Release 20

ONE OF OUR MOST ROBUST RELEASES

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Enhancements – Other Conference Sessions

- API’s
- Adjustable Loan Enhancements
- CREFC Reporting
- Insurance Compliance
- Investor Reporting
- New Loan Entry Spreadsheet
- Syndication Notices
- Wires

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CS and Portal Integration

OPTIONS TO QUICKLY SWITCH BETWEEN DESKTOP APPLICATION (CS) AND PORTAL WHEN NEEDED.

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Single Sign-On

- Strategy application now has the option to open both interfaces with a single sign-on*. Strategy must be configured to access the Portal before using the single sign-on, or before accessing the desktop modules in CS from the Portal using the new widgets.

  *The Portal must be launched by first signing into CS.

- Configuration-
  - New database file PPORTALURL must contain the URL to where the Portal is deployed
  - The User ID must be in the User Information file, PUSERINFO, and in addition, the User ID must have an entry in the new polling file.

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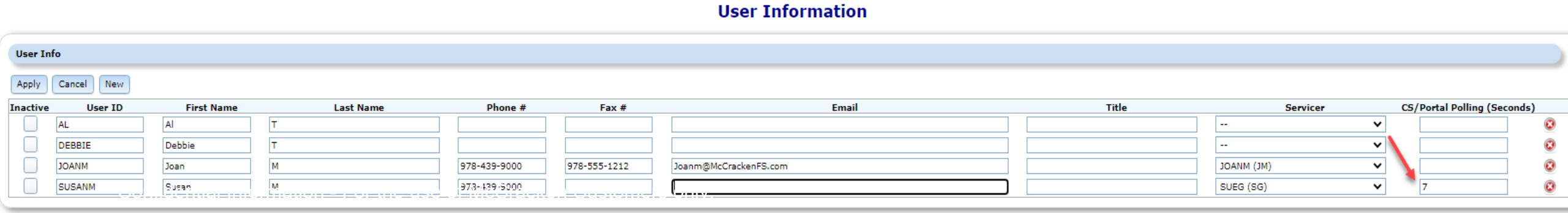
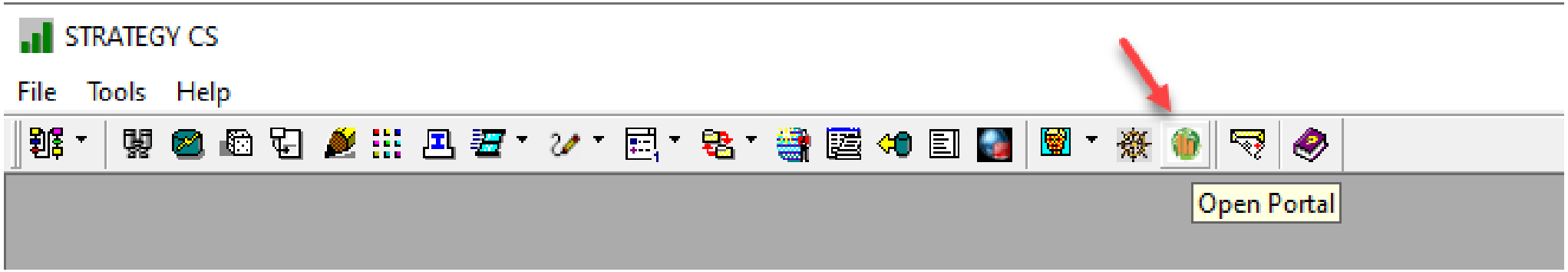
Single Sign-On

- Configuration - Tools Widget
- The Tools widget contains the same information as the User Information screen in CS (Tools ->Maintenance->User Information) with one addition field…CS/Portal Polling (Seconds). This field controls the ability to open both interfaces with one sign on.
  - The User ID must have a value in the **CS/Polling (Seconds)** column. Stored in new file PCSPORTIM/PCSECONDS
    - Valid values are 5 or greater
    - A “0” value will disable the “Open Portal” button in CS
    - Negative values and values of 1-4 are not valid entries in this field



Single Sign-on

- If a User closes their Portal session and needs to re-launch it, the ‘Open Portal’ icon can be used from CS



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New ‘Module’ Widgets

- A new set of Widgets* has been added to the Portal to access specific modules in CS. The Modules are Asset, Billing, Escrow, Investor, Loan Administration, Loan Entry and Transactions.
- In addition, a pre-built Container widget has been added called “Strategy CS Modules”
  - The Container widget has one of each CS Module widgets in it. The widgets can be added to the Portal either piecemeal or as the complete Container.
  - *These Widgets will only work when the Portal has been launched from CS.

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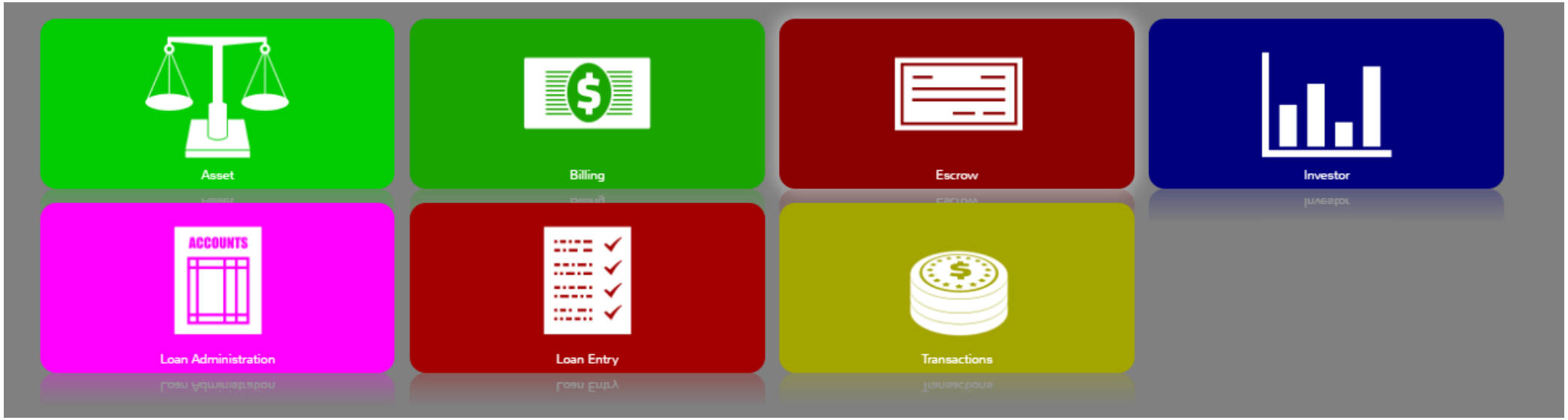
New ‘Module’ Widgets

- New Widgets
  - Strategy CS Modules

Container Widget



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Portal - Navigator

- Users can now run Navigator from the Portal if they have security to Navigator and security to each module that is open in the Navigator.
- The Portal must be launched by first signing into CS.
- Navigator can be launched 2 ways –
  - From the Dashboard, using the Super Search - The Navigator dropdown will display after a loan has been entered in the Super Search box
    - The dropdown contains all Public Navigators.
  - From the Process and Task widget
- If the User is assigned Loan Sets, the Navigator functionality is not available.

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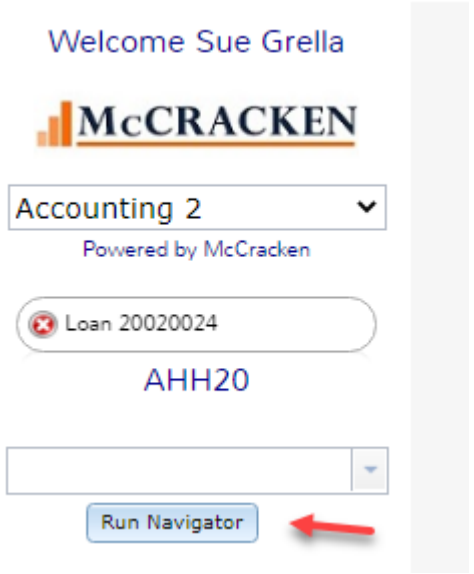
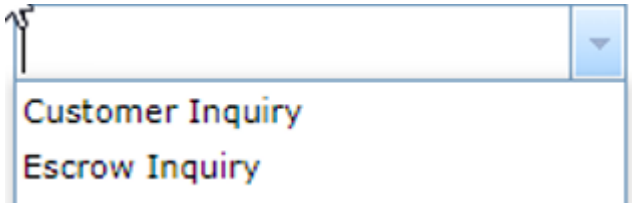
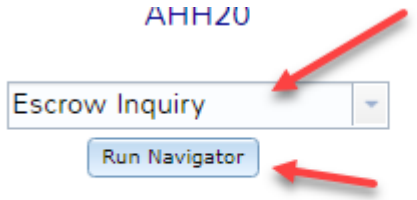
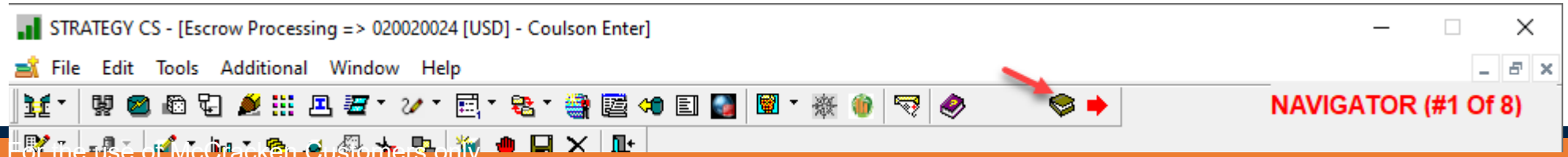
Portal - Navigator

From the Dashboard->Enter a loan number in the Super Search box->Click on the Search icon 🔍 ->Select a Navigation from the dropdown->Click the Run Navigator button->Navigation will open in CS









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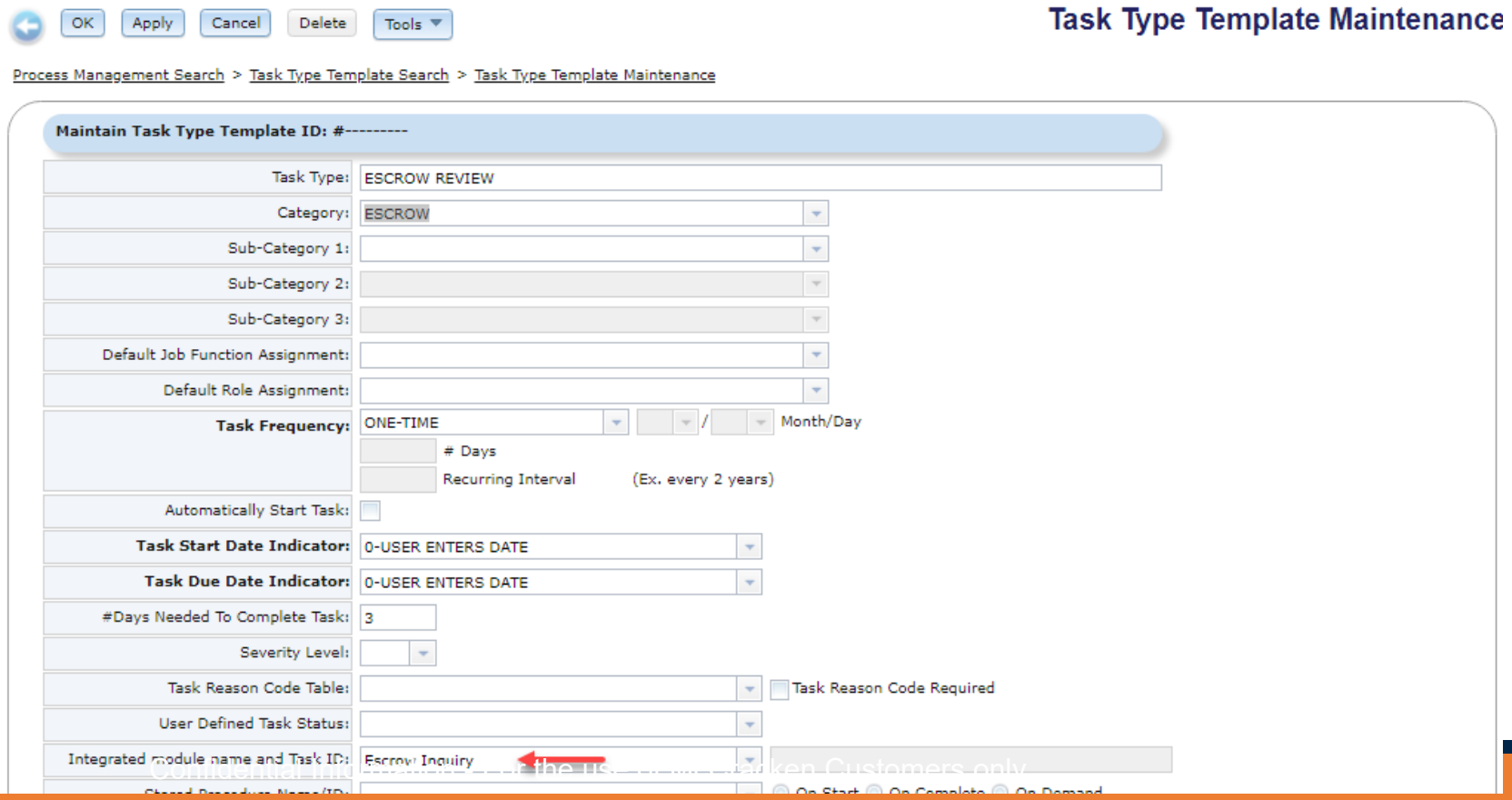
Portal - Navigator

