,000.00	Property Allocation	60	Approval Date	
Adjusted NOI	820,000.00	Allocated Loan to Value %	218.97	Approved By	
		Current Principal Balance	36,056,099.60		

Most Recent Note

Tip-Export grid to Spreadsheet



Right-click to select Export to Excel

Notes and Upload Documents

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Documents

- Document upload- support the following document types: Excel®, Word®, PDF, Photo, Email
- Size of document limit is 1 gigabyte
- Documents are uploaded in notes and denoted by

Searching Notes

Notes

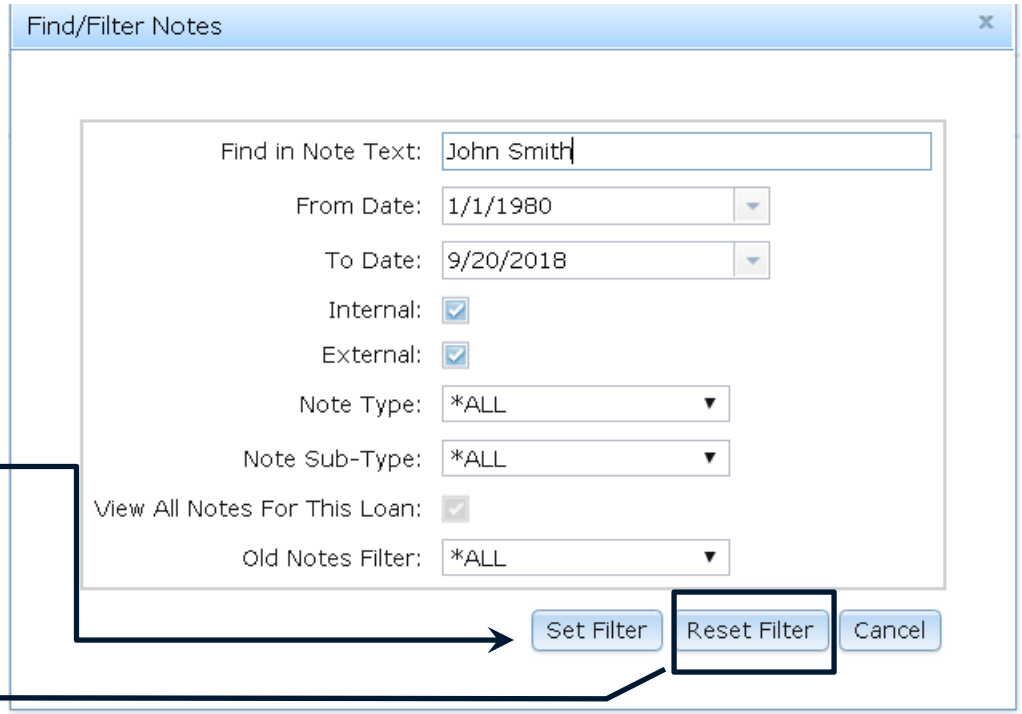
- To inactivate a note-Click on Note balloon
- To make a note with in a note- Click on the Note Balloon.
- This sub –note is denote by green shading.

