



WEBINAR SERIES

Five Examples Using Process Manager

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Meet the team.



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Today you will learn:

1. How others are using Process Manager
2. Real world implementations and strategies
3. Functionality in Process and the Queue Widget

Before we begin, a few reminders.



Submit your
questions anytime.



The recording will
be on our website
within 48 hours.



Complete the
survey.

Our agenda.



Process & You: Real Processes from Real Customers



How Do I Get Started?



Processes, Tasks, Templating and More



Day In, Day Out

SECTION 1

Process & You: Real Processes from Real Customers



Process Manager & You: Real Workflows from Real Customers

Everyone wants work flow!

How you manage the work you are required to do (Workflow or Process Management) is important to:

- Your Rating Agencies
 - Your Auditors
 - Your Risk Management Group
 - Your Lenders
 - Your Investors
 - Your Agency
 - Your Master Servicer
 - Your Risk Management Group
- **And last but not least your Borrowers.**

Today, we will tell a story about the most valuable workflows our customers have created using Strategy's Process Manager.

By valuable I mean, something that has substantially improved their business operation, and improved customer satisfaction for borrowers, investors, and management.

What are customers raving about?

Customers Rave about Process Manager

Here is what they are saying.

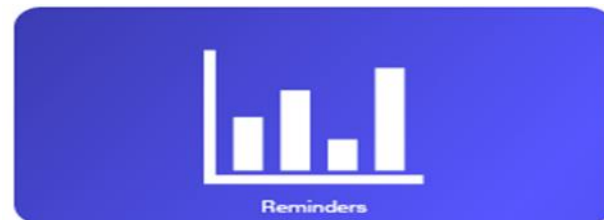
- “Strategy tells us what is due. The process tool has saved us from missing important reporting or other deadlines. It has helped us keep track of the big picture.”
- “Process provides transparency across the company and opened up good dialogue on the process itself. It can save us time.”
- A customer partnered with their Auditor to utilize Process and it has protected them during an audit. “Process let them (the auditor) know, the what and the when. This tool proves to the auditor the work item was completed.”
- “Process puts the power in the business user hands, doesn’t require technical assistance.”
- “Process easily assigns work.”
- “It is a simple way to remember and plan a critical annual requirement.”
- “It a simple way to remember and plan to do something in the future. I can set it up once and it will reoccur every month and I know it got done.”

1 -Reminders

- Background
 - Everyone has a way of reminding themselves.
- Why did this business person(s) want this ?
 - They needed a simple way to remember and plan to do something in the future.
- What does the tool accomplish for the business person?
 - Paperless -Traditionally you would write a reminder down on paper or put it in email or have a tracking sheet.
 - Typically a reminder has the “what” but you need to remember the ‘who’, the ‘when’ and the ‘how’. Process Manager keeps track of all of these.

Keeping it Real

- The Business Process Name
 - Reminder or Follow-up or Tickler Process
- What are the actual tasks
 - Reminder or Follow-up or Tickler Process













Reminders

- Here is the Reminders



Reminder Detail

Create New Start Complete Waived Inactive Reassign Job Function

| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To |
|--|-------|---------------------------------------|----------------|------------|------------|--|
|    | | CALL BORROWER TOMORROW | REMINDER | 08/05/2016 | 08/07/2016 |  LOAN 200000001 |
|    | | UPLOAD THE UCC REPORT | REMINDER | 10/18/2016 | 10/20/2016 | |
|    | | Register for the McCracken Conference | REMINDER | 10/18/2016 | 10/20/2016 | |

2 – Annual Compliance Business Process

- Background
 - A Servicing Agreement requires your company to provide annual compliance documents.
- Why did this business person(s) want this ?
 - They want a central location to track the annual compliance activities.
 - It is a simple way to remember and plan to do something in the future.
 - You can set it up once and it will reoccur every year.
- What does and Annual Compliance Workflow accomplish?
 - Paperless tracking – eliminated emails, reports, and multiple spreadsheets
 - Automatically tells you ‘what’ ‘who’, ‘when’, and ‘how’.
 - Provides a central location where the system keeps track of all of the requirements and work performed.
 - Recurs on the same dates every X years (using Float Year)
 - Tie the process to your investor or your company























Keeping it Real

- The Business Process Name
 - Annual Compliance (for your company)
- What are the actual tasks:
 - Annual internal audit
 - Annual Company Financial Statements
 - Annual Compliance certificate
 - Reg. AB or USAP Audit(prepared by CPA)



Annual Compliance Process

- Here is the Process and Task Queue showing the Annual Compliance Process
- The reoccurring reminders appear in the Process & Task widget when do.
 - You define the work that shows in the Process & Task Queue, this example shows all Compliance Detail work.
 - You could have separate widgets for Lender/Master Certification and an Annual Compliance work if you wish.

| Compliance Detail   | | | | | | | | |
|--|---|-----------------------------------|-------------------------------|------------|------------|--------------------------------------|--|-----------|
|  Create New  Start  Complete  Waived  Inactive  Reassign Job Function  Reassign Role  Notes  Email  View Process | | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | Assigned To | Days Left |
|  |    | LENDER/MASTER CERTIFICATION | REPORT | 04/01/2016 | 04/10/2016 | Commercial Investor 501 MULTIPLE (2) | Jane Doe, Asset Manager 4 | -190 |
|  |  | LENDER/MASTER CERTIFICATION | REPORT | 07/10/2016 | 07/19/2016 | Commercial Investor 501 MULTIPLE (2) | Jane Doe, Asset Manager 4 | -90 |
|  |  | ANNUAL COMPLIANCE FOR OUR COMPANY | ANNUAL COMPLIANCE CERTIFICATE | 03/15/2016 | 06/30/2016 | Commercial Investor 501 MULTIPLE (2) | Jane Doe, Asset Manager 4, (Role) COMPLIANCE | -109 |
|  |  | ANNUAL COMPLIANCE FOR OUR COMPANY | ANNUAL COMPLIANCE CERTIFICATE | 01/15/2016 | 06/30/2016 | Commercial Investor 512 | Jane Doe, Asset Manager 4, (Role) COMPLIANCE | -109 |

3 -Deal Review Process


























- Background
 - The Special Servicer is contractually obligated through a serving agreement to do certain activities by a certain date.
- Why did this business person(s) want this?
 - They wanted a better way to track the activities, centralize their work, and demonstrate they are meeting their service levels.
- What does the Deal Review Process do for the special servicer?
 - Strategy monitors and tells them when an item is due, so no deadlines are missed.
 - The Process and Task Queue gives them one place to view the details of what has been done (notes, documents, due dates, and completion dates).
 - The Process and Task Queue provides a structured loan by loan review of the details during the committee meeting.