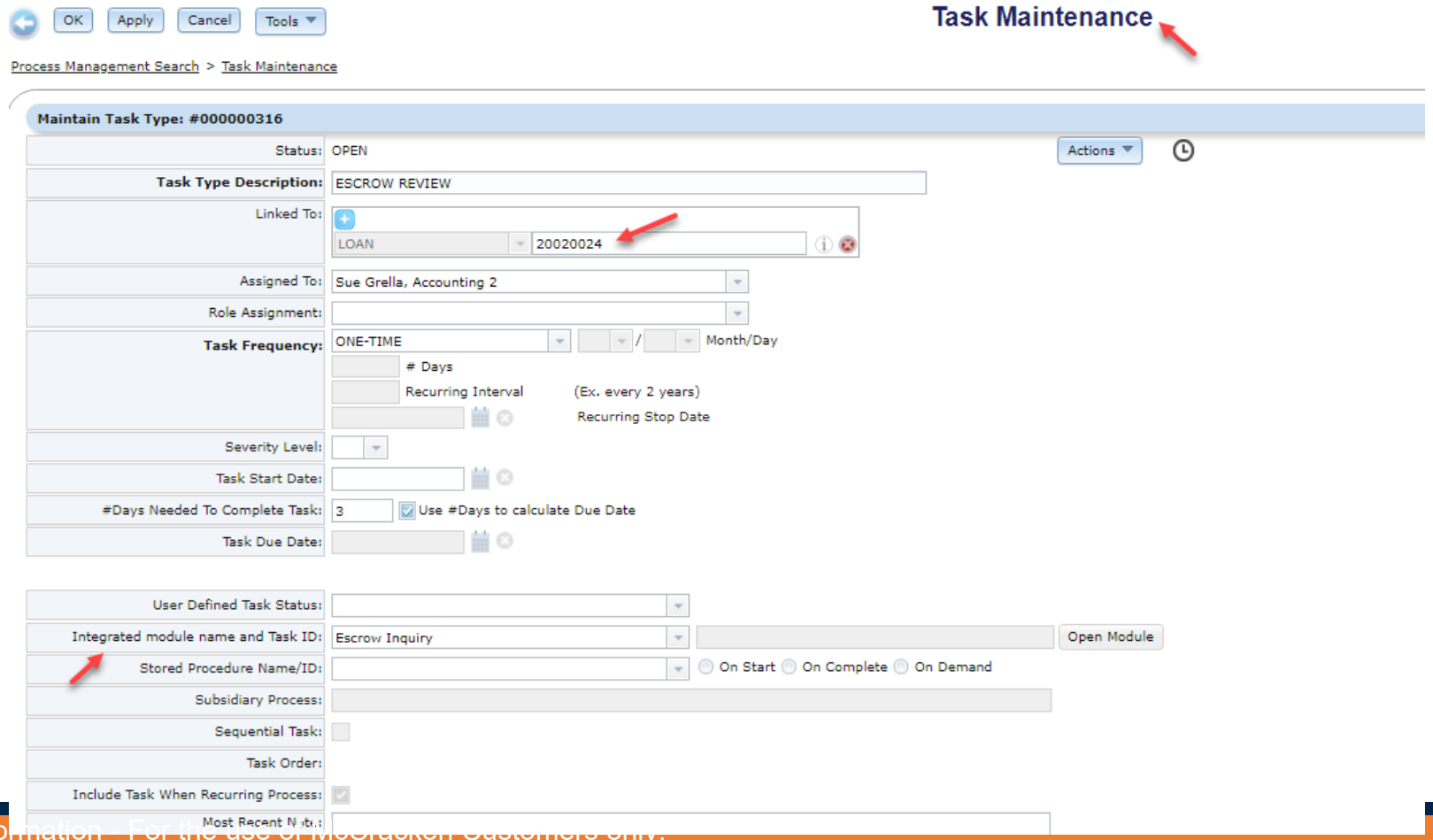
From the Process and Task Queue - Process Tasks can now integrate with Navigators in CS to provide clear communication of what needs to be done and how to complete that task



A task template has been created and the Escrow Inquiry Navigation is being used for the ‘Integrated module name and Task ID’

Portal - Navigator

A task is created from the template and assigned and linked to a loan



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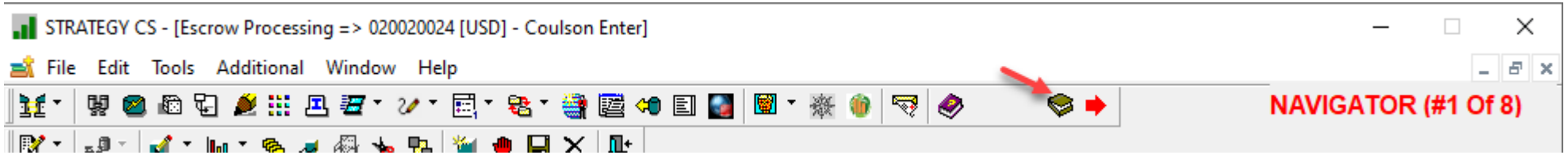
Portal - Navigator

From the Process and Task widget - Task appears in the Queue.

Clicking the green ‘Go To’ button directs the User to the first screen in the Navigator



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Multifactor Authentication

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Multifactor Authentication

- Optional new functionality
- Works with existing Strategy User ID Model
  - When enabled, requires token provided via Authenticator App, SMS, or Phone Call

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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

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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 Affected	Loan Exposure
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	TODD	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	HAMLIN	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	BRULE	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	SANBORN	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	ZIEBACH	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	GREGORY	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	BUTTE	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	JACKSON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CUSTER	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	PENNINGTON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CAMPBELL	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CHEYENNE RIVER INDIAN RESERVATION	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	DEUEL	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	BENNETT	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	WALWORTH	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	FALL RIVER	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	ROSEBUD INDIAN RESERVATION	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	MEADE	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	HAAKON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	JONES	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	HANSON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	AURORA	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	TURNER	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	TRIPP	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	LYMAN	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	MELLETTE	2019-05-26	2019-06-07	Yes	No	No	Yes		

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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 Affected	Loan Exposure
Hurricane	HURRICANE DORIAN	2019-08-30	FL	OSCEOLA	2019-08-28	2019-09-09	No	No	No	Yes	1	500,887.39
Hurricane	HURRICANE DORIAN	2019-09-03	NC	SCOTLAND	2019-09-01	2019-09-09	No	No	No	Yes	1	3,418,113.88
Severe Storm(s)	SEVERE STORM AND FLOODING	2019-08-15	NH	GRAFTON	2019-07-11	2019-07-12	Yes	No	No	Yes	1	6,497,829.25
Hurricane	HURRICANE BARRY	2019-08-27	LA	ASCENSION	2019-07-10	2019-07-15	Yes	No	No	Yes	1	7,102,393.00
Coastal Storm	TROPICAL STORM BARRY	2019-07-11	LA	ASCENSION	2019-07-10	2019-07-15	No	No	No	Yes	1	7,102,393.00
Severe Storm(s)	SEVERE STORMS, TORNADOES, AND FLOODING	2019-07-09	MO	ST. CHARLES	2019-04-29	2019-07-05	Yes	No	Yes	No	2	136,034,600.55
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	TODD	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	HAMLIN	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	BRULE	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	SANBORN	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	ZIEBACH	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	GREGORY	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	BUTTE	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	JACKSON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CUSTER	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	PENNINGTON	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CAMPBELL	2019-05-26	2019-06-07	Yes	No	No	Yes		
Flood	SEVERE STORMS AND FLOODING	2019-09-23	SD	CHEYENNE RIVER INDIAN RESERVATION	2019-05-26	2019-06-07	Yes	No	No	Yes		

SEVERE STORMS, TORN...

Search

Loan Number	UPB	Property Address	Property Name	Management Company	Contact	Phone Number	Fax Number	Insurance Type(s)	Insurance Expiration(s)
150151502	130,319,252.63	3788 Deer Park Drive, St Charles MO 63301	Deer Park Industrial	MFS Management Co	Fred Stone	9784399000	0		
109966	5,715,347.92	3788 Deer Park Drive, St Charles MO 63301	Deer Park Industrial	MFS Management Co	Fred Stone	9784399000	0	TERRORISM GENERAL LIABILITY FIRE INSURANCE LOSS OF RENTS COVERAGE TERRORISM	2004-05-01 2004-05-01 2004-07-01 2004-07-01 2004-07-01

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Utilities Widget

VIEW SPOOLED FILES, FILE ATTRIBUTES

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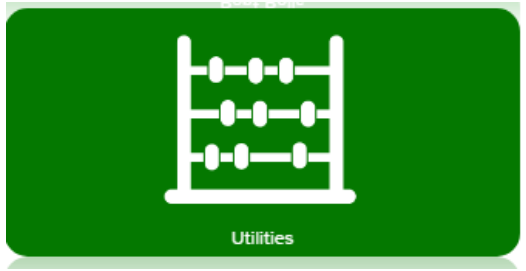
Utilities Widget



- Utilities Widget takes four popular utilities previously available from green screen menus in Strategy and makes them available in the Portal
  - The options are View Spooled Files, File Attributes, PLOCK Maintenance and Update Market Rates.
  - The default view for the widget is the Spooled Files view

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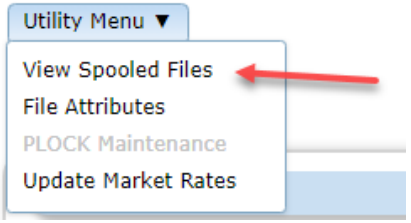
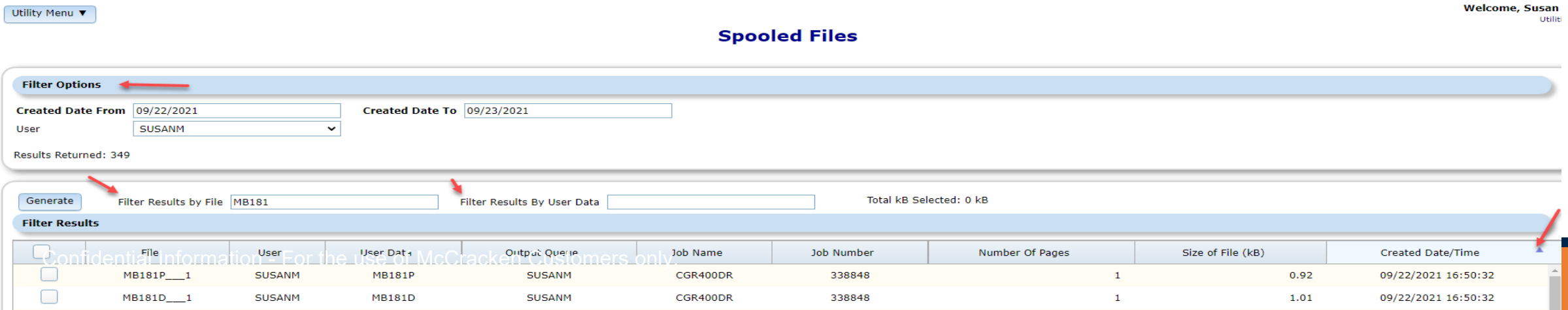
Utilities Widget



- The first option is View Spooled Files. This option replaces Option #2, “Display printer status” on the Green Screen User Menu.
- Filter Options – User can filter the files displayed using a date range on the Creation Date and on User Profile. These values default to displaying the spool files for the active User that were created for the prior days and the current day/date.
- Other filter options include filtering by File or by User Data
- Each column heading has a sort option



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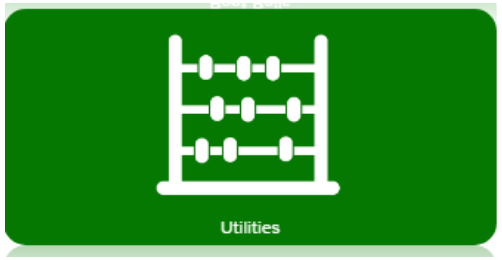
Utilities Widget



- Spooled Files – Generating Individual PDF documents
  - Highlighting a row will generate a PDF for the selected spooled file

Filter Options

Created Date From 09/22/2021 **Created Date To** 09/23/2021

User SUSANM

Results Returned: 349

Generate Filter Results by File MB181 Filter Results By User Data Total kB Selected: 0 kB

Filter Results

	File	User	User Data	Output Queue	Job Name	Job Number	Number Of Pages	Size of File (kB)	Created Date/Time
☐	MB181P___1	SUSANM	MB181P	SUSANM	CGR400DR	338848	1	0.92	09/22/2021 16:50:32
☐	MB181D___1	SUSANM	MB181D	SUSANM	CGR400DR	338848	1	1.01	09/22/2021 16:50:32
☐	MB181S	SUSANM	MB181S	SUSANM	CGR400DR	338848	1	0.46	09/22/2021 16:50:32

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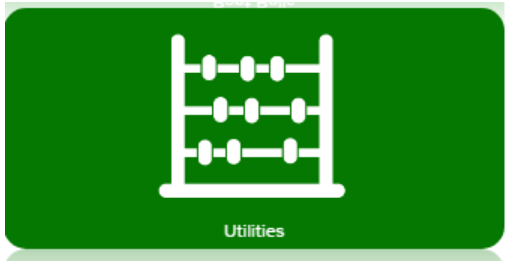
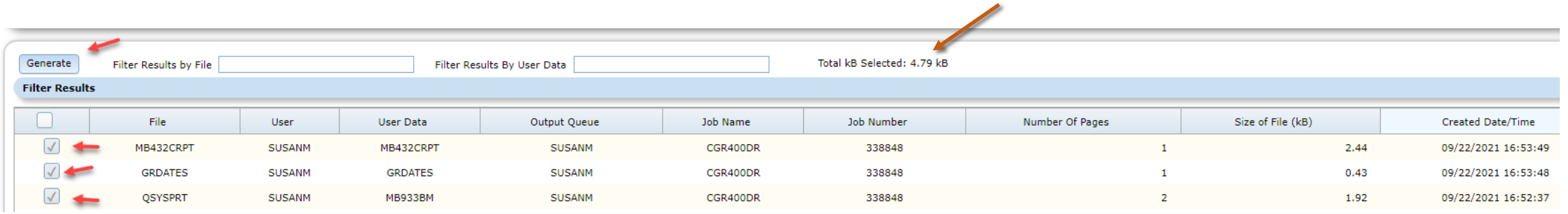
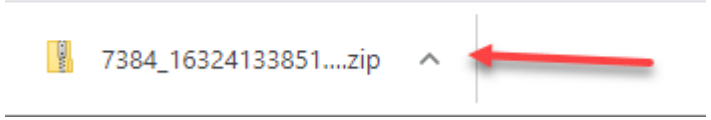
Utilities Widget



- Spooled Files – Generate Button
  - Using the check boxes to the left of the Spool file, User can select one or multiple spooled files can be selected to be generated as individual PDFs and packaged into a zip file for download.
  - The 'Total kB Selected' indicator displays the sum total of the file sizes selected. There's a threshold to prevent performance issues which is defaulted to 500mb (500,000kb). If exceeded a message will display requesting User to select fewer files



File	User	User Data	Output Queue	Job Name	Job Number	Number Of Pages	Size of File (kB)	Created Date/Time
MB432CRPT	SUSANM	MB432CRPT	SUSANM	CGR400DR	338848	1	2.44	09/22/2021 16:53:49
GRDATES	SUSANM	GRDATES	SUSANM	CGR400DR	338848	1	0.43	09/22/2021 16:53:48
QSYSPRT	SUSANM	MB933BM	SUSANM	CGR400DR	338848	2	1.92	09/22/2021 16:52:37