Searching Notes

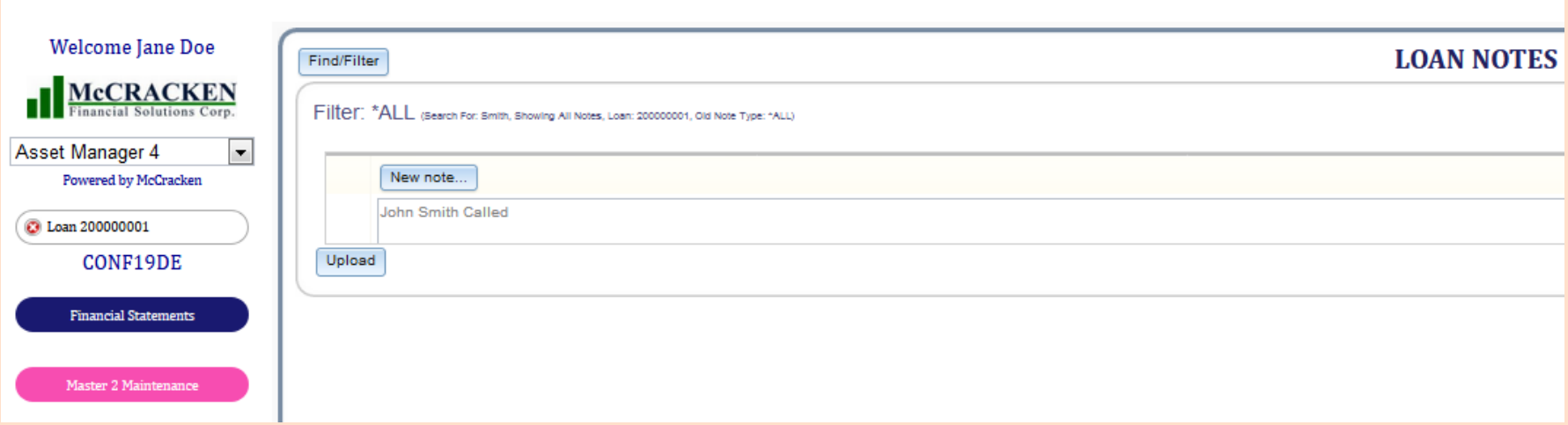
Change the filter for the search. Example: “I know John Smith called me on this but I don’t know when”

Click “Set Filter” to run search

Reset Filter returns it to the default search for the module

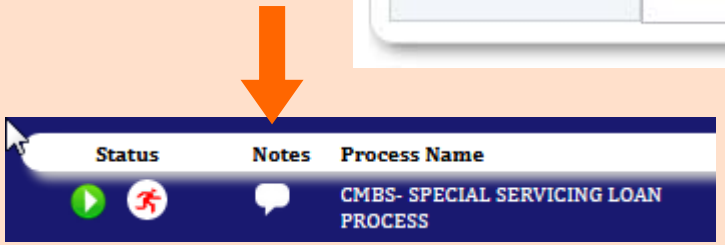


Results from Note Search



Note Indicators

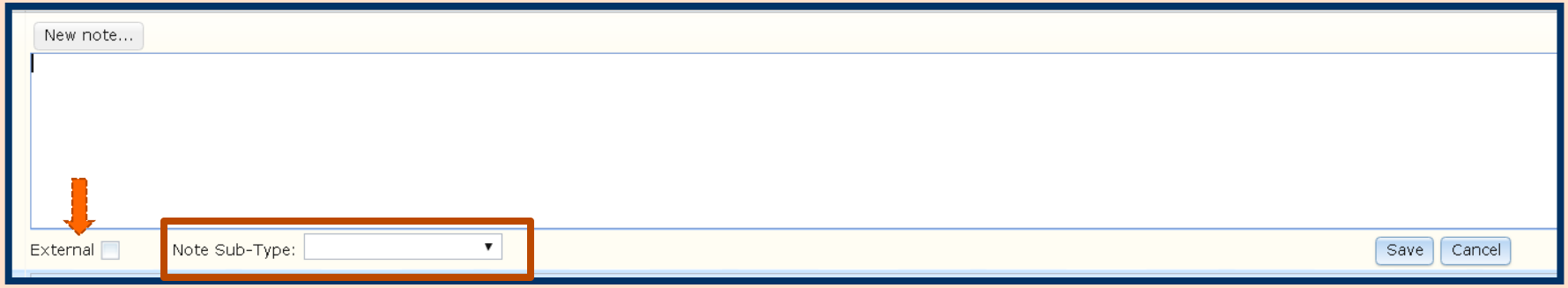
- Notes are available in the different modules
  - The module displays the Most Recent Note
  - Click in the Note field to open Notes
  - Click Refresh to display newest Note
  - Click Upload to attach documents