Keeping it Real

- The Business Process Name
 - The Deal Review Process
- What are the actual tasks:
 - Prepare and Review Asset Summary Report
 - Prepare and Review APPRAISAL/BOV (Broker Opinion of Value)
 - Prepare and Review Property Inspection
 - Prepare and Review Comparative Financial Statement
 - Prepare and Review OSAR/NOI Workbook (Operating Statement Analysis Report(OSAR) Net Operating Income (NOI)



Deal Review Process & Task Queue

| Special Serviced Deal ...   | | | | | | | |
|---|---|--------------------------------------|----------------------|------------|------------|---|--------------------------------------|
|  Create New  Start  Complete  Waived  Inactive  Reassign Job Function  Reassign Role  Notes | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | Assigned To |
|   |   | CMBS- SPECIAL SERVICING LOAN PROCESS | APPRAISAL/BOV | 10/21/2016 | 10/21/2017 |  LOAN 109534 | John Doe, Asset Manager 1, (Role) AM |
|   |    | SPECIAL SERVICING LOAN PROCESS | ASSET SUMMARY REPORT | 01/10/2017 | 05/10/2017 |  LOAN 200000001 MULTIPLE (2) | John Doe, Asset Manager 1, (Role) AM |
|   |  | CMBS- SPECIAL SERVICING LOAN PROCESS | ASSET SUMMARY REPORT | 10/21/2016 | 10/21/2017 |  LOAN 200000002 | John Doe, Asset Manager 1, (Role) AM |

4 -Trigger (Monitoring Loan Covenants)



























- Background
 - What is a Trigger? Monitoring of loan covenants to mitigate against poor borrower or collateral performance that can detract from the creditworthiness of a loan. Each Loan may have 1 to 10 loan covenants. This is 40,000 thing to monitor.
 - Why did this business person(s) want this?
 - To automate the review of triggers based on contractual obligations. Centralize activity, notes and documents related to activities.
 - What does Trigger Monitoring accomplish?
 - There are 48 delivered processes defined and ready
 - Improves the visibility of loan covenants
 - Automatically assigns tasks
 - Centralizes work
 - Improves data integrity
 - Improves overall risk management and the health of the portfolio.

Keeping it Real

- The Business Process Name
 - Portal Trigger Abstract (there are 48 delivered processes in total)
- What are the actual tasks:
 - Prepare Abstract
 - Confirm All Required Reserve Deposits Were Received & Monthly Constants Are In Place
 - Confirm All Related Debt Appears On Abstract
 - Start Quality Control review.



Portal Trigger Abstract

| Trigger identification D...   | | | | | | | |
|--|-------|-------------------------|------------------|------------|------------|---|--|
| Create New  Start  Complete  Waived  Update Product ID  Update ID Group  Inactive  Reassign | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | |
|    | | PORTAL TRIGGER ABSTRACT | PREPARE ABSTRACT | 02/09/2017 | 04/10/2017 |  LOAN 15 | |
|    | | PORTAL TRIGGER ABSTRACT | PREPARE ABSTRACT | 02/03/2016 | 04/03/2016 |  LOAN 109534 | |
|    | | PORTAL TRIGGER ABSTRACT | PREPARE ABSTRACT | 02/03/2016 | 04/03/2016 |  LOAN 109546 | |
|     | | PORTAL TRIGGER ABSTRACT | PREPARE ABSTRACT | 02/03/2016 | 04/03/2016 |  LOAN 109581 | |











Rules -Intelligence Engine

Proactive monitoring of your entire portfolio

- Monitor for any risk indicators and covenants to ensure the health of the loan
- Example: when an NOI drops below a certain level – how do you know? The ‘engine’ will tell you so you can resolve it
- Automatically performs actions when indicators identified
 - Displays alerts
 - Emails to notify appropriate parties
 - Creates letters to notify borrowers, property managers, etc.
 - Starts user defined processes to mitigate risk
- Eliminates manually pouring over reports for dates and multiple risk factors

Trigger (Monitoring Loan Covenants)

- Sample of the 48 delivered process:
 - Borrower/Guarantor Files Bankruptcy
 - Credit Rating Below Target (BWR/GTR)
 - Debt Yield Falls Below Threshold
 - Decline in Credit Rating of Swap Counterparty
 - DSCR Falls Below Threshold
 - Event of Default (BWR Reps)
 - Event of Default (Generic)
 - Loan not Paid Off at Maturity/ARD
 - Tenant Does Not Renew (Date)
 - Tenant 'Goes Dark'
 - Tenant Terminates Lease/Receives Pymt

| Trigger Monitoring Detail | | | | | | | |
|---|---|------------------------------|---|------------|------------|---|--|
| Create New Start Complete Waived Inactive Reassign Job Function Reassign Role Note | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | |
|   |    | TENANT DOES NOT RENEW (DATE) | DETERMINE NOTICE RENEWAL DATE | 10/20/2015 | 12/19/2015 |  LOAN 109534 | |
|   |  | TENANT "GOES DARK" | CONFIRM OCCUPANCY, VIA PHONE TO BUSINESS OR EMAIL TO BORROWER | 04/28/2016 | 06/27/2016 |  LOAN 109534 | |








































5 –New Loan Boarding - Asset

- Background
 - A loan closes and is handed off to servicing for loan boarding. The servicer/lender must complete series of activities to get ready for the next 3650 days (10 years) or what ever the term the loan is.
- Why did this business person(s) want this?
 - They wanted to automatically assign the work to board the Asset Management information as soon as possible after closing.
 - Centralized way to tracking the on going work needed and completed.
- What does the New Loan Boarding Process accomplish for the business person?
 - The system automatically puts the work in the user's Process and Task Queue using a New Loan Rule
 - Users can attach the documents to the Process making them available to everyone.
 - Store documents at McCracken or in your internal document management system.
 - They know what is missing and what is done.