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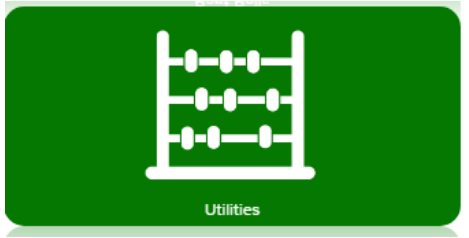
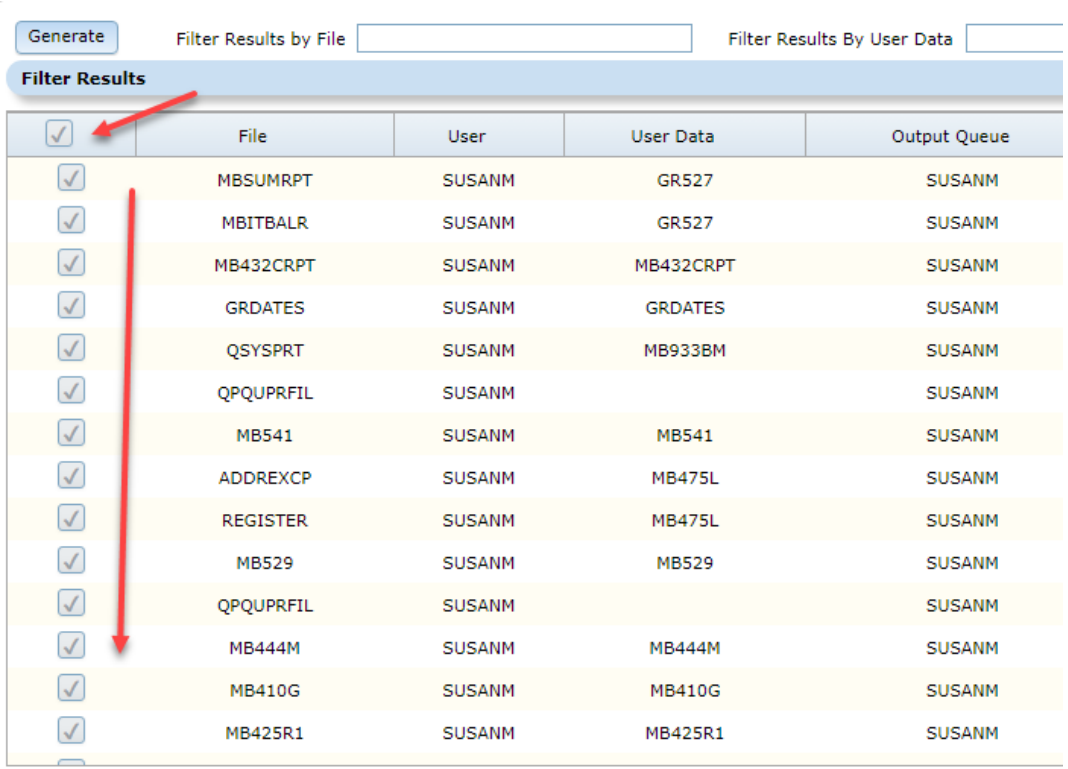
Utilities Widget



Spooled Files – Selecting the top-most checkbox will either select or de-select all of the spooled files in the grid



File	User	User Data	Output Queue
MBSUMRPT	SUSANM	GR527	SUSANM
MBITBALR	SUSANM	GR527	SUSANM
MB432CRPT	SUSANM	MB432CRPT	SUSANM
GRDATES	SUSANM	GRDATES	SUSANM
QSYSPRT	SUSANM	MB933BM	SUSANM
QPQUPRFIL	SUSANM		SUSANM
MB541	SUSANM	MB541	SUSANM
ADDREXCP	SUSANM	MB475L	SUSANM
REGISTER	SUSANM	MB475L	SUSANM
MB529	SUSANM	MB529	SUSANM
QPQUPRFIL	SUSANM		SUSANM
MB444M	SUSANM	MB444M	SUSANM
MB410G	SUSANM	MB410G	SUSANM
MB425R1	SUSANM	MB425R1	SUSANM

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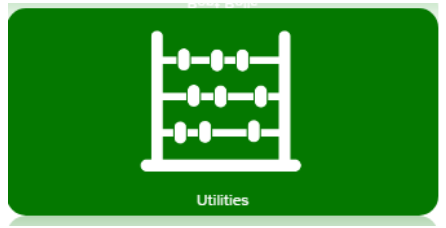
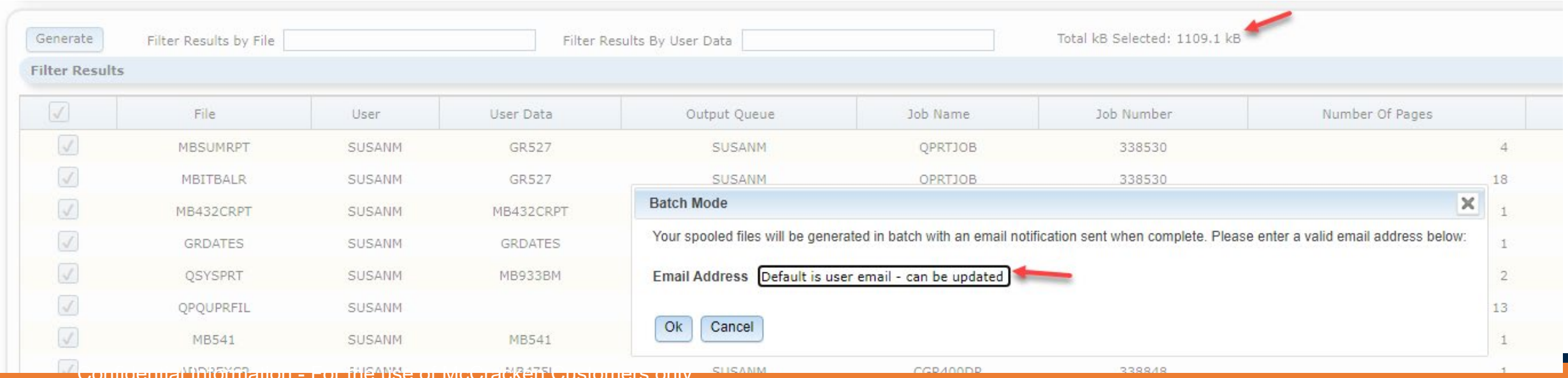
Utilities Widget



- Spooled Files – Batch mode
  - Batch-mode threshold (default: 1000kb) or there are more than 10 selected, the zip file generation will run in batch mode and an email will generate upon completion. Otherwise, the generation will run live and once complete a download window will pop up. There's a lower threshold for batch mode to limit the amount of time a User would spend looking at the screen.
  - If batch is triggered, then a dialog will pop up and request an email address to send a completion email. The program will retrieve a system email address for the user ID if one is available and will pre-fill the email address field. Email address can be updated.



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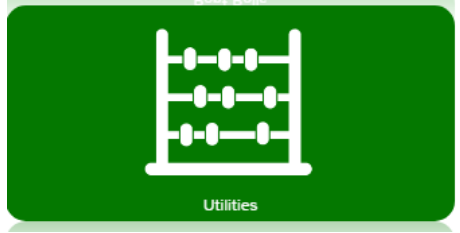
Utilities Widget



- Completion email – Clicking the link provided in the email will take the User to retrieve their spooled files.

Spooled Files Are Ready For Download

NR

No Reply <noreply@mccrackenfs.com>
To Sue Grella

Please click the below link to retrieve your spooled files. The files requested will be removed within 48 hours.

Click Here...

McCRACKEN

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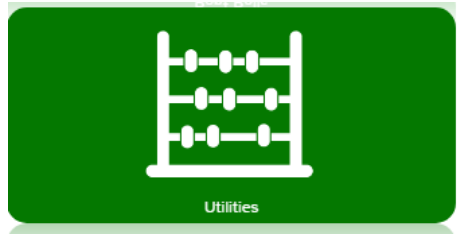
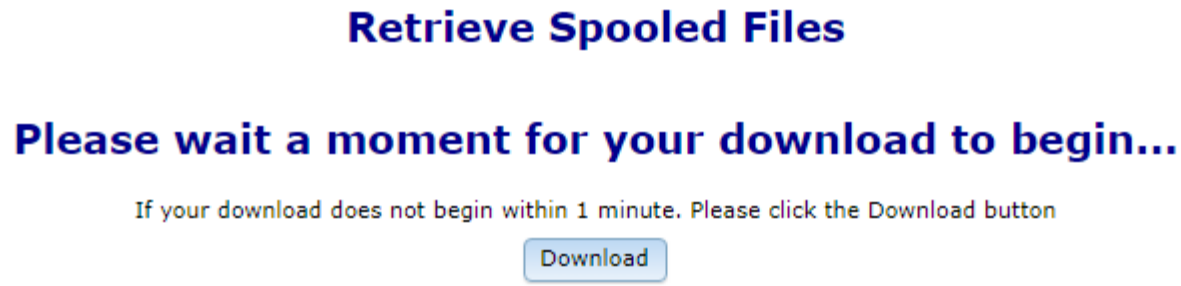
Utilities Widget



- Once the User has been authenticated the app will redirect to the retrieval page, where the file is made available to download.
- There is also a download button to re-request the file for download in the event that the download prompt does not appear.



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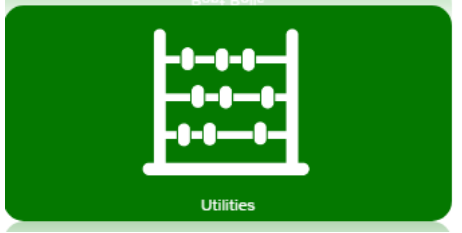
Utilities Widget



- Spooled Files –
  - Cleanup
    - Dayend program. Called by Procedure MB499. This program cleans up the temporary IFS directory that holds the spool files

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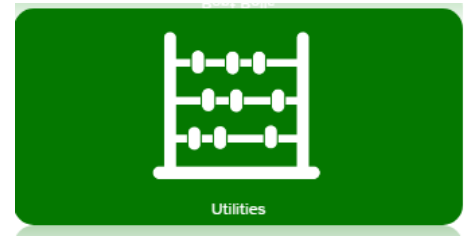
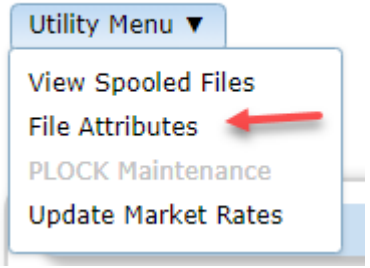
Utilities Widget



- The second option on the Utility Menu, File Attributes, allows Users to view and download the attributes of any file in the data library. This option is similar to the View/List Strategy File Layout option from the System Maintenance menu, option #20.




```
DSPFLDD-01                  File Field Descriptions                 8:43 A.M.
------------------------------------------------------------------------------
 File: PARM       Library: R20DATA    Format: RARM       Length:    500
 Reference file: *NONE        Number of fields:     97
 Field Description     Name       Alias      Length  Type    Act  Start      End
                                                             Lngth ---Position---
 LOAN NUMBER           ABLN                      9 ZONED     9,00      1        9
 ACTUAL P&I PMT NEEDED ABACPI                    8 PACKED   15,02     10       17
 ADJUSTABLE LOAN DESC  ABATYP                    2 CHAR        2     18       19
 INDEX DESCRIPTION     ABINDX                    2 CHAR        2     20       21
 RT CHG DT;ROLL F,B,R  ABDNU1                    7 CHAR        7     22       28
 INTEREST RATE FLOOR % ABMIN                     8 PACKED   15,13     29       36
 INT RTE FLOOR CUST    ABDNU2                    7 CHAR        7     37       43
 INTEREST RATE CEILING ABMAX                     8 PACKED   15,13     44       51
 RESERVED DO NOT USE   ABDNU3                    7 CHAR        7     52       58
 RATE REVIEW INCREASE  ABRICP                    8 PACKED   15,13     59       66
                                                                        More...
 Scan on field description _____________________
 Position to field/alias name __________    Start pos. _____    End pos. _____
------------------------------------------------------------------------------
 Red = null capable
 F2=Logicals  F6=Triggers  F7=End  F8=Print F10=New File Enter=Process Roll Keys
```

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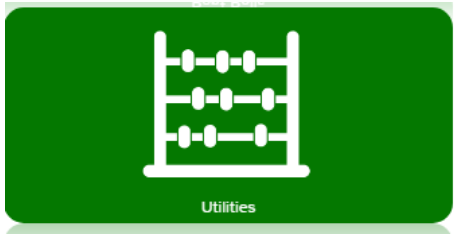
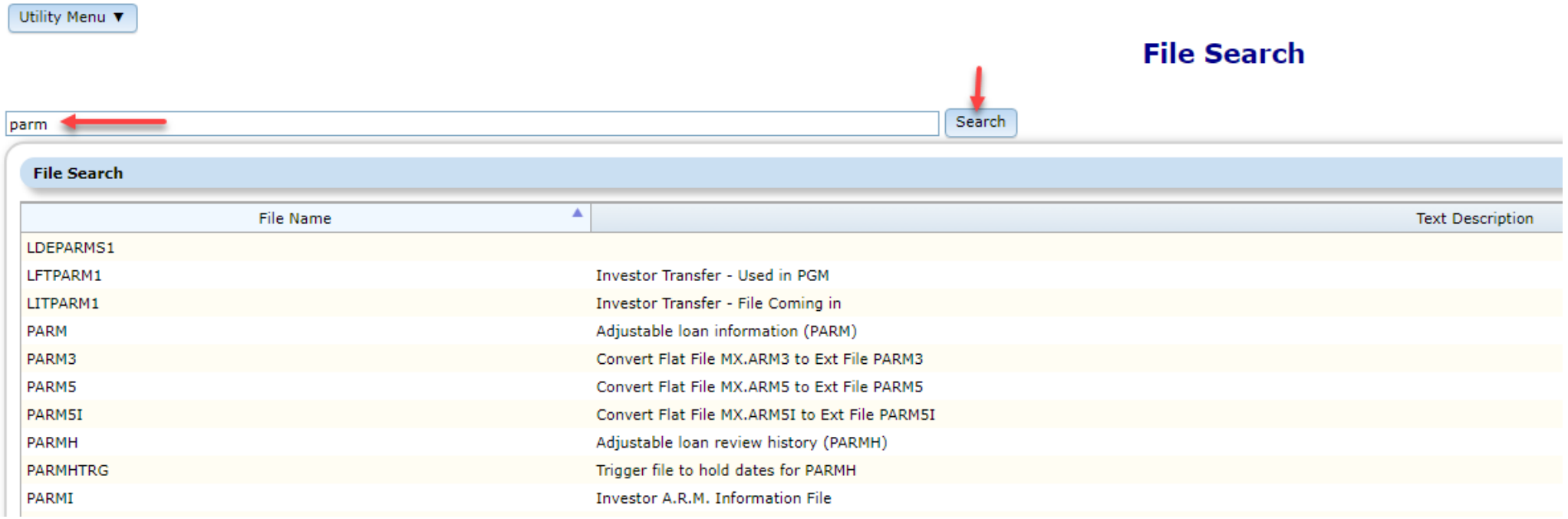
Utilities Widget



- File Attributes
  - Entering text in the search box will return all files where the string entered appears in the file name.



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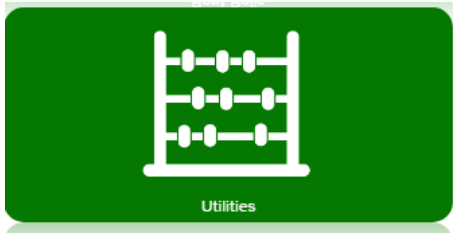
Utilities Widget



- File Attributes
  - Selecting a row in the File Search results display, will highlight the row and display the File Attributes window.