- This icon in the Process & Task Queue denotes there is an existing Process Note

Entering a Note

- Type your note, it will automatically tag with the module you are in
- Mark for External note – the default is internal
- Mark with a Note Sub-Type to further group notes- the default is blank



Super Search

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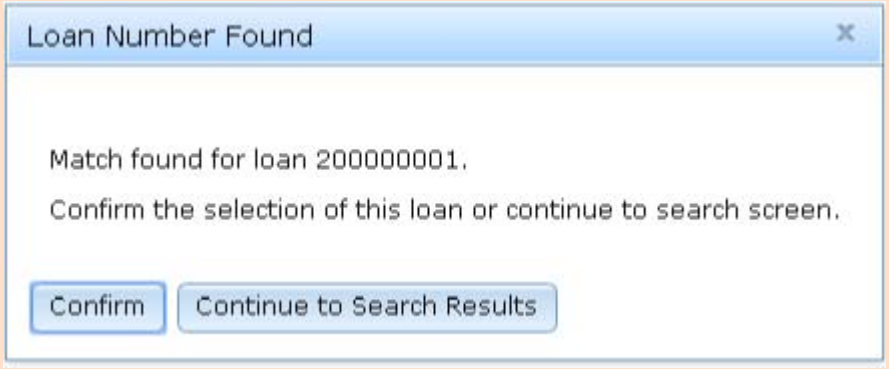
Super Search