Keeping it Real

- The Business Process Name
 - New Loan Boarding - Asset Process
- What are the actual tasks:
 - Review And Indicate Incomplete and/or Missing Documents
 - Loan Boarding Request Missing Loan Documents From Closer
 - Loan Boarding Received Missing Loan Documents From Closer
 - Loan Boarding Loan U/W Data Into Operating Statement Application
 - Loan Boarding Load Rent Roll Into The Rent Roll Application
 - Loan Boarding Load Inspection Data Into Inspection Application

New Loan Boarding- Asset

| New Loan Boarding- A...   | | | | | | | |
|---|---|--------------------------------|---|------------|------------|--|---------------------------|
|  Create New  Start  Complete  Waived  Inactive  Reassign Job Function  Reassign Role  Notes  Email | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | Assigned To |
|    | | LOAN BOARDING ASSET MANAGEMENT | LOAN BOARDING LOAD RENT ROLL INTO THE RENT ROLL APPLICATION | 01/29/2016 | 02/28/2016 |  LOAN 445 | Jane Doe, Asset Manager 4 |
| |     | LOAN BOARDING ASSET MANAGEMENT | LOAN BOARDING REVIEW LOAN DOCUMENTS | 01/07/2015 | 01/25/2015 |  LOAN 20000005 | Jane Doe, Asset Manager 4 |
|    |    | LOAN BOARDING ASSET MANAGEMENT | LOAN BOARDING LOAD RENT ROLL INTO THE RENT ROLL APPLICATION | 01/27/2016 | 02/26/2016 |  LOAN 200000001 | Jane Doe, Asset Manager 4 |
|    |    | LOAN BOARDING ASSET MANAGEMENT | LOAN BOARDING LOAD RENT ROLL INTO THE RENT ROLL APPLICATION | 01/27/2016 | 02/26/2016 |  LOAN 200000002 | Jane Doe, Asset Manager 4 |
|    |  | LOAN BOARDING ASSET MANAGEMENT | LOAN BOARDING LOAD RENT ROLL INTO THE RENT ROLL APPLICATION | 01/27/2016 | 02/26/2016 |  LOAN 200000003 | Jane Doe, Asset Manager 4 |

Popular Business Processes

- Customers have built over 130 different Process Templates that we know of...
- These monitor:
 - Financial Statement Collection and Important Data Points
 - Inspections Due, Ratings, and Deferred Maintenance
 - Environmental Info or Property Changes
 - Tenant, Rent Roll and Property Management Changes
 - Various Escrow Requirements
 - ✦ Analysis due
 - ✦ Monitor reserves
 - ✦ Tax and Insurance Requirements
 - ✦ Insurance Requests and Compliance
 - Servicing Tasks

Popular Business Processes

| Template Name | Category |
|---|-----------------------------|
| AUDITED ANNUAL FINANCIAL STATEMENT | Asset - Financial Stmtms |
| BUDGETED CAP EX NOT COMPLETED | Asset - Financial Stmtms |
| COLLECT FINANCIAL STATEMENTS AND OTHER DOCS | Asset - Financial Stmtms |
| DSCR FALLS BELOW THRESHOLD | Asset - Financial Stmtms |
| DSCR FALLS BELOW THRESHOLD (DATE) | Asset - Financial Stmtms |
| DSCR NOI FALLS BELOW TARGET | Asset - Financial Stmtms |
| DSCR TRIGGER REVIEW | Asset - Financial Stmtms |
| ENERGY METRIC COVENANT | Asset - Financial Stmtms |
| FINANCIAL STATEMENTS COLLECTION | Asset - Financial Stmtms |
| GROSS SALES REVENUE BELOW THRESHOLD | Asset - Financial Stmtms |
| NOI FALLS BELOW THRESHOLD | Asset - Financial Stmtms |
| SPREAD OPERATING STATEMENT | Asset - Financial Stmtms |
| ANNUAL INSPECTION | Asset - Inspection/Deferred |
| COLLECT INSPECTION | Asset - Inspection/Deferred |
| COMPLETION REPAIR | Asset - Inspection/Deferred |
| DEFERRED MAINTENANCE | Asset - Inspection/Deferred |
| DEFERRED MAINTENANCE NOT COMPLETED | Asset - Inspection/Deferred |
| INSP. FOLLOW-UP; DEFERRED MAINT LIFE SAFETY | Asset - Inspection/Deferred |
| INSP. FOLLOW-UP; DEFERRED MAINT NON LIFE SAFETY | Asset - Inspection/Deferred |
| INSPECTION MANAGEMENT | Asset - Inspection/Deferred |
| INSPECTION ORDERING | Asset - Inspection/Deferred |
| INSPECTION TRAILER USING MAPPING TOOL | Asset - Inspection/Deferred |
| O&M NOT COMPLETED | Asset - Inspection/Deferred |
| OBTAIN CERTIFICATE OF OCCUPANCY | Asset - Inspection/Deferred |
| POOR INSPECTION RATING | Asset - Inspection/Deferred |
| POOR INSPECTION RATING (DATE) | Asset - Inspection/Deferred |
| REQUIRED REPAIRS | Asset - Inspection/Deferred |

| Template Name | Category |
|--|------------------------------------|
| CHANGE TO PROPERTY | Asset - Other |
| ENVIRONMENTAL REMEDIATION NOT COMPLETED | Asset - Other |
| LOAN BOARDING ASSET MANAGEMENT | Asset - Other |
| UCC RENEWAL PROCESS | Asset - Other |
| CHANGE IN PROPERTY MANAGEMENT | Asset - Tenant/Rent Roll/Prop Mgmt |
| COMMERCIAL LEASE REVIEW | Asset - Tenant/Rent Roll/Prop Mgmt |
| CO-TENANCY CLAUSE/ABILITY TO TERMINATE | Asset - Tenant/Rent Roll/Prop Mgmt |
| CREDIT TENANT PROCESS | Asset - Tenant/Rent Roll/Prop Mgmt |
| DEFAULT UNDER LEASE | Asset - Tenant/Rent Roll/Prop Mgmt |
| LEASE / SNDA | Asset - Tenant/Rent Roll/Prop Mgmt |
| LEASE EXPIRATION- NON RENEWAL OF KEY TENANTS | Asset - Tenant/Rent Roll/Prop Mgmt |
| MANAGEMENT AGREEMENT DEFAULT | Asset - Tenant/Rent Roll/Prop Mgmt |
| MANAGER FILES BANKRUPTCY | Asset - Tenant/Rent Roll/Prop Mgmt |
| NET WORTH BELOW THRESHOLD (TENANT) | Asset - Tenant/Rent Roll/Prop Mgmt |
| OCCUPANCY RATE BELOW THRESHOLD | Asset - Tenant/Rent Roll/Prop Mgmt |
| OCCUPANCY RATE BELOW THRESHOLD (DATE) | Asset - Tenant/Rent Roll/Prop Mgmt |
| OIL & GAS LEASE | Asset - Tenant/Rent Roll/Prop Mgmt |
| PROPERTY MANAGEMENT CHANGE | Asset - Tenant/Rent Roll/Prop Mgmt |
| RENT ABATEMENT PERIOD | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT "GOES DARK" | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT BANKRUPTCY | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT BUILD OUT NOT COMPLETED | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT DOES NOT RENEW | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT DOES NOT RENEW (DATE) | Asset - Tenant/Rent Roll/Prop Mgmt |
| TENANT TERMINATES LEASE/RECEIVES PYMT | Asset - Tenant/Rent Roll/Prop Mgmt |
| ESCROW ANALYSIS | Escrow Analysis |
| ESCROW SHORTAGE | Escrow Analysis |
| SPECIAL REQUEST ESCROW ANALYSIS | Escrow Analysis |