File Search

File Name	Text Description
LDEPARMS1	
LFTPARM1	Investor Transfer - Used in PGM
LITPARM1	Investor Transfer - File Coming in
PARM	Adjustable loan information (PARM)

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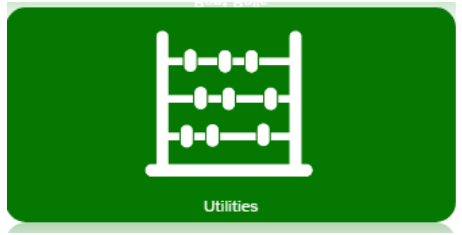
Utilities Widget



- File Attributes window displays in four sections:
  - File Field Description: File Name, Library, # of fields and file length
  - File Attributes: Scrollable grid displays name, description, data type and actual/character length
  - Logicals: The third section is a scrollable grid displaying the logical files that reference the selected fields
  - Triggers: Displays the triggers that are active against the selected file

File Attributes

Cancel

File Field Descriptions

File	PARM	**Library**	R20DATA	**Number of Fields**	97
Length	500	**Description**	Adjustable loan information (PARM)	**Last Altered Time Stamp**	09/29/2020 18:56:19

File Attributes

Ordinal Position	Name	Field Description	Column Text	Data Type	Length	Actual Length	Character Max Length	Column Default	Long Comment
1	ABLN	LOAN NUMBER	LOAN NUMBER	NUMERIC	9	9, 0	0	0	
2	ABACPI	ACTUAL P&I PMT NEED	ACTUAL P&I PMT NEEDED	DECIMAL	8	15, 2	0	0	
3	ABATYP	ADJUSTABLE LOAN DESC	ADJUSTABLE LOAN DESC	CHAR	2	2	2	' '	
4	ABINDX	INDEX DESCRIPTION	INDEX DESCRIPTION	CHAR	2	2	2	' '	
5	ABDNU1	Rt Chg Dt;roll F,B,R	Rt Chg Dt;roll F,B,R	CHAR	7	7	7	' '	

Logicals

Library	File	Dependent File Library	Dependent File	Dependency
R20DATA	PARM	R20DATA	VVTRIALV0	INDIRECT
R20DATA	PARM	R20DATA	LARM2	DATA
R20DATA	PARM	R20DATA	LA028	DATA

Triggers

Event File	Trigger Name	Trigger Library	Event Manipulation
PARM	TARMAD01	R20	DELETE
PARM	TARMAI01	R20	INSERT
PARM	TARMAU01	R20	UPDATE

Confidenti

Security

HAS A SECOND HOME IN THE PORTAL…

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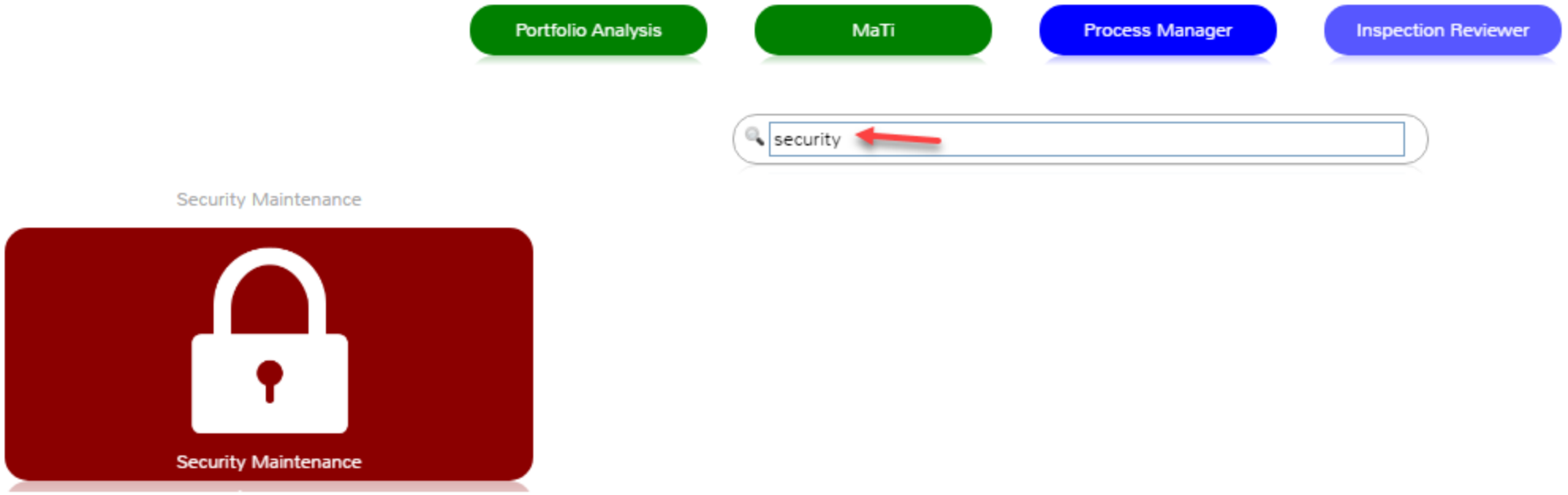
Security Widget



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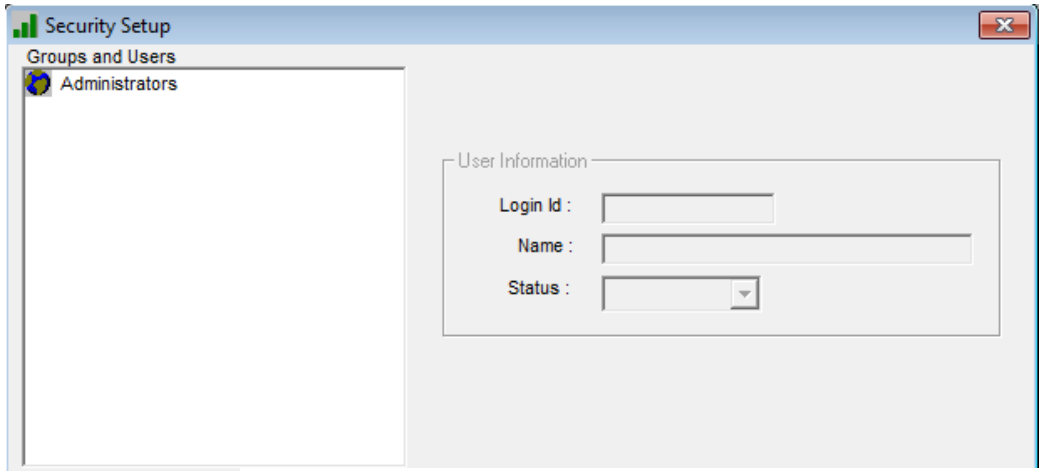
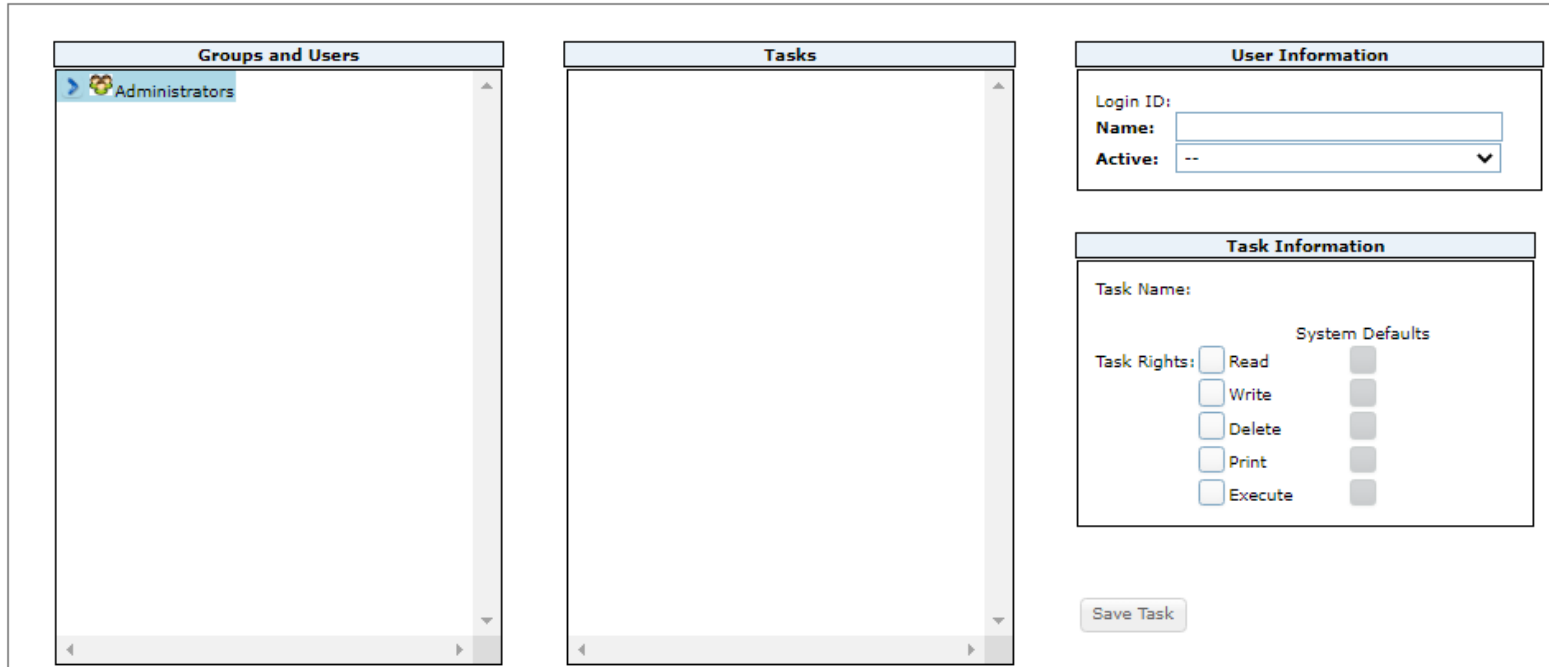
Security

Currently in CS
Tools→
Maintenance→
Security→
Security
Maintenance



CS

Security Maintenance



Portal

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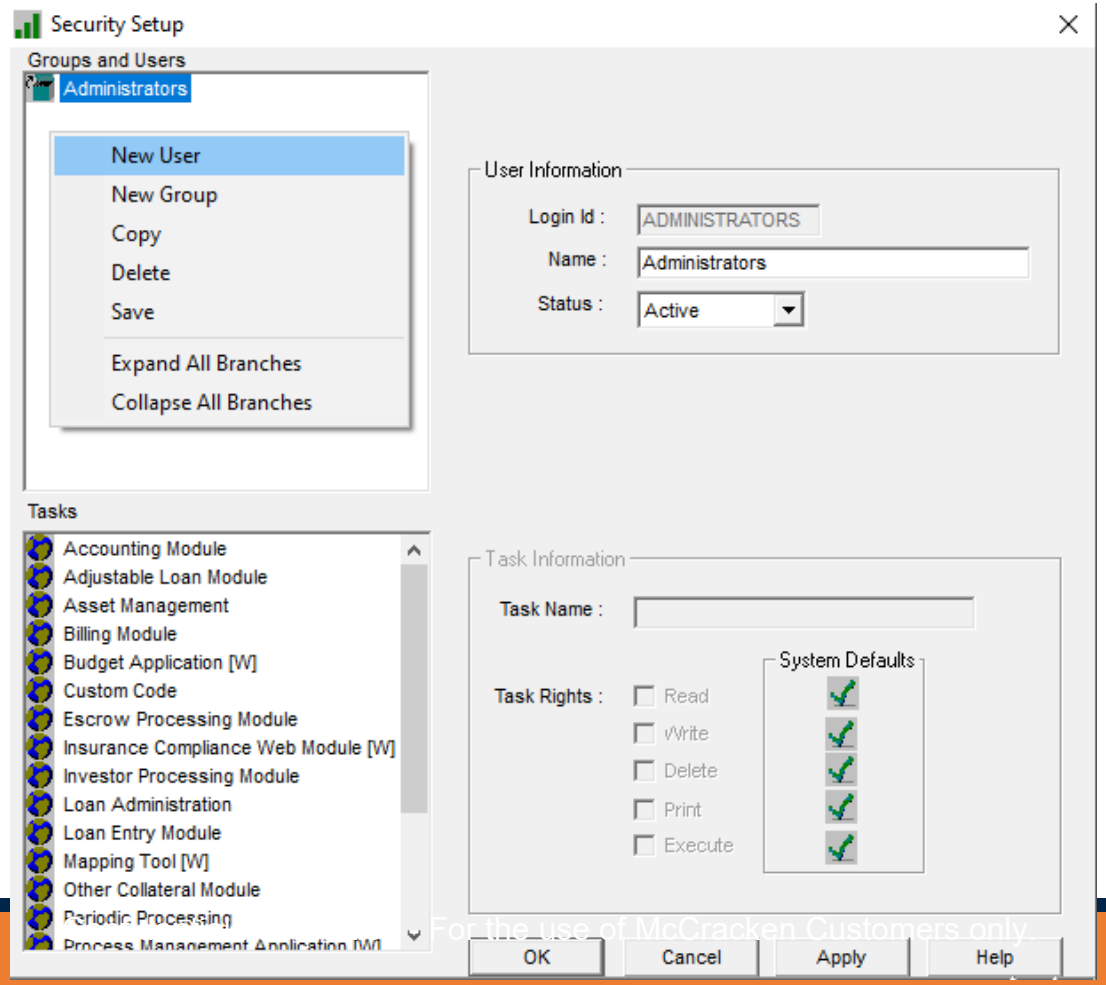
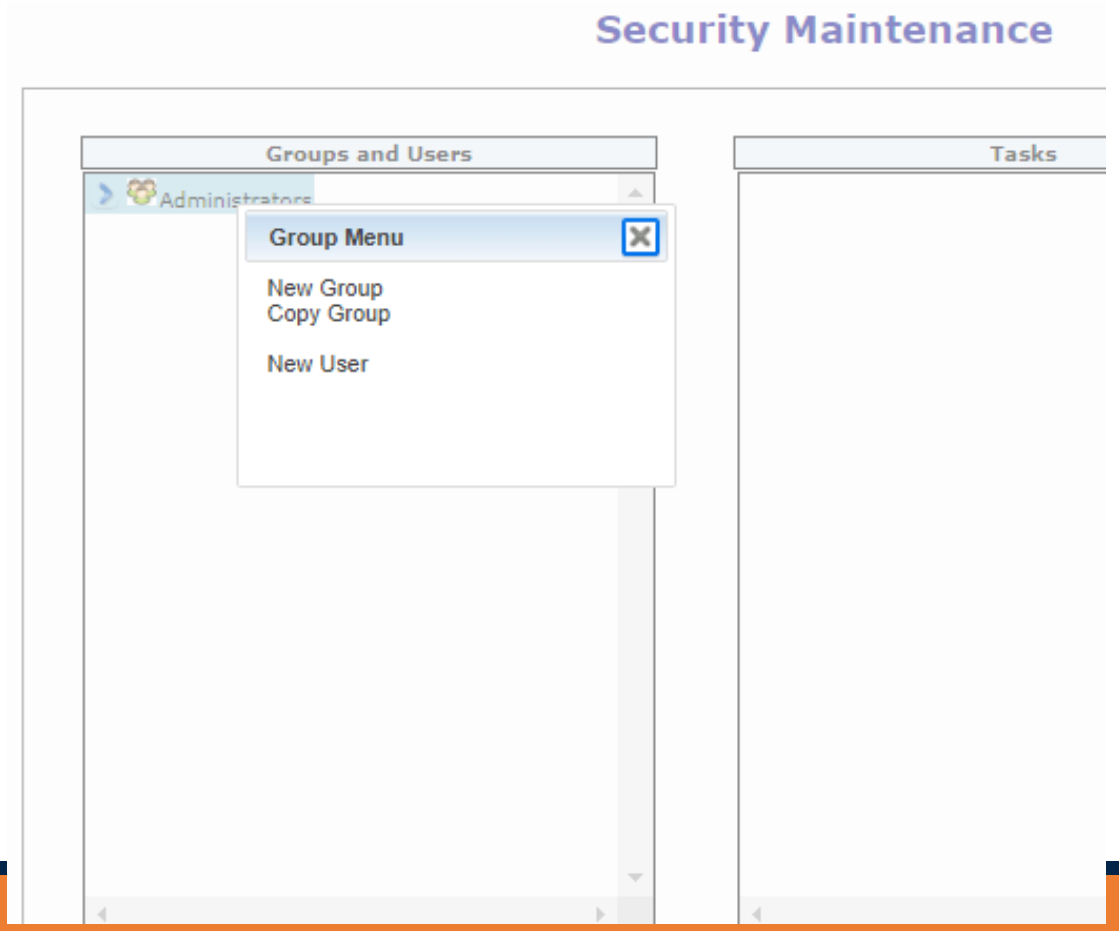
Security