- Super Search window allowing users to search for an Entity Name, Loan Number

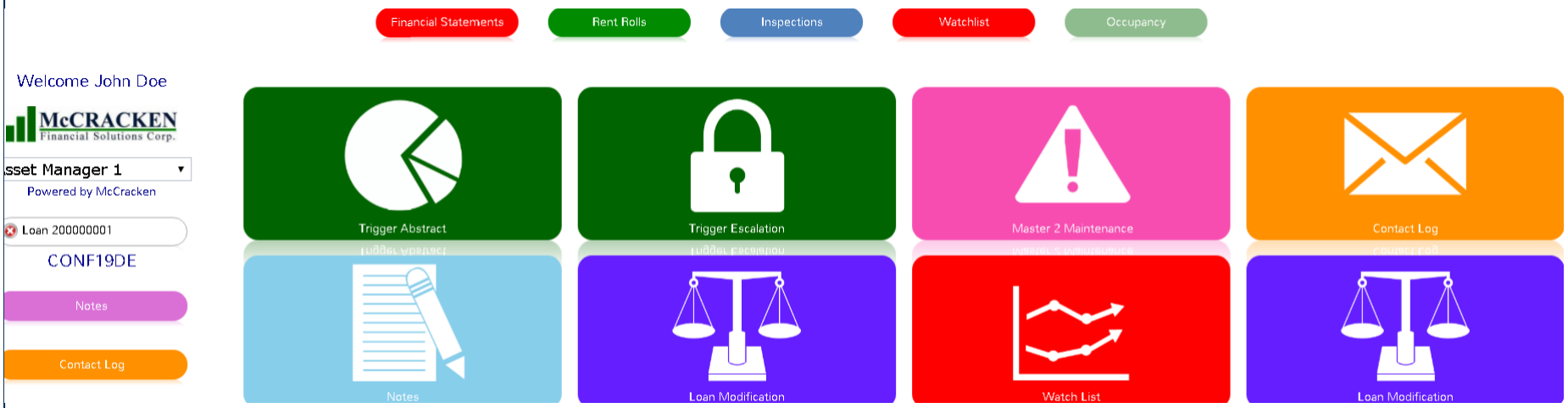
Super Search

- Enter Loan Number in search box
- Confirm this is the loan you want



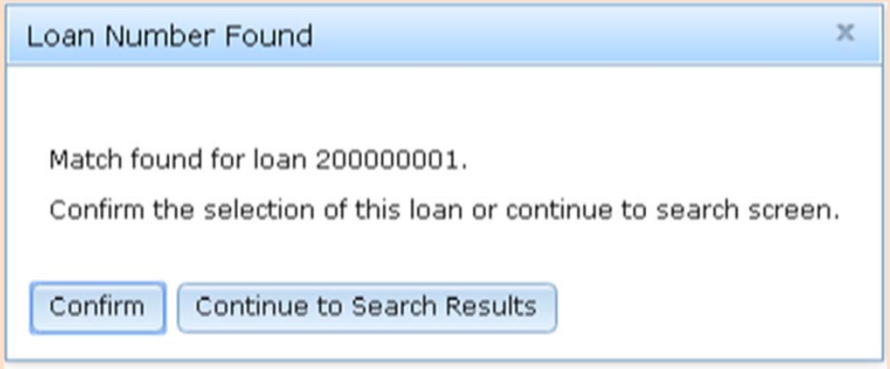
Super Search

The screen will show only widgets with data on this loan.



Super Search

When you select
"Continue to Search results"
Button it will navigate you to the screen below, then select the loan you want to view



Default Dashboard

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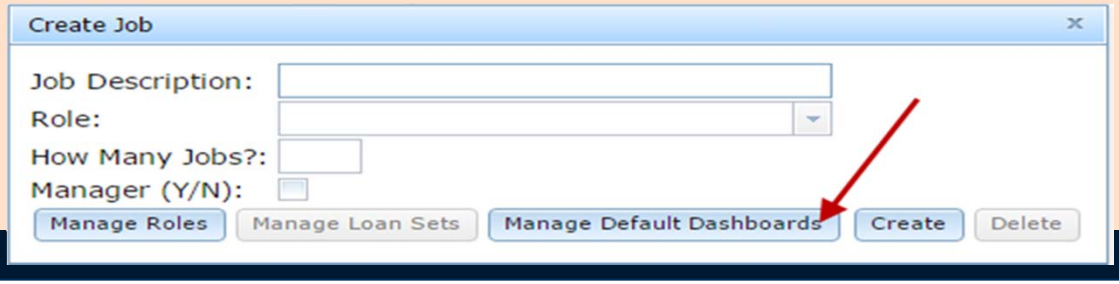
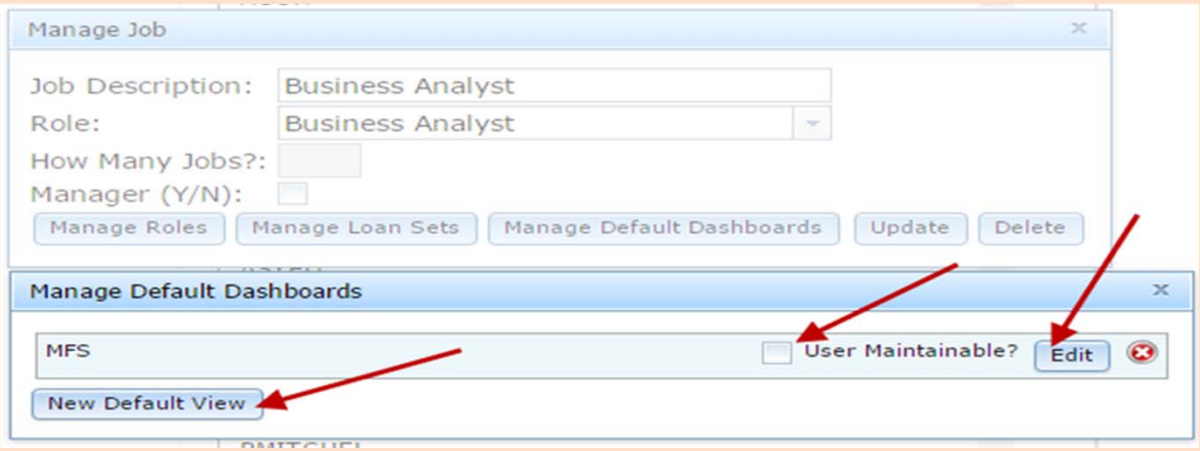
‘Create Job’ Options