Popular Business Processes

| Template Name | Category |
|---|-----------------|
| FURNITURE, FIXTURE, & EQUIPMENT RESERVE | Escrow Reserves |
| REPAIR ESCROW EXTENSION | Escrow Reserves |
| RESERVE DRAW | Escrow Reserves |
| RESERVE FINAL MATURITY PROCESS | Escrow Reserves |
| TAX REQUIREMENT NOT MET | Escrow Tax |
| CASUALTY LOSS | Insurance |
| ENV INSURANCE REQUIREMENT ARE NOT MET | Insurance |
| HAZARD LOSS | Insurance |
| INSURANCE LOSS | Insurance |
| INSURANCE NON COMPLIANCE | Insurance |
| REQUEST FOR LIABILITY COVERAGE | Insurance |
| ORIGATION FEES | Origination |
| NET WORTH & LIQUIDITY BELOW THRESHOLD | Relationship |
| ACQUISITION UPGRADE/REHAB | Servicing |
| ANNUAL COMPLIANCE FOR OUR COMPANY | Servicing |
| BORROWER SUPPORT | Servicing |
| CAP (MAXIMUM BALANCE) | Servicing |
| CHECK MANAGEMENT PROCESS | Servicing |
| COLLECT PAYMENT | Servicing |
| COLLECT TAX | Servicing |
| CONDEMNATION | Servicing |
| COVENANT TRACKING | Servicing |
| CREDIT RATING BELOW TARGET (BWR/GTR) | Servicing |
| CREDIT RATING BELOW TARGET (TENANT) | Servicing |

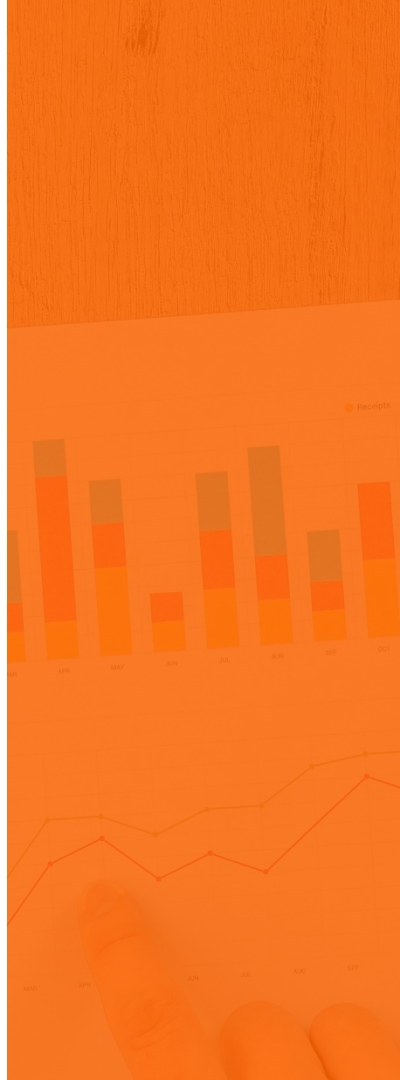
| Template Name | Category |
|---|--------------------------|
| DEBT YIELD FALLS BELOW THRESHOLD | Servicing |
| DEBT YIELD FALLS BELOW THRESHOLD (DATE) | Servicing |
| DECEASED KEY PRINCIPAL | Servicing |
| DECLINE IN CREDIT RATING OF SWAP COUNTERPARTY | Servicing |
| DOCUMENTS REQUIRED FROM BORROWER/GUARANTOR/SCHOOL | Servicing |
| EVENT OF DEFAULT (BWR REPS) | Servicing |
| EVENT OF DEFAULT (GENERIC) | Servicing |
| EXTENSION | Servicing |
| FEE PROCESS | Servicing |
| FINANCIAL RATING | Servicing |
| FLOOR (MINIMUM BALANCE) | Servicing |
| FOLLOW UP WITH BORROWER | Servicing |
| FOLLOW UP WITH MANAGEMENT COMPANY | Servicing |
| LOAN REQUIREMENT NOT MET | Servicing |
| LTV FALLS BELOW THRESHOLD | Servicing |
| MONTHLY CONSTANT CHANGE | Servicing |
| NOTIFY PROGRAM CFGI INFORMATION IS REC'D | Servicing |
| NSF PROCESS | Servicing |
| PAYOFF PROCESS | Servicing |
| PRE-APPROVED TRANSFER | Servicing |
| PREPAYMENT PREMIUM SET UP | Servicing |
| SPECIAL SERVICING LOAN PROCESS | Servicing |
| WAIVE LATE CHARGE | Servicing |
| ADDITIONAL ADVANCE | Servicing - Advance/Draw |
| CONSTRUCTION DRAW | Servicing - Advance/Draw |
| DOCUMENT MANAGEMENT PROCESS | Servicing - Hedge etc. |

Popular Business Processes

| Template Name | Category |
|--|------------------------|
| HEDGE/SWAP | Servicing - Hedge etc. |
| RESERVE RATE CAP | Servicing - Hedge etc. |
| SPRINGING RATE REQUIREMENT | Servicing - Hedge etc. |
| CMBS- SPECIAL SERVICING LOAN PROCESS | Servicing - Investor |
| IR REMITTANCE PROCESS | Servicing - Investor |
| LENDER/MASTER CERTIFICATION | Servicing - Investor |
| REMARKETING OF BONDS | Servicing - Investor |
| LOAN NOT PAID OFF AT MATURITY/ ARD | Servicing - Maturity |
| MATURITY PENDING PROCESS | Servicing - Maturity |
| PENDING MATURITY | Servicing - Maturity |
| NEW LOAN DOCUMENT TRACKING | Servicing - New Loan |
| NEW LOAN SETUP | Servicing - New Loan |
| POST CLOSING OBLIGATION NOT MET | Servicing - New Loan |
| QC/LOAN BOARDING | Servicing - New Loan |
| ADDITIONAL ENCUMBRANCE | Servicing BRW Request |
| ASSUMPTION | Servicing BRW Request |
| BORROWER REQUEST/CONSENTS | Servicing BRW Request |
| BORROWER TRANSFER | Servicing BRW Request |
| CHANGE OF USE OR CONVERSION OF USE | Servicing BRW Request |
| COLLATERAL RELEASE / ACHIEVEMENT AGREEMENT | Servicing BRW Request |
| CONDO CONVERSION | Servicing BRW Request |
| EASEMENT | Servicing BRW Request |
| EXPANSION/ADDITION | Servicing BRW Request |
| PARTIAL RELEASE | Servicing BRW Request |
| TAX ABATEMENT REVIEW | Servicing BRW Request |

Poll question.