Right Mouse options in both version to create a New User, New Group or copy a Group

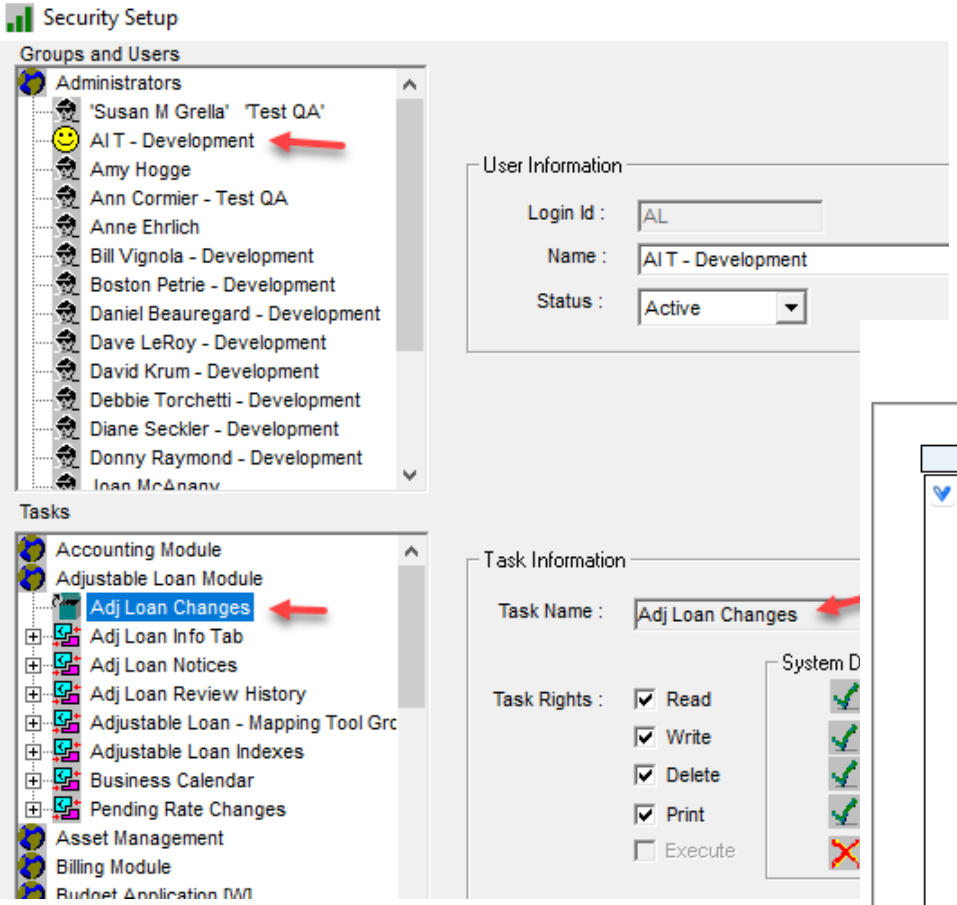


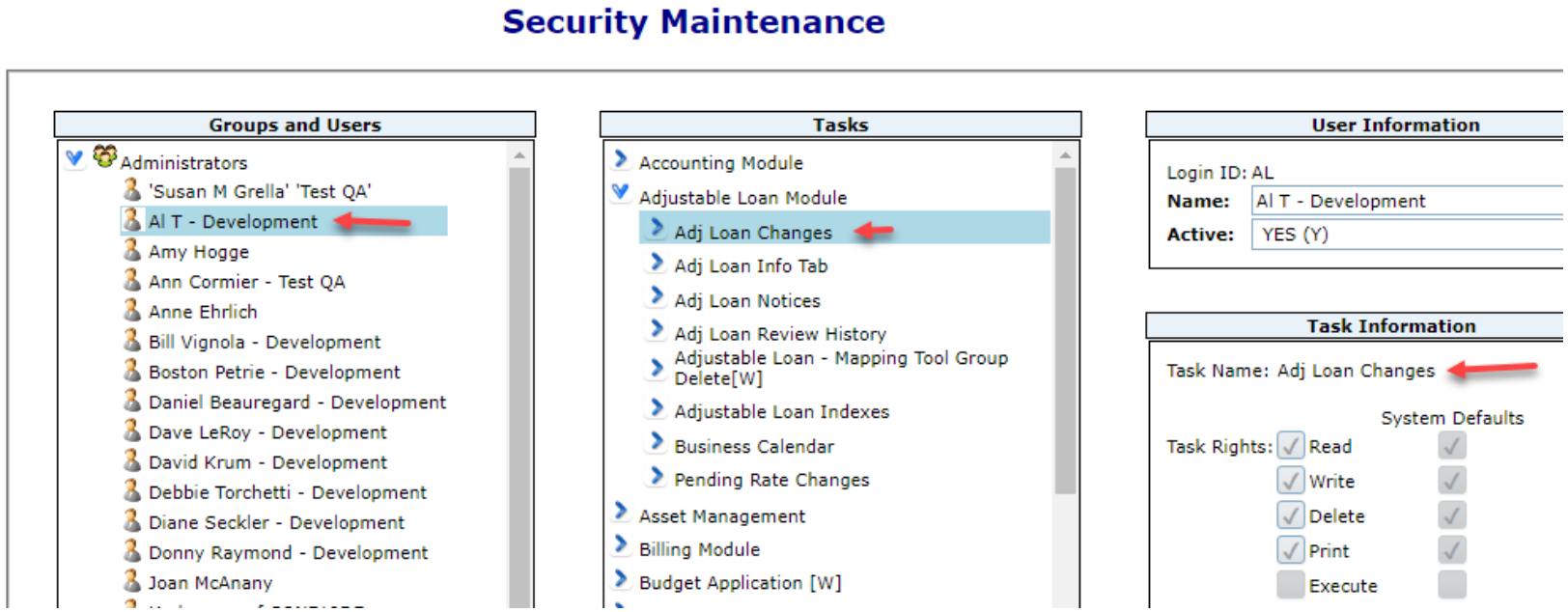


For the use of McCracken Customers only

Security

The same information is now in the widget





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Some New Widgets

ASSET MANAGEMENT AND OTHER COLLATERAL MODULE

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Asset Managements Items – turned into Widgets

- Asset Management
  - Environmental
  - Liens
- Other Collateral
  - Uniform Commercial Code – UCC
  - Collateral
  - Credit

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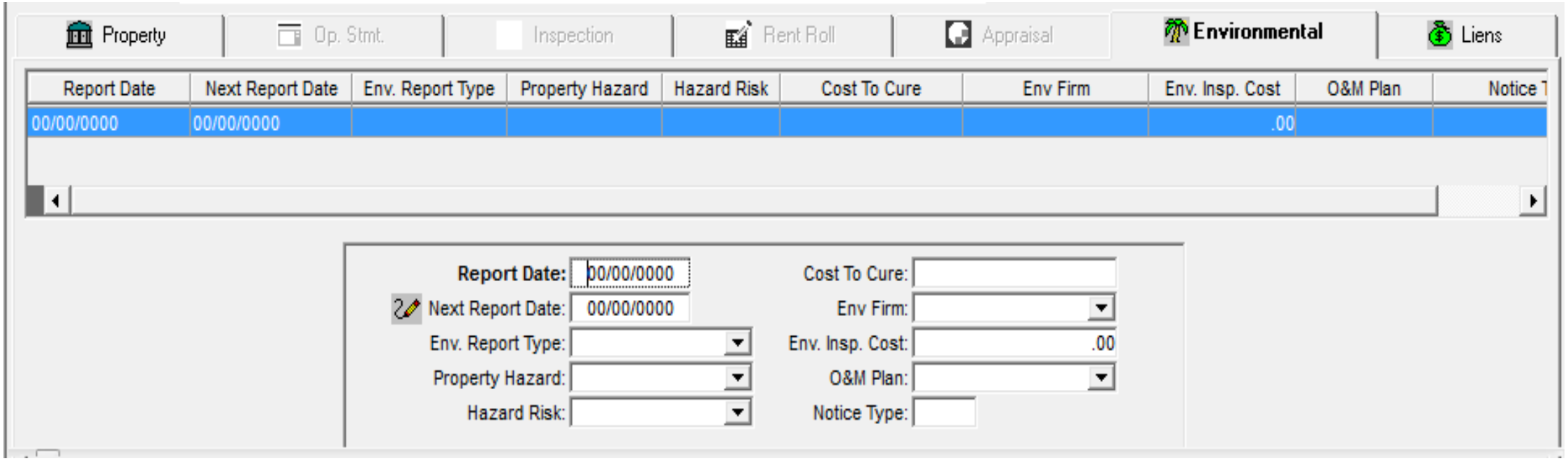
Environmental in CS



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Environmental Listing in the Portal

Search » Environmental Records List

Environmental

Cancel New

Report Date	Next Report Date	Env. Report Type	Property Hazard
02/04/2010	09/03/2010	PCNA (04)	
02/05/2019	09/03/2019	PHASE IION PAID BY (01)	

Welcome, DKRUM
Environmental

Listing

Hazard Risk	Cost To Cure	Env. Firm	Env. Insp. Cost	O&M Plan	Notice Type
	5,410		400.00	NO (N)	
	1,568		800.00	NO (N)	

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Environmental in the Portal

Search » Environmental Records List » Environmental Record

Welcome, DKRUM
Environmental

Environmental Edit

Ok | Apply | Cancel | Delete

Environmental Detail

Report Date		Cost To Cure	
Next Report Date		Env. Firm	
Env. Report Type		Env. Insp. Cost	
Property Hazard		O&M Plan	
Hazard Risk		Notice Type	

Most Recent Note

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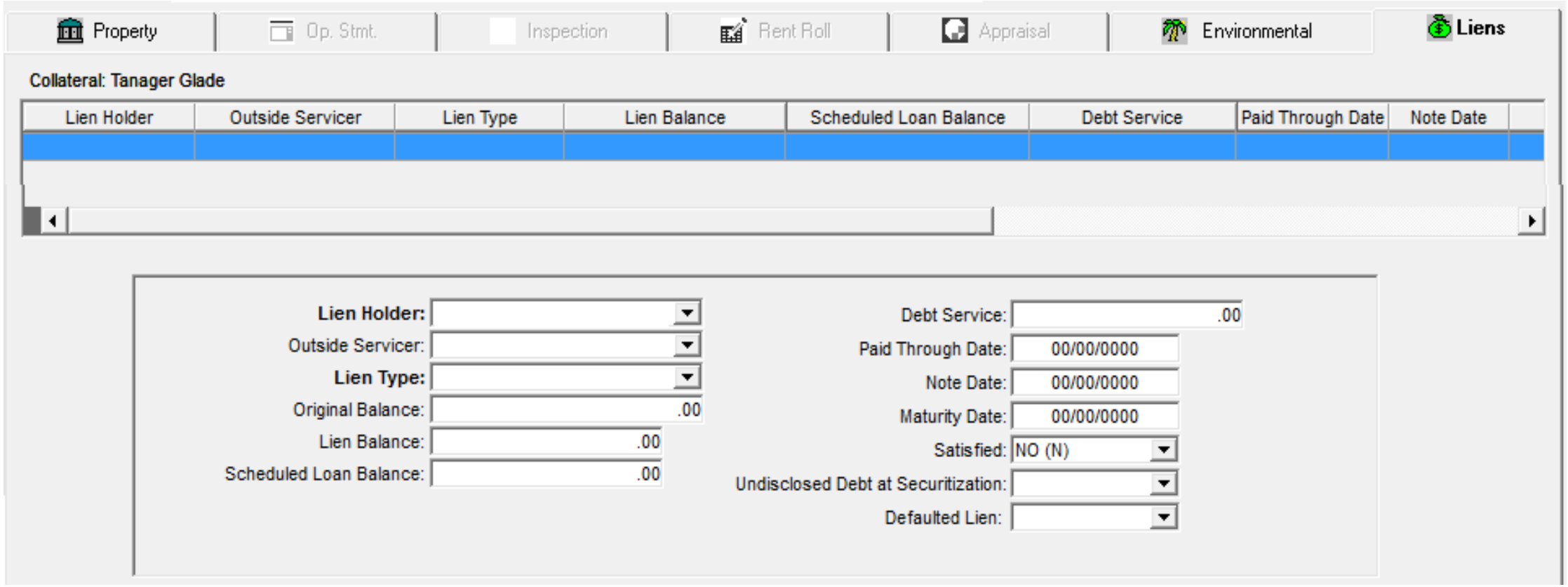
Liens in CS



Confidential Information - For the use of McCracken Customers only.

Liens in the Portal

Search » Liens Records List » Liens Record

Welcome, DKRUM
Liens

Liens Edit

Ok | Apply | Cancel | Delete

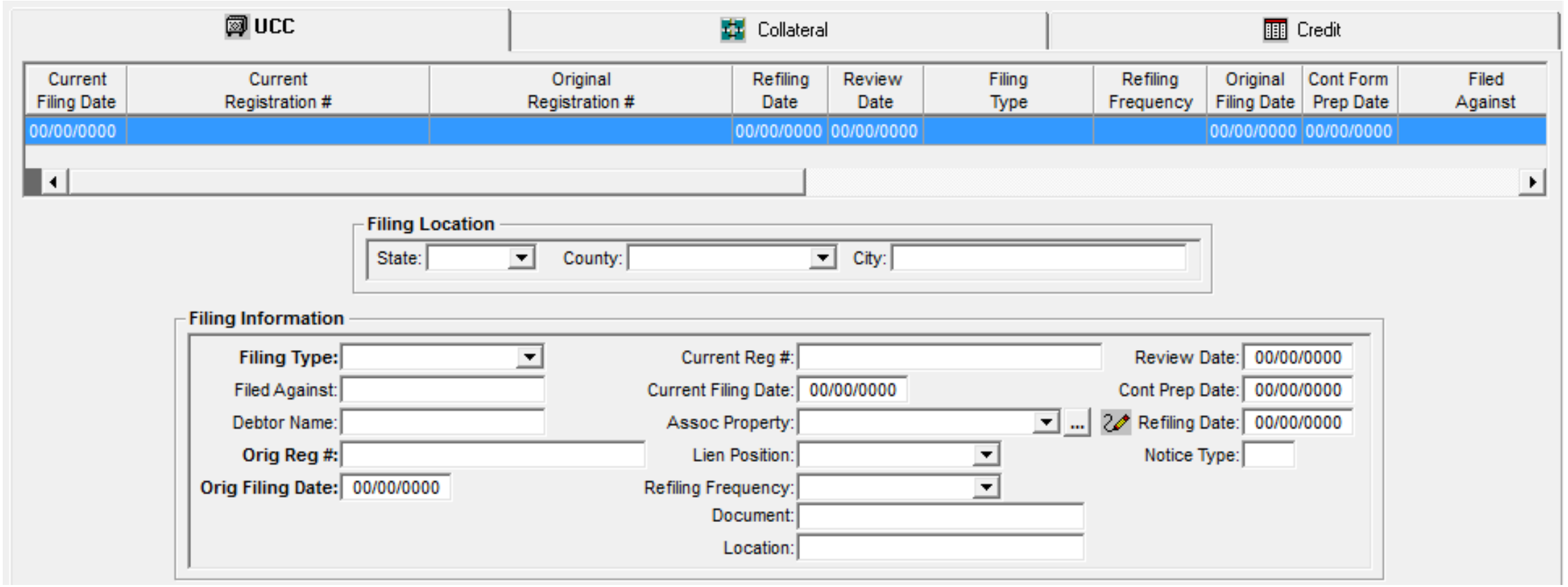
Liens Detail

Lien Holder		Debt Service	
Outside Servicer		Paid Through Date	
Lien Type		Note Date	
Original Balance		Maturity Date	
Lien Balance		Satisfied	
Scheduled Loan Balance		Undisclosed Debt at Securitization	
		Defaulted Lien	

Most Recent Note

Confidential Information - For the use of McCracken Customers only.