- Manage Default Dashboards’ can be used to setup customized Portal Dashboards for Roles.
- Allows you to predefine default dashboards with related Widgets.
- TIP: Default Dashboards, if used, should be setup prior to creating the associated Job Function(s) and Role(s). Once a new Job Function is created and initially tied to the Default View, it will not overwrite the existing dashboard.



Default Dashboards (continued)

- Click on 'New Default View' to create new.
- Click on 'Edit' to change Widgets on existing dashboard defaults.

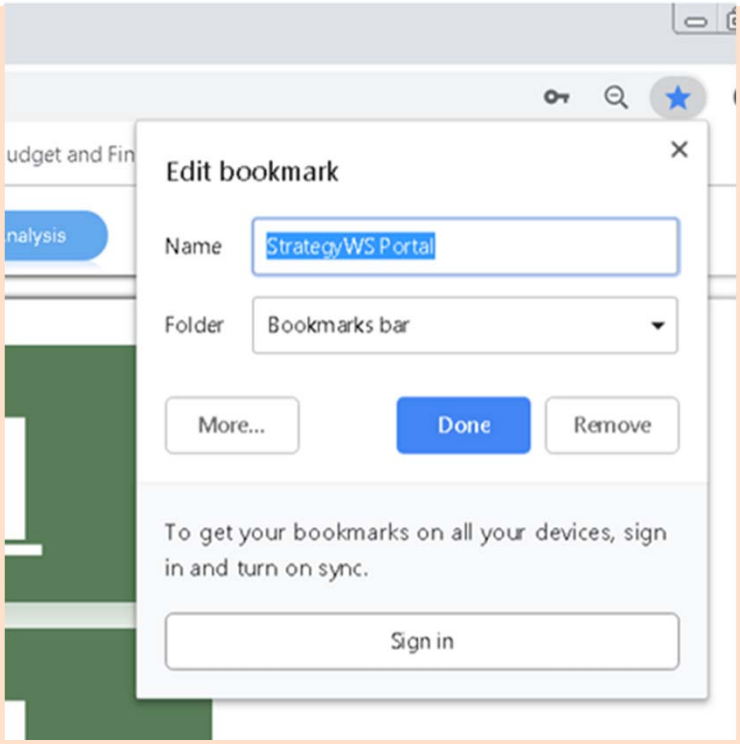


Default Dashboards (continued)

Browsing Tips and Configurations

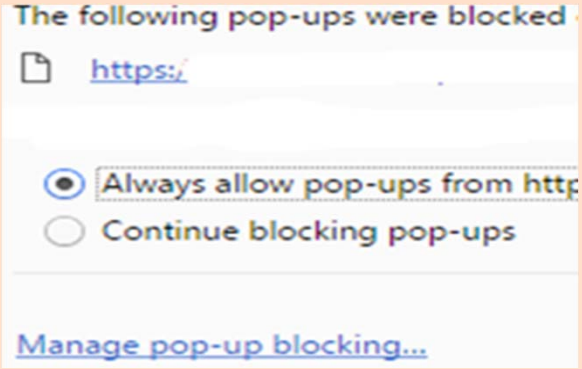
Save the Link in Your Favorites

- Create a bookmark by clicking on the star
- Fill out the Name
- Select Bookmarks Bar for you Folder
- Click Done
- The link is there when you need it.