What Business Processes do you wish were magic?



SECTION 2

How Do I Get Started?



Thinking Automation

What Happens Today

- The user created a report to remind you to do something
- The user tracks the work to do and what was done in a spreadsheet
- Multiple reports and spreadsheets are needed to track different processes for different investors

When Strategy does the work

- Strategy monitors the data and a Rule starts a Process automatically or the user runs an ad hoc report and starts a Process from the result set.
- The Process & Task Queue notifies you of work to be done and tracks progress for you
- All work can be in one queue, Find, Sort and Filter to view the work your way, or create separate queues

Inventory the Workflows You Do Today

- Start with Pain Points, High Risk and Compliance Items

Business Process Inventory

| Business Process | Process Template | What is the business scenerio to kick off this process? | Is the business process performed by one group or multiple Groups? | Volume | Frequency |
|------------------|------------------|---|--|--------|-----------|
| | | | | | |
| | | | | | |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Inventory the Workflows You Do Today (Cont.)

- Start with Pain Points, High Risk and Compliance Items

| Process | Process Template | Date or Manual Start | One-time or Recurring | Frequency | Category |
|--------------------------------------|---------------------------------------|----------------------|-----------------------|-----------|------------------|
| Loan Boarding Asset Management | Loan Boarding Asset Management | | One-time | | Asset Management |
| DSCR Falls Below Threshold | DSCR Falls Below Threshold | Date | Recurring | Quarterly | Asset Management |
| Financial Statements | Financial Statements | | Recurring | Quarterly | Asset Management |
| Inspections | Inspections | | Recurring | Annual | Asset Management |
| Debt Yield Falls Below Threshold | Debt Yield Falls Below Threshold | | | | Asset Management |
| Event of Default | Event of Default (BWR Reps) | Manual Start | | | Asset Management |
| Loan not Paid Off at Maturity or ARD | Loan not Paid Off at Maturity/ ARD | | | | Asset Management |
| LTV Falls Below Threshold | LTV Falls Below Threshold | Date Driven | | | Asset Management |
| Net Worth Below Threshold | Net Worth & Liquidity Below Threshold | Date Driven | | | Asset Management |
| NOI Falls Below Threshold | NOI Falls Below Threshold | Date Driven | | | Asset Management |
| Occupancy Rate Below Threshold | Occupancy Rate Below Threshold | | | | Asset Management |
| Tenant Credit Rating Below Target | Credit Rating Below Target (Tenant) | Date Driven | | | Asset Management |
| Reminder | | | | | |

Questions About Process

- Who are the typical users of Strategy's Process Manager
 - Business people
- What type of Business people?
 - Portfolio or Asset Mangers and Analysts, Operational (Tax, Insurance Payment process, Investor Reporting, New Loan, basically all functional areas)
- Who creates Process and Tasks in Strategy?
 - Business people who have security

SECTION 3

Processes, Tasks, Templating, and More



When Is It A Task vs. Process

- Task
 - Single Step or To-Do
 - (“Send Mom Flowers”)
 - Building block for larger Process
 - (“Call Borrower”)
 - Usually has Start and End Date
 - (“Receive Inspection Report”)
- Process
 - Groups of Tasks Linked Together
 - Could be Recurring
 - Many Steps, Different Users
 - Started by a Rule

Linking Process and Tasks

- Linked to One or More
 - Loans
 - Property
 - Collateral
 - Investor
 - 3rd Party
 - Name/Address ID
 - Inspection
 - Insurance
 - Tenant
- ...Or Nothing

Process Management

OK Apply Cancel Tools

Maintain Process Number: 658

Status: OPEN

Process Type: REMINDER PROCESS

Process Sub-Type:

Process Short Description: REMINDER PROCESS

Process Long Description:

Category:

Sub-Category 1:

Sub-Category 2:

Sub-Category 3:

Linked To:

Process Start Date: 10/05/2015

Process Due Date:

☒ Synchronize with last Task

Additional Information

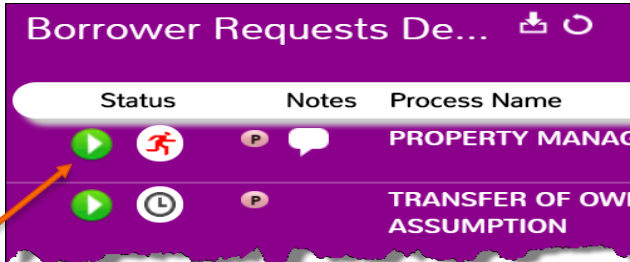
Process Tasks








☒ Compact view

| Order | Task Description | Task Status | Most Recent Note |
|-------|------------------|-------------|-------------------------------|
| 10 | REMINDER | | Call borrower on where the pa |
| 20 | REMINDER | | Send check to current address |

Go To Links

- Allow a Task to go Directly To
 - Appraisal
 - BuildRite
 - Collateral
 - Contact Log
 - Document Checklist
 - Financial Statements
 - Inspections
 - Insurance
 - Mapping Tool
 - Rent Rolls
 - Trigger Abstract
 - Watch List
- And More!



| Status | Notes | Process Name |
|---|---|--|
|  |  |   PROPERTY MANAG |
|  |  |  TRANSFER OF OW ASSUMPTION |

One Time vs. Recurring

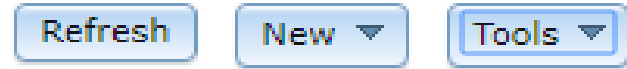
- One-Time
 - Single Task or Follow Up
 - Multi Step Reminder (Reminder Process)
 - Document Checklist/Covenant Tracking
 - New Loan Boarding
- Recurring
 - Annual Collections (Taxes)
 - Recurring Checklist (Credit Tenant Process)
 - Annual Remittances
 - Float Year (Internal Compliance)
 - Annual Collections Across Multiple Areas (Inspections, Financial, Rent Rolls, etc.)