UCC in CS



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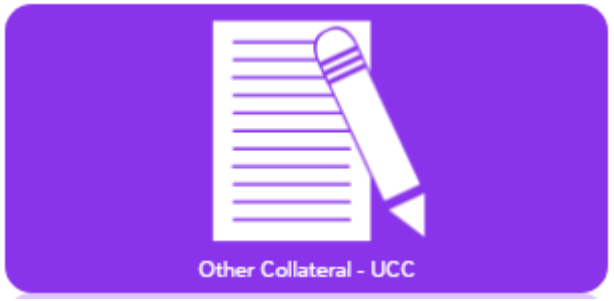
UCC in the Portal



Welcome, DRAYMOND
UCC

UCC Edit

Ok | Apply | Cancel | Delete

Filing Location

State | County | City

Filing Information

Filing Type		Current Registration #		Review date	
Filed Against		Current Filing Date		Cont Form Prep Date	
Debtor Name		Associated Property		Refiling Date	
Original Registration #		Lien Position		Notice Type	
Original Filing Date		Refiling Frequency			

Most Recent Note

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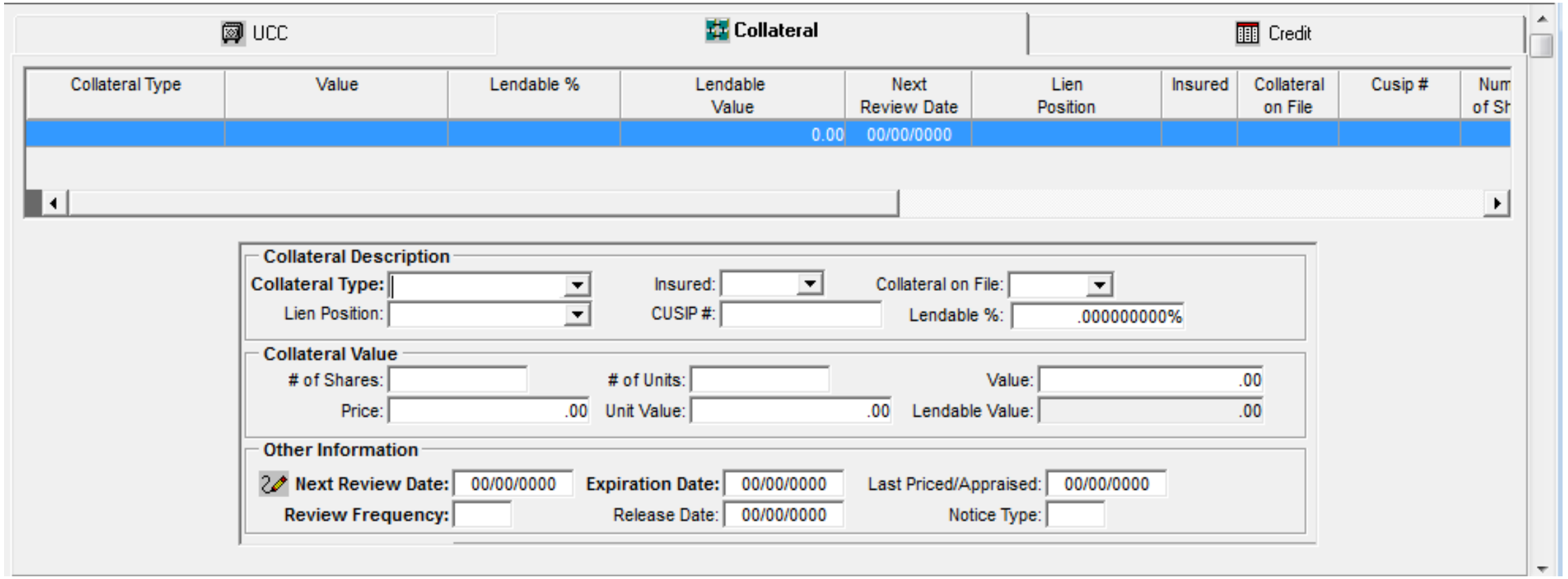
Collateral in CS



Confidential Information - For the use of McCracken Customers only.

Collateral in the Portal

Search » Collateral Listing » Collateral Edit

Welcome, DRAYMOND
Other Collateral

Collateral Edit

Ok | Apply | Cancel | Delete

Collateral Description

Collateral Type		Insured		Collateral On File	
Lien Position		CUSIP#		Lendable %	

Collateral Value

# of Shares		# of Units	0	Value	
Price		Unit Value	0.00	Lendable Value	

Other Information

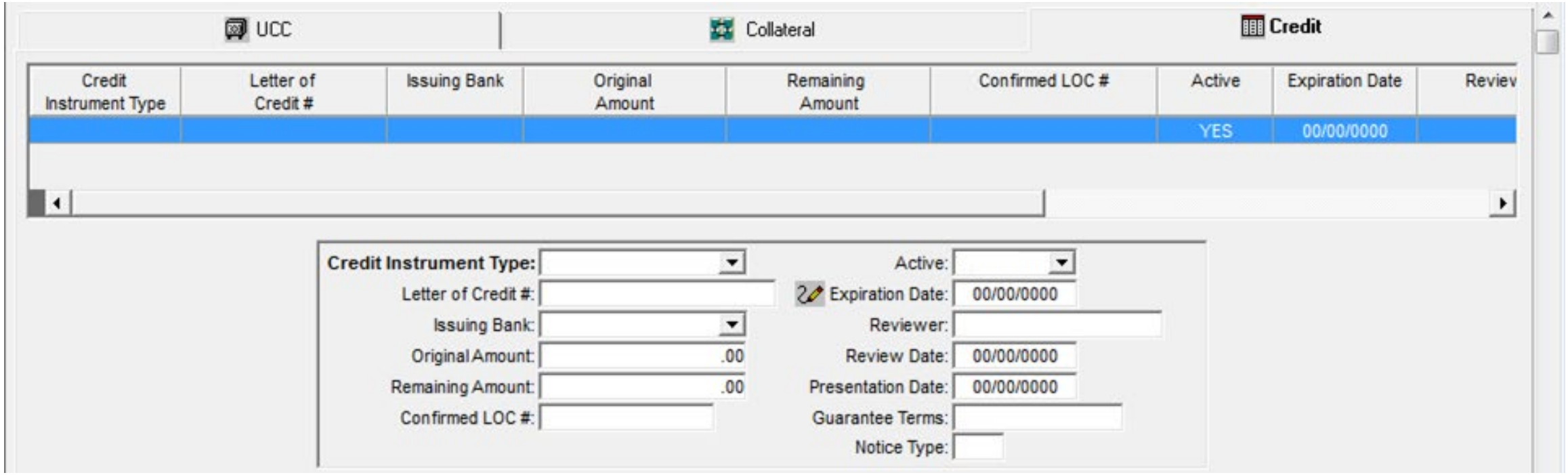
Next Review Date		Expiration Date		Last Priced/Appraised	
Review Frequency		Release Date		Notice Type	

Collateral Description

Release Conditions

Most Recent Note

Credit CS



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Credit in the Portal

Search » Credit Records List » Credit Record

Welcome, DRAYMOND
Letter of Credit

Credit Edit

Ok | Apply | Cancel | Delete

Credit Detail

Credit Instrument Type		Active	
Letter of Credit #		Expiration Date	
Issuing Bank		Reviewer	
Original Amount		Review Date	
Remaining Amount		Presentation Date	
Confirmed LOC #		Guarantee Terms	
		Notice Type	

Most Recent Note

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Additional Mentions

HIGHLIGHT INDIVIDUAL CHANGES

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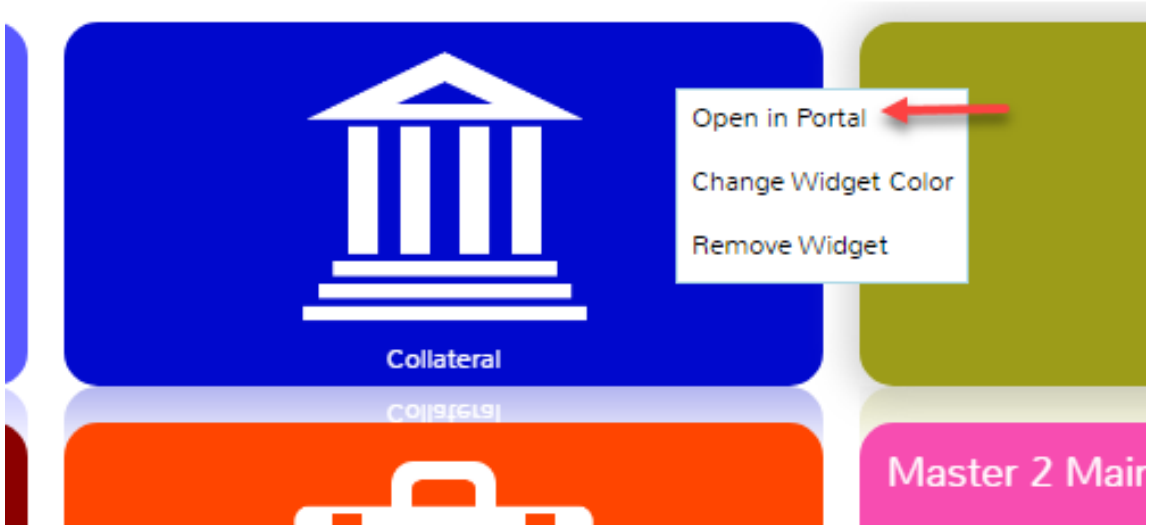
Dashboard- Widgets

Previous Release

Release 20 – When widget is selected, the default is to open in new window with the option to open in the Portal



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Process and Task Queue – New Alert

- Create a notification to alert the User when a new item enters their Process and Task Queue
  - When a new P&T widget is added to the Dashboard, an entry is created in the new notification file PPMNOTIF.
    - File PPMNOTIF will be checked upon sign on to see if any new records exists in the widget since the last check. If there are, then the notification icon will display on the Process and Task widget.

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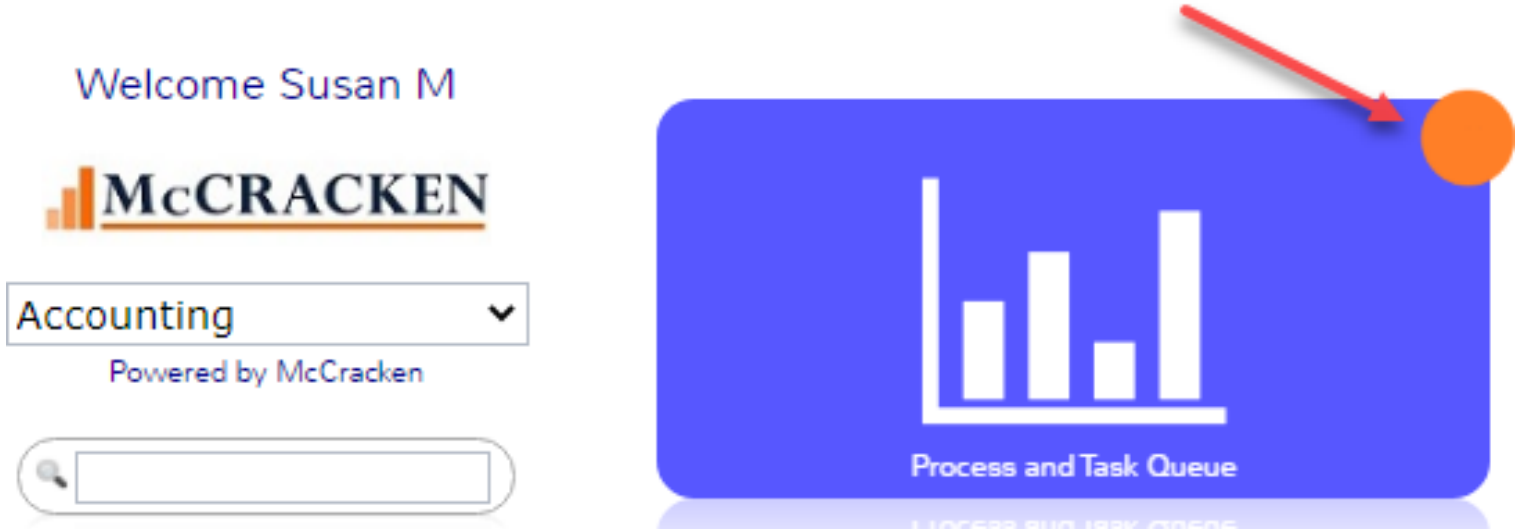
Process and Task Queue – New Alert

Upon opening the widget with a notification icon, the file PPMNOTIF is updated with the current time stamp, and the notification icon will be removed. The file is not checked again until next time the User signs into the Portal