Browser Tips

- Change browser setting to allow pop-ups from the Portal URL. The first time you select a Widget to 'Open in New Window' you might receive a pop-up blocker message alerting you to change the setting:



Browser Tips

- F11 key - Makes the screen full screen
- CTRL Key and '+' - Enlarges selected portion of the screen
- CTRL Key and '-' - Reduces selected portion of the screen
- CTRL Key and '0' - Restores the screen to the original size
- Zoom settings should from 90% to 100% for best viewing

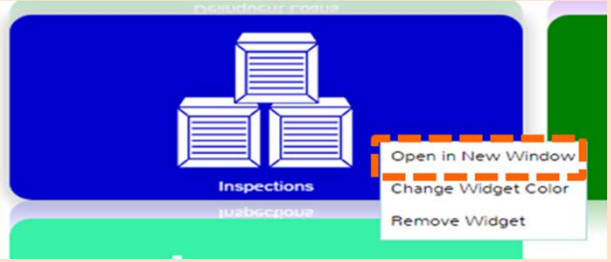
Browser Tips- Continued

Clearing History in Chrome

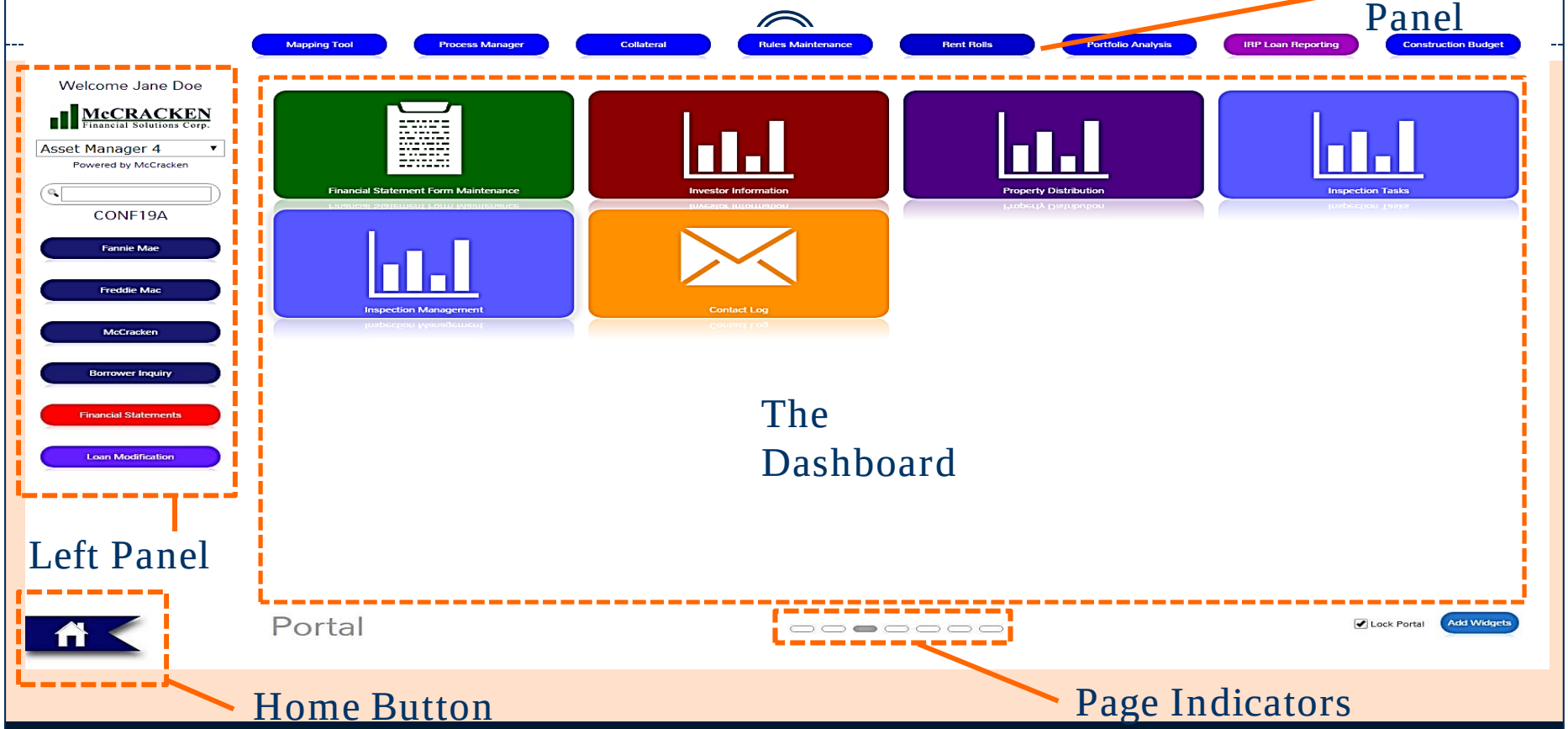
1. On your browser toolbar, tap More icon
2. Tap History, then tap Clear browsing data.
3. Under "Clear browsing data", select the tick boxes for Cookies and site data and Cached images and files.
4. Use the Time Range above Browsing history to select the amount of data that you want to delete.
5. Click the Clear Data button
6. Close the browser