How to Create a Task Template

- To create a new task template

- Process Manager search

- ✦ Tools



Process Management Search

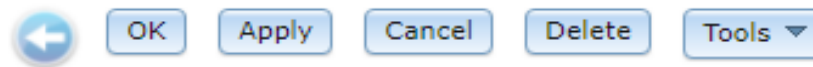
- ✦ Task Type Template Search



Process Management Search > Task Type Template Search

- ✦ New

- ✦ Task Type Template Maintenance



Process Management Search > Task Type Template Search > Task Type Template Maintenance

Task Template

[OK](#)[Apply](#)[Cancel](#)[Delete](#)[Tools](#) ▼**Task Type Ten**

[Process Management Search](#) » [Task Type Template Search](#) » [Task Type Template Maintenance](#)

Maintain Task Type Template ID: #-----

| | | | |
|-----------------------------------|--------------------------|--------------------|---|
| Task Type: | <input type="text"/> | | |
| Category: | <input type="text"/> | ▼ | |
| Sub-Category 1: | <input type="text"/> | ▼ | |
| Sub-Category 2: | <input type="text"/> | ▼ | |
| Sub-Category 3: | <input type="text"/> | ▼ | |
| Default Job Function Assignment: | <input type="text"/> | ▼ | |
| Default Role Assignment: | <input type="text"/> | ▼ | |
| Task Frequency: | ONE-TIME | ▼ | <input type="text"/> / <input type="text"/> Month/Day |
| | <input type="text"/> | # Days | |
| | <input type="text"/> | Recurring Interval | (Ex. every 2 years) |
| Automatically Start Task: | <input type="checkbox"/> | | |
| Task Start Date Indicator: | 0-USER ENTERS DATE ▼ | | |
| Task Due Date Indicator: | 0-USER ENTERS DATE ▼ | | |

Recommended Fields for Every New Task

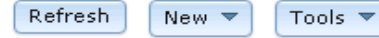
- Task Type
- Category
- Default Job Description Assignment
- Task Frequency
- Task Start Date Indicator
- Task Due Date Indicator

Process

- A group of tasks tied together to complete a complex job
- Steps (A.K.A. Tasks) in the Process can be performed sequentially or simultaneously
- A Process can be recurring or one time.
- A Process may be assigned a Responsible Party
- Can be automatically started by Strategy's Rules Engine

How to Create New Process Template

- To create a new process template (form)



Process Management Search

- Process Manager search

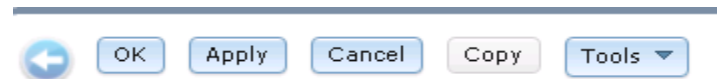
- ✧ Tools



Process Management Search » Process Template Search

- ✧ Process Templates Search

- ✧ New



Process Management Search » Process Template Search » !

- ✧ Process Template Maintenance

Process Template

[←](#) [OK](#) [Apply](#) [Cancel](#) [Copy](#) [Tools ▾](#)

Process Template Maintenance

[Process Management Search](#) » [Process Template Search](#) » [Process Template Maintenance](#)

Maintain Process Template ID: #-----

Process Type:

Process Short Description:

Process Long Description:

Process Sub-Type:

Category:

Sub-Category 1:

Sub-Category 2:

Sub-Category 3:

Start Date Indicator:

Due Date Indicator:

#Days Required to Complete:

► Additional Information

Process Template Tasks

Select Task Type from Template:

[Add >](#)

[ReSequence](#)

☐ Ignore Category

☒ Compact view

| Order | Task Type | Task Status | Assigned To | Role | A/S | Start Indicator | Due Indicator | #Days | Sev | Options |
|-------|-----------|-------------|-------------|------|-----|-----------------|---------------|-------|-----|---------|
|-------|-----------|-------------|-------------|------|-----|-----------------|---------------|-------|-----|---------|

Inactive: ☐

Recurring or One-Time:

Frequency: / Start Month/Day

Days
Recurring Interval (Ex. every 2 years)

Responsible Party:

Role:

Severity Level:

Approved: ☐

Next Process to Start: ☐ Confirm Before Starting

Case Number:

User Amount:

All Tasks are Sequential: ☒

Recommended Fields for Every New Process

- Process Type
- Process Short Description
- Category
- Task Start Date Indicator
- Task Due Date Indicator
- Recurring or One-Time
- Responsible Party

SECTION 4

Day In, Day Out

Process Manager & Process/Task Queue

Automate all of your processes

- Quickly assign and route work to whoever you want (even third party vendors)
- Completely visibility to all parties with your notes and associated documents in one central location
- Consents, covenants, asset management, etc.
- Eliminate the need for reminders and ticklers when implemented
- Provides a complete history and audit trail you can pull up instantly on screen







Payoff Process Detail




Search

Create New Start Complete Waived Inactive Reassign Job Function Reassign Role Notes Email View Process View Task Fees Document Checklist

| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | Assigned To | Days Left | Borrower | Property | Investor | Officer |
|--------|-------|----------------|--|--|------------|------------|--|-----------|---------------------------------|----------|----------------------|------------|
| | | PAYOFF PROCESS | SENT INVESTOR/ LENDER/MASTER SERVICER QUOTE FOR REVIEW | 02/13/2017 | 02/15/2017 | LOAN 445 | John Doe, Asset Manager 1 | -915 | AMERRICA MANAGEMENT CORPORATION | VARIOUS | GinnieMae MBS [24] | SMYTH JOHN |
| | | | PAYOFF PROCESS | RECEIVE PAYOFF REQUEST AND CALCULATE QUOTE | 10/19/2016 | LOAN 445 | Jane Doe, Asset Manager 4 | 0 | AMERRICA MANAGEMENT CORPORATION | VARIOUS | GinnieMae MBS [24] | SMYTH JOHN |
| | | | PAYOFF PROCESS | PAYOFF QUOTE SENT TO BORROWER | 10/19/2016 | 10/21/2016 | LOAN 200000001 Jane Doe, Asset Manager 4 | -1032 | Opal Management Company | VARIOUS | ABC Investment [501] | JANE DOE |

Process and Task Queue

| My Work Process   | | |
|---|------------|--|
| Process Desc | Due | Related |
|  INSPECTION | 09/30/2015 |  LOAN 110681 |
|  INSPECTION | 09/30/2015 |  LOAN 110681 |

| My Work Task   | | |
|--|-----|--|
| Task Desc | Due | Related |
| REVIEW INSPECTION | |  LOAN 110681 |

VS.