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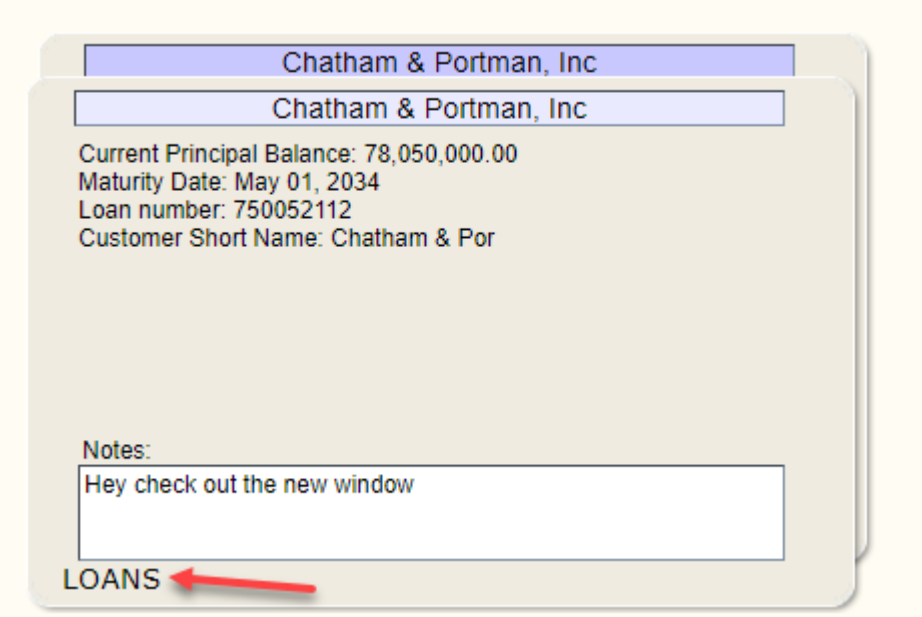
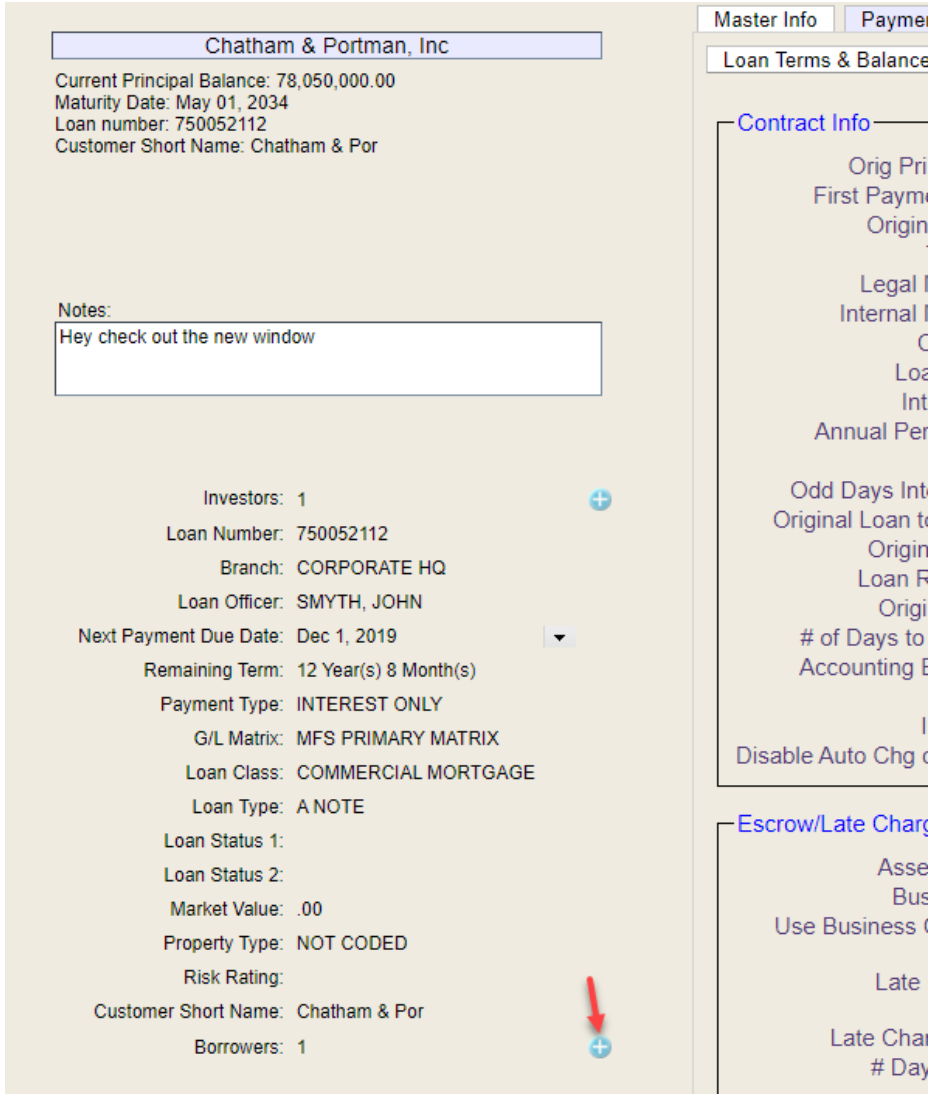
Portfolio Analysis

- Additional Borrower Information Added
  - From the Card Deck, select the Loans Card.
  - Select the ⊕ to the right of Borrowers





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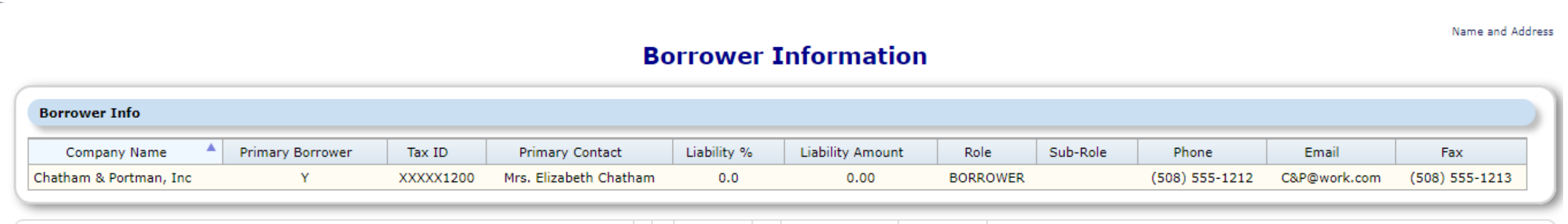
Portfolio Analysis

Borrower Information

- Grid Displays the Borrower Names, Roles, Sub Role, address, phone, email, address and TIN which is limited to display just the last 4 digits



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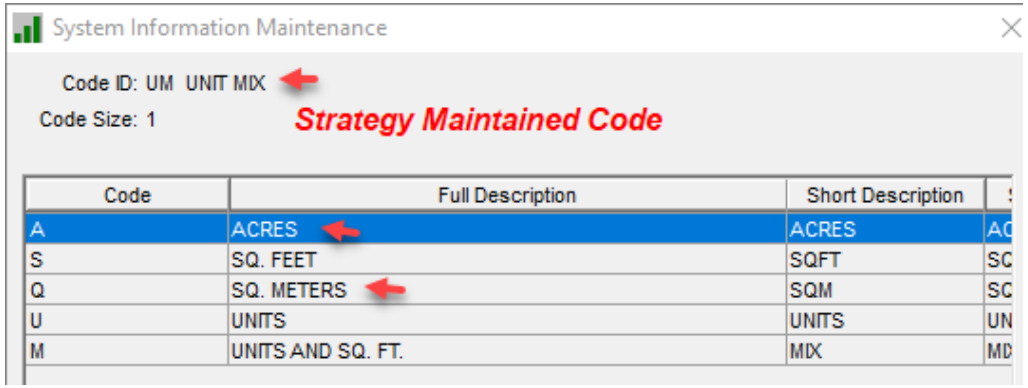
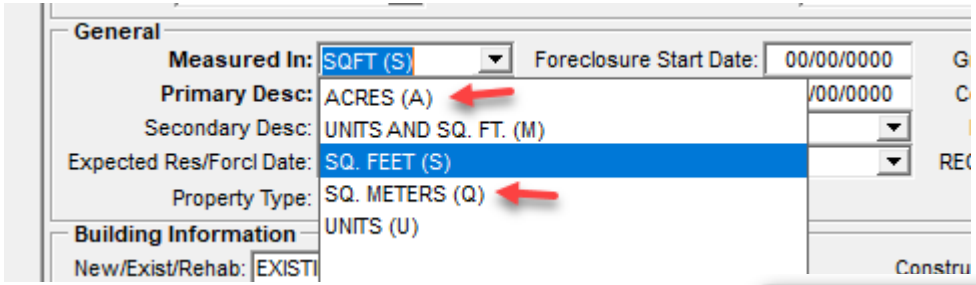
Collateral - New Additions

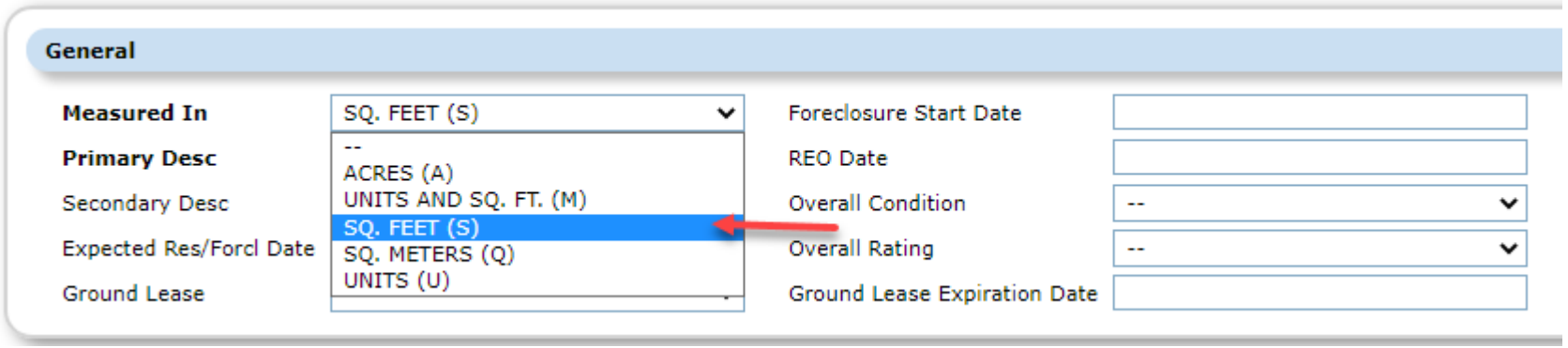


In the Collateral, General Info section, the Property Measured in Field now includes additional options for selection



CS

Portal



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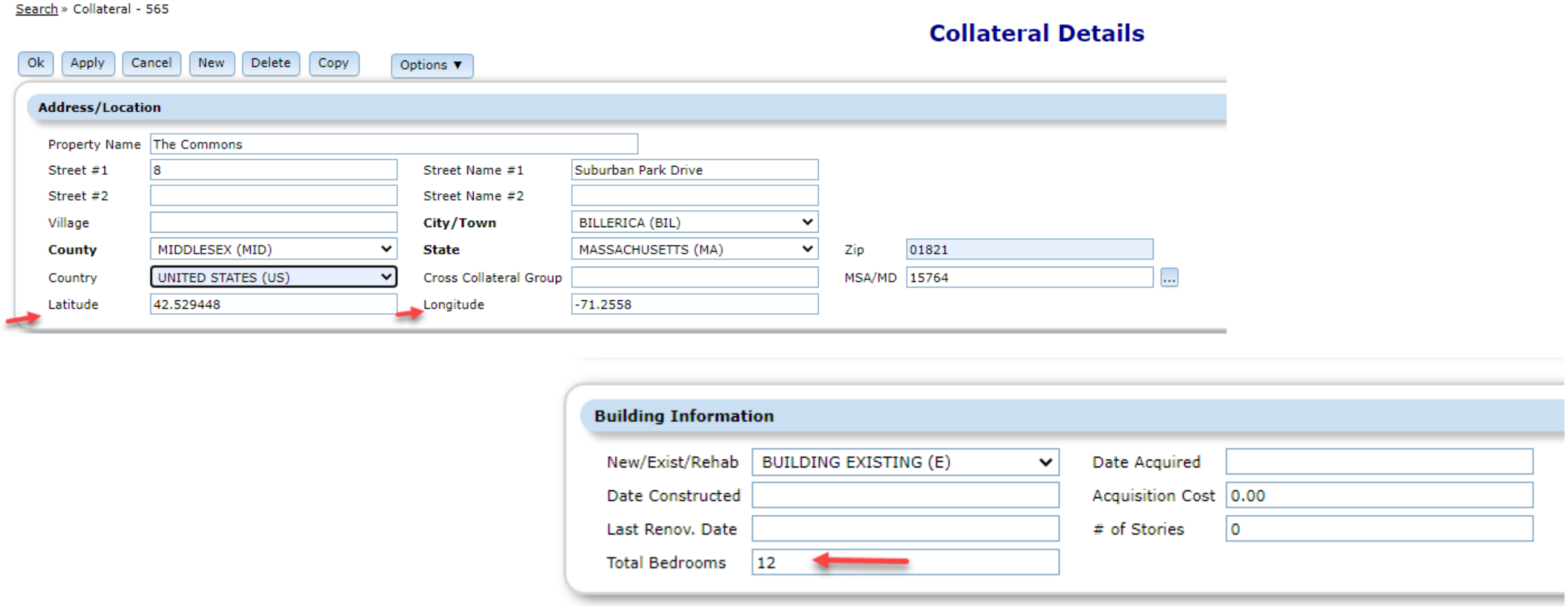
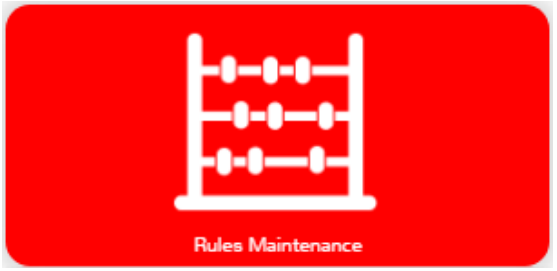
Collateral Widget – Fields Added

Collateral Widget has been modified to allow Users to enter, update and view Geo Codes for latitude and longitude pin-point a properties location and assist with identification of special hazards and regulatory compliance

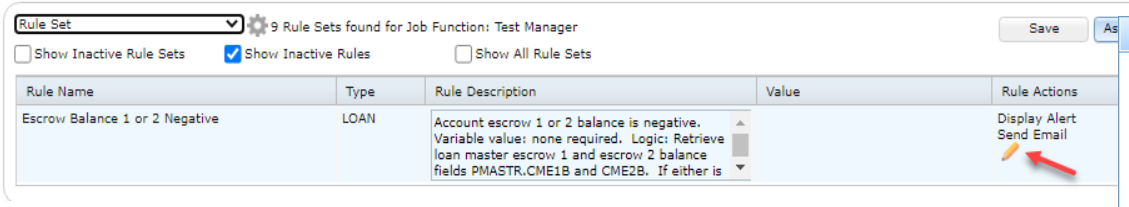


Confidential Information - For the use of McCracken Customers only.