Web Portal Dashboard

- Double click and open the app in the Dashboard.
- Top Panel and Left hand Panel still available
- Click Home to return to Dashboard
- Open a Widget by right clicking to open the app in a separate window
- Some applications are easier to navigate with the full window
- Close browser window when done.



Web Portal Dashboard -The Parts



Web Portal Dashboard

The Dashboard shows the following information:

- The number of pages of Widgets.
  - Ovals will appear in the center at the bottom of the dashboard in cases when there are multiple pages of Widgets.
  - The Current Page is represented by the filled in oval.

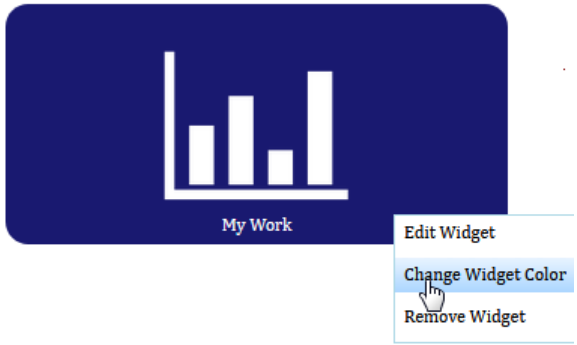
Web Portal Dashboard

Changing Pages

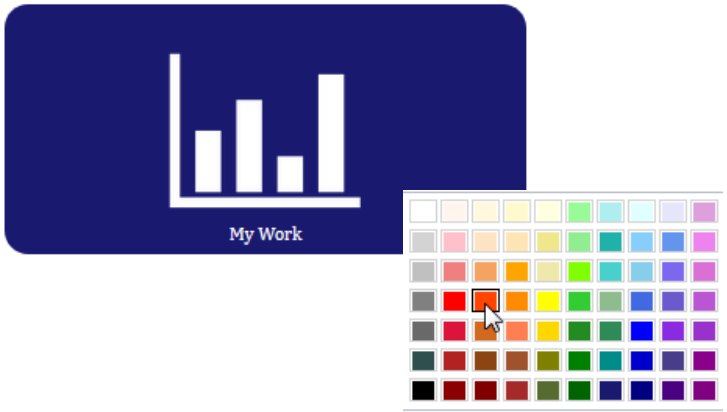
- To advance to the next page of Widgets or go back to a previous page, click the arrows on either side of the window.
- These arrows are only available when you move your cursor to either edge of the dashboard.

Changing the Color of a Widget

- Right click on the Widget to display the menu



- Click Change Widget Color. This will open the available color options. Select a new color and the Widget will be changed.



Add Widgets

- Go to the “widget store” and check it out

Questions?