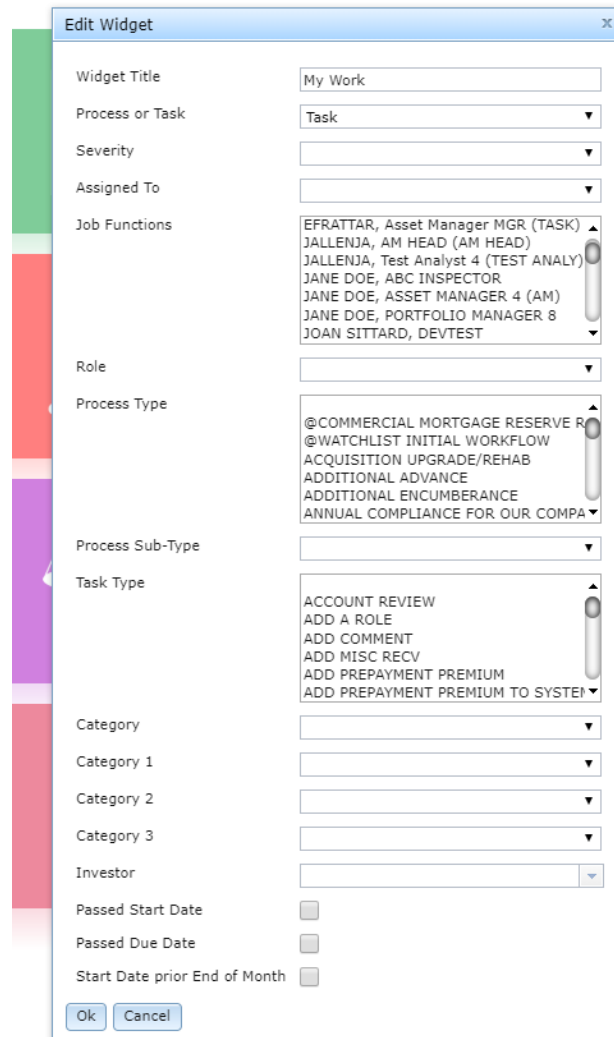
Process Manager Application Widget



- Monitor the status of existing Processes and Tasks
- Can't edit the templates

- Advanced Search Capabilities
- Create templates for Tasks and Processes

Use the Edit
Widget
option to
filter the
Process &
Task Queue
to show the
work you
want to see



Edit Widget

Widget Title: My Work

Process or Task: Task

Severity:

Assigned To:

Job Functions: EFRATTAR, Asset Manager MGR (TASK)
JALLENJA, AM HEAD (AM HEAD)
JALLENJA, Test Analyst 4 (TEST ANALY)
JANE DOE, ABC INSPECTOR
JANE DOE, ASSET MANAGER 4 (AM)
JANE DOE, PORTFOLIO MANAGER 8
JOAN SITTARD, DEVTEST

Role:

Process Type: @COMMERCIAL MORTGAGE RESERVE R
@WATCHLIST INITIAL WORKFLOW
ACQUISITION UPGRADE/REHAB
ADDITIONAL ADVANCE
ADDITIONAL ENCUMBERANCE
ANNUAL COMPLIANCE FOR OUR COMPA

Process Sub-Type:

Task Type: ACCOUNT REVIEW
ADD A ROLE
ADD COMMENT
ADD MISC RECV
ADD PREPAYMENT PREMIUM
ADD PREPAYMENT PREMIUM TO SYSTEM

Category:

Category 1:

Category 2:

Category 3:

Investor:

Passed Start Date: ☐

Passed Due Date: ☐

Start Date prior End of Month: ☐

Ok Cancel

52

48 of 48

How to Create New Task

- From Process Manager Search
 - New -> Task From Template
 - Select Task from Dropdown
 - Hit OK
- It will now show on your Task Widget

Task Widget

My Work Detail  

Search

 Create New  Start  Complete  Waived  Inactive  Reassign Job Function  Reassign Role  Notes  Email  View Process  View Task  Fees  Document Checklist

| Status | Notes | Process Name | Task Description | Start | Due | Related To | Assigned To | Days Left | Borrower | Property | Investor | Officer |
|--|---|---------------------------------------|--|------------|------------|--|----------------------------------|-----------|---|--------------------|----------------------|------------|
|  |  | | CALL BORROWER | | |  LOAN 109534 | Karen Jones, Portfolio Manager 1 | 0 | CORPORATION PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|  |  | | FREE FORM | | |  LOAN 109534 | Karen Jones, Portfolio Manager 1 | 0 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   |   rent_roll.pdf | TENANT DOES NOT RENEW (DATE) | DETERMINE NOTICE RENEWAL DATE | 10/20/2015 | 11/19/2015 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1545 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   |   | TENANT DOES NOT RENEW (DATE) | UPDATE NOTES WITH FINDINGS & ROLL TRIGGER TO NEXT REVIEW DATE | 11/20/2015 | 12/19/2015 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1515 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   |  | DSR FALLS BELOW THRESHOLD | PASS TESTS RESULTS UPDATED IN STRATEGY AND NEXT REVIEW DATE IS ADVANCED | 11/02/2015 | 12/02/2015 |  LOAN 109534 | John Doe, Asset Manager 1 | -1532 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   |  | DSR FALLS BELOW THRESHOLD | PREPARE ESCALATION | 11/02/2015 | 11/02/2015 |  LOAN 109534 | John Doe, Asset Manager 1 | -1562 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   |  | DSR FALLS BELOW THRESHOLD | PREPARE AN ACTION FORM | | |  LOAN 109534 | John Doe, Asset Manager 1 | 0 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   | | TENANT *GOES DARK* | CONFIRM OCCUPANCY, VIA PHONE TO BUSINESS OR EMAIL TO BORROWER | 05/19/2016 | 06/07/2016 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1344 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   | | TENANT *GOES DARK* | UPDATE NOTES WITH FINDINGS & ROLL TRIGGER TO NEXT REVIEW DATE | 06/08/2016 | 06/27/2016 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1324 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   | | TENANT *GOES DARK* | CONFIRM TENANT ON MOST RECENT RENT ROLL IN SAME SPACE/SF | 07/28/2016 | 08/17/2016 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1273 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   | | TENANT *GOES DARK* | UPDATE NOTES WITH FINDINGS & ROLL TRIGGER TO NEXT REVIEW DATE | 09/07/2016 | 09/26/2016 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1233 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |
|   | | NET WORTH & LIQUIDITY BELOW THRESHOLD | RETRIEVE GUARANTOR'S FINANCIAL STATEMENTS TO DETERMINE THRESHOLD REQUIREMENT | 10/20/2016 | 11/19/2016 |  LOAN 109534 MULTIPLE (2) | John Doe, Asset Manager 1 | -1179 | PENN JERSEY MANAGEMENT CORPORATION | ABC Properties INC | ABC Investment [501] | ADAMS JOHN |

Task Widget

- To Work with a Task in your Widget
 - Highlight the Task
 - Select an Action
 - ✦ Start, Complete, Waive
 - ✦ Reassign
 - ✦ View Notes
 - ✦ View Process
 - ✦ Send Email

How to use Process Template to Create a Process

RefreshNewTools

Process Management Search

☒ Compact view

By ProcessBy Task

Page Size: 20

Advanced Search

| Process Type | Sub-Type | Workflow | Process Short Description | Start Date | Due Date | Days | Frequency | Status | Linked To | Responsible Party |
|-----------------------------------|----------|----------|-----------------------------|------------|------------|------|-----------|--------|----------------------------------|----------------------|
| ANNUAL COMPLIANCE FOR OUR COMPANY | | | ANNUAL COMPLIANCE FOR OUR C | 01/15/2015 | 06/30/2015 | -101 | RECURRING | OPEN | INVESTOR Commercial Investor 501 | KPETERPAUL, Portfoli |
| LOAN BOARDING ASSET MANAGEMENT | CREFC | | LOAN BOARDING ASSET MANAGE | 09/23/2015 | 10/11/2015 | 2 | ONE-TIME | OPEN | LOAN 445 | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | COLLECT INSPECTION | 10/02/2015 | 10/02/2015 | -7 | RECURRING | OPEN | LOAN 445 | KPETERPAUL, Portfoli |
| REMINDER PROCESS | | | REMINDER PROCESS | 10/05/2015 | 10/05/2015 | 0 | ONE-TIME | OPEN | LOAN 445 | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | COLLECT INSPECTION | 10/05/2015 | 10/05/2015 | -4 | RECURRING | OPEN | LOAN 445 | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| COLLECT INSPECTION | | | | | | | | | | KPETERPAUL, Portfoli |
| RESERVE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| RESERVE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| DOCUMENT CHECKLIST | | | | | | | | | | KPETERPAUL, Portfoli |
| IR REMITTANCE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| IR REMITTANCE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| CREDIT TENANT PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| IR REMITTANCE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| IR REMITTANCE PROCESS | | | | | | | | | | KPETERPAUL, Portfoli |
| ANNUAL COMPLIANCE FOR OUR COMPANY | | | | | | | | | | KPETERPAUL, Portfoli |

New Process By Category From Template

From Process Template:

Template Description:

Short Description:

Responsible Party:

Linked To:

Allow Duplicates: ☐

☒ Process Only

☐ Workflow Only

☐ Both







































OK

Cancel

Process Creation

- From Process Manager
 - New -> Process From Template
 - Start Typing to Filter, then Select Template from Dropdown
 - Hit “Link To”
 - ✦ Select Loan, Property, etc. then pick applicable item
 - Hit OK
- Process will appear in Process Manager Search and Magic Widget

Process Widget

| My Work Detail   | | | | | | | | | | |
|---|---|-----------------------------------|------------------------|------------|------------|--|---------------------------------|-----------|-----------------------------|----------------------|
| Create New Start Complete Waived Inactive Reassign Notes Email View Process View Task | | | | | | | | | | |
| Status | Notes | Process Name | Active Task(s) | Start | Due | Related To | Assigned To | Days Left | Property | Investor |
|  |  | ANNUAL COMPLIANCE FOR OUR COMPANY | MULTIPLE 3 | 01/15/2015 | 06/30/2015 | INVESTOR Commercial Investor 501 [501] | KPETERPAUL, Portfolio Manager 3 | -101 | | Commercial 501 [501] |
|  |  | LOAN BOARDING ASSET MANAGEMENT | MULTIPLE 6 | 09/23/2015 | 10/11/2015 |  LOAN 445 | KPETERPAUL, Portfolio Manager 3 | 2 | [134] | GinnieMae |
|  |  | COLLECT INSPECTION | RECIEVE INSPECTION | 10/02/2015 | 10/02/2015 | | KPETERPAUL, Portfolio Manager 3 | -7 | | |
|  |  | REMINDER PROCESS | REMINDER | 10/05/2015 | |  LOAN 445 | KPETERPAUL, Portfolio Manager 3 | | [134] | GinnieMae |
|  |  | COLLECT INSPECTION | RECIEVE INSPECTION | 10/05/2015 | 10/05/2015 |  LOAN 445 | KPETERPAUL, Portfolio Manager 3 | -4 | [134] | GinnieMae |
|  |  | COLLECT INSPECTION | MULTIPLE 2 | 10/05/2015 | 10/05/2015 | COLLATERAL 224 | KPETERPAUL, Portfolio Manager 3 | -4 | Apple Tree Estates [224] | |
|  |  | COLLECT INSPECTION | RECIEVE INSPECTION | 10/05/2015 | | COLLATERAL 38 | KPETERPAUL, Portfolio Manager 3 | | Charter Oak Apartments [38] | |
|  |  | COLLECT INSPECTION | MULTIPLE 2 | 10/05/2015 | 10/05/2015 | COLLATERAL 38 | KPETERPAUL, Portfolio Manager 3 | -4 | Charter Oak Apartments [38] | |
|  |  | TEST ALL TASK SEQ | SCHEDULE AN INSPECTION | 10/06/2015 | 10/06/2015 | COLLATERAL 209 | KPETERPAUL, Portfolio Manager 3 | -3 | Glen Ellyn Project 09 [209] | |
|  |  | TEST 2 SYNC W LAST TASK | SCHEDULE AN INSPECTION | 10/06/2015 | 12/05/2015 | COLLATERAL 209 | KPETERPAUL, Portfolio Manager 3 | 57 | Glen Ellyn Project 09 [209] | |
|  |  | TEST 3 BUILD INSP RECORD COMPL | SCHEDULE AN INSPECTION | 10/06/2015 | 12/05/2015 | COLLATERAL 209 | KPETERPAUL, Portfolio Manager 3 | 57 | Glen Ellyn Project 09 [209] | |
|  |  | RESERVE PROCESS | | 10/06/2015 | |  LOAN 150075400 | KPETERPAUL, Portfolio Manager 3 | | [163] | Commercial 512 [512] |
|  |  | RESERVE PROCESS | | 10/06/2015 | |  LOAN 150075400 | KPETERPAUL, Portfolio Manager 3 | | [163] | Commercial 512 [512] |
|  |  | DOCUMENT CHECKLIST | MULTIPLE 4 | 10/07/2015 | 11/06/2015 |  LOAN 445 | KPETERPAUL, Portfolio Manager 3 | 28 | [134] | GinnieMae |
|  |  | IR REMITTANCE PROCESS | IR REMITTANCE | 11/02/2015 | 11/02/2015 | INVESTOR Commercial Investor | KPETERPAUL, Portfolio Manager 3 | 24 | | Commercial 501 [501] |

23 of 23

Process Widget

- To Work with a Process in your Widget
 - Highlight the Process
 - Select an Action
 - ✦ Start, Complete, Waive
 - ✦ Reassign
 - ✦ View Notes
 - ✦ View Process/Task
 - ✦ Send Email

Float year (Annual Compliance for our Company)- maintenance

Process Template Maintenance

Process Management Search > Process Management > Process Template Search > Process Template Maintenance

Maintain Process Template ID: #000000020

Inactive: ☐

Recurring or One-Time: RECURRING

Frequency: FLOAT YEAR / 1 / 15 Start Month/Day
166 # Days 6 / 30 Due Month/Day
1 Recurring Interval (Ex. every 2 years)

Responsible Party:

Role:

30 ANNUAL FINANCIALS KPETERPAUL, Portfolio Manager 6 / 30 6 / 30 0



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survey.**



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recording with
your colleagues.**



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monthly webinars.**



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you'd like to learn more.**



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