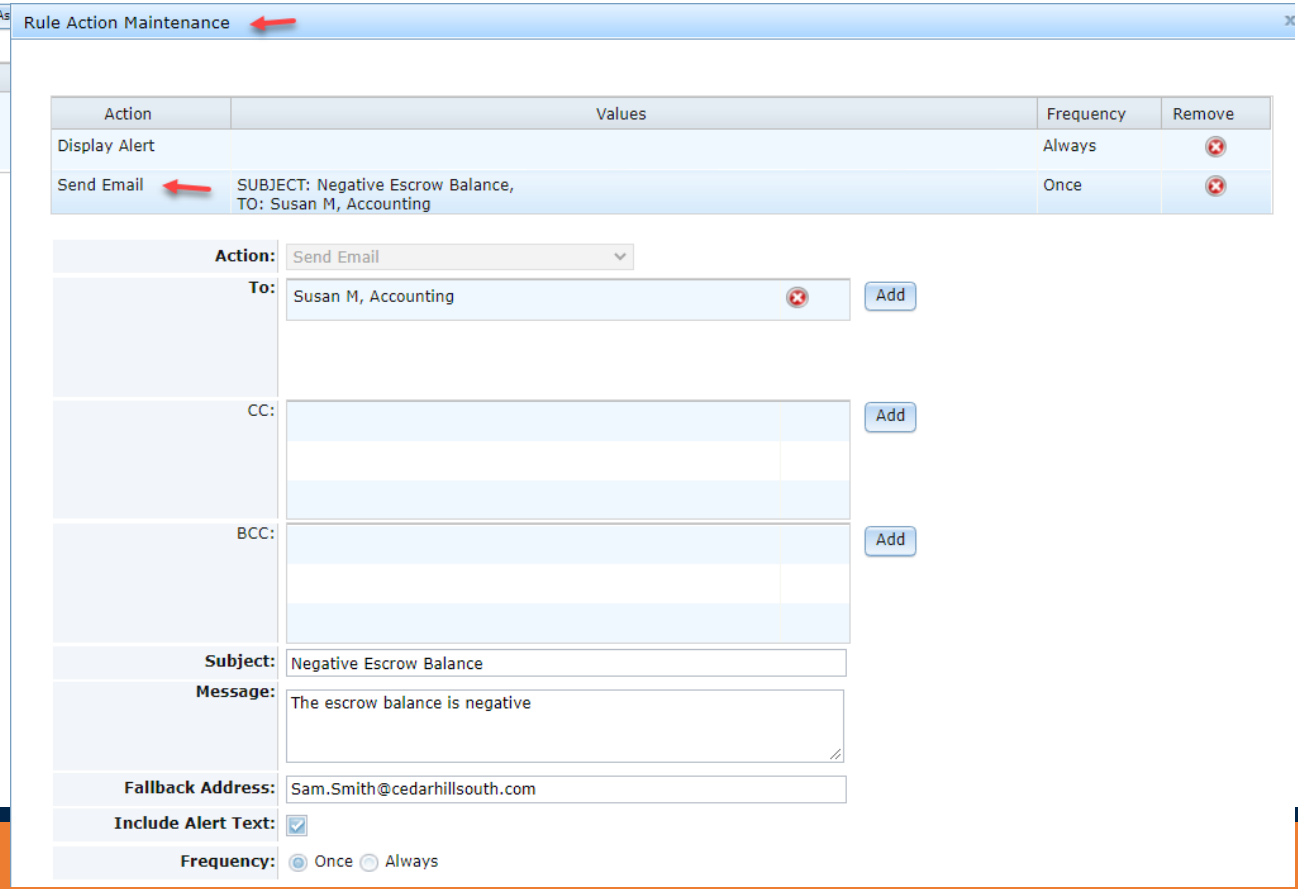
Rules Maintenance



In the email message, the Loan # and Name will be included



The rule needs to be set up with a 'Send Email' alert



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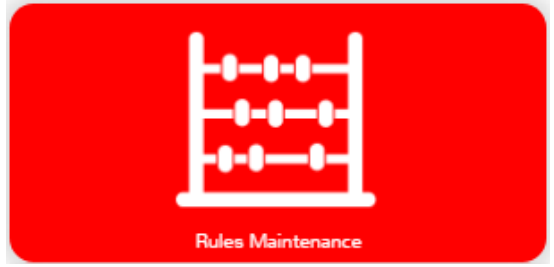
Rules Maintenance



Loan Number and Name have been included in the Email

-----Original Message-----
From: noreply@MCCRACKENFS.COM <noreply@MCCRACKENFS.COM>
Sent: Friday, July 23, 2021 3:31 PM
To: Sue Grella
Subject: Negative Escrow Balance

The escrow balance is negative
Account escrow 1-tax or 2-insurance balance is negative

Loan Number: 30020110
Borrower Name: Harrington Innovations

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Rent Roll

13 Fields added to Unit Mix Detail section to allow better tracking of the price, sale and proceeds associated with the sale of individual units

Unit Mix Details

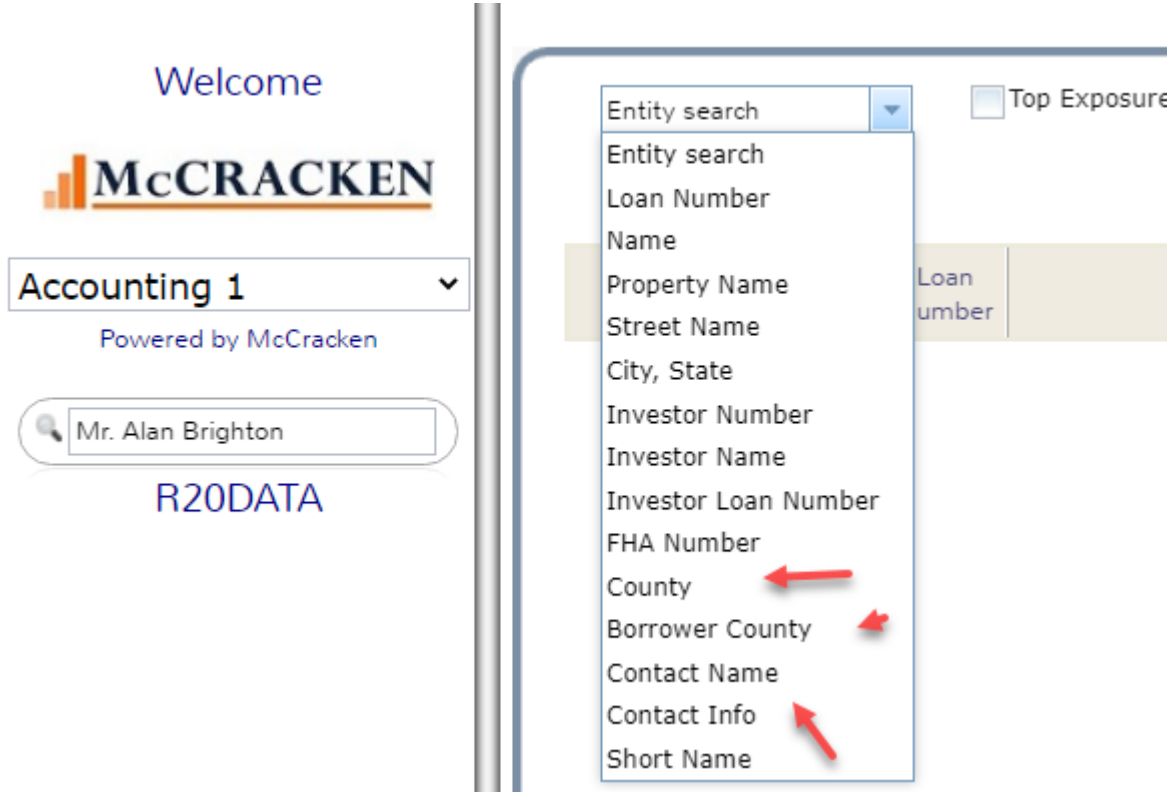
Unit Description	Unit Detail Description	# of Units	# of Rooms	# of Bedrooms	# of Bathrooms	Square Feet/Unit	Rent/Unit/Month	Rent/Square Foot/Month
		0	0	0	0.0	0	0.00	0.00

Unit Description		Unit Detail Description		# of Units	0	# of Rooms	0
# of Bedrooms	0	# of Bathrooms	0.0	Square Feet/Unit	0	Rent/Unit/Month	0.00
Rent/Square Foot/Month	0.00	Unit Price/Month	0	Price/Unit/Month	0.00	# of Units Occupied	0
Unit Measure		Rent Frequency		Mkt Rent/Unit/Month	0.00	Space Use	
# Beds	0	Bed Type		Cost/Bed/Day	0.00	Avg Daily Rate	0.00
Total Square Feet	0	Total Rent/Day	0.00	Total Rent/Month	0.00	Indep/Congreg Unit Mix	0
Assisted Living Unit Mix	0	% Sold for Coops	0.000%	% Sponsor Owns for Coops	0.000%	Unit Type	
Non Revenue Units (Y/N)		Date Received		Date Applied		Date Released	
Tax Parcel		Unit Number		Sales Price	0.00	Min. Release Price	0.00
% of Gross	0.000%	% of Gross Amt.	0.00	Net Sale Proceeds	0.00	Gross Sales	0.00
Amount Received	0.00	Unit Status					

Portal Search Changes

- Super Search: County (Collateral), Borrower County, Contact Name, Contact Info (email & phone number) and Short Name

Default is the last search option that was used…Select another search option from dropdown



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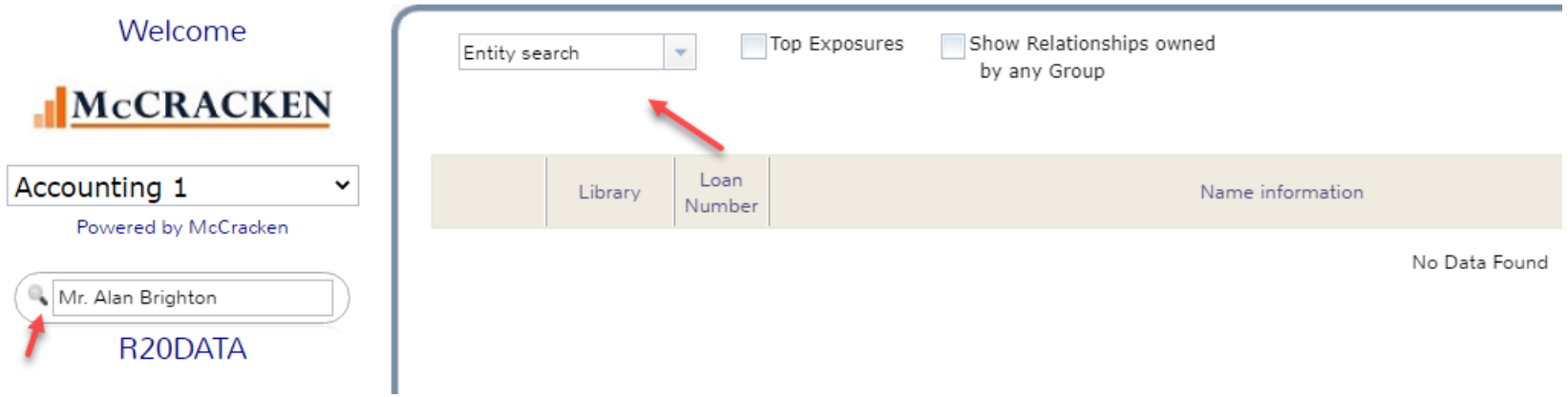
Portal Search Changes

- Contact Name -

Enter contact in the Super Search box->Click on the search icon



Select Contact Name from dropdown->Search again

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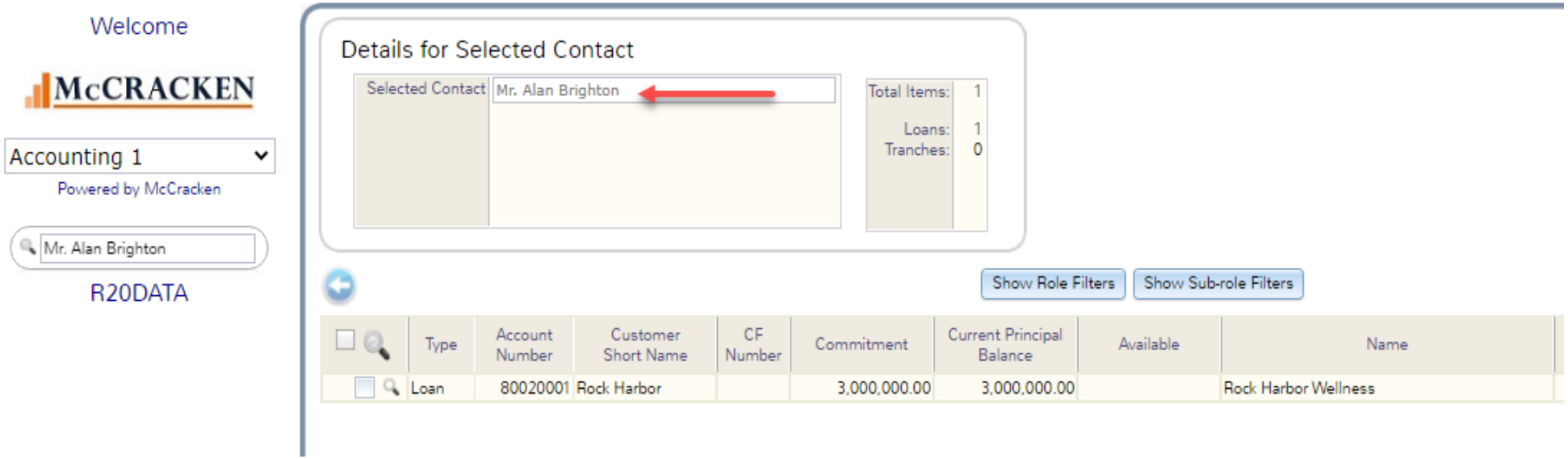
Portal Search Changes

- Contact Name -

- Contact Search returns all loans where the contact name is used.
- Select record to open



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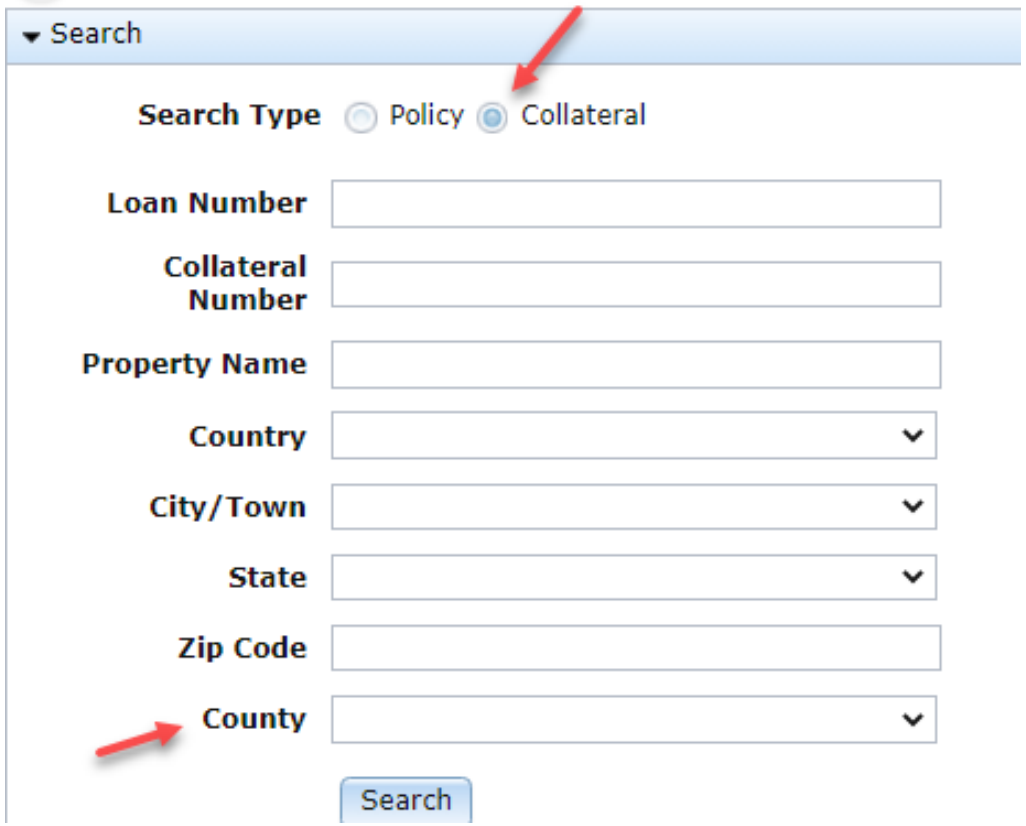
Portal Search Changes

- Portfolio Analysis
  - County (Collateral), Borrower County, Contact Name, Contact Info (email and phone number), Short Name and FHA Project #

- Insurance Widget
  - County (added when the Collateral radio button is selected)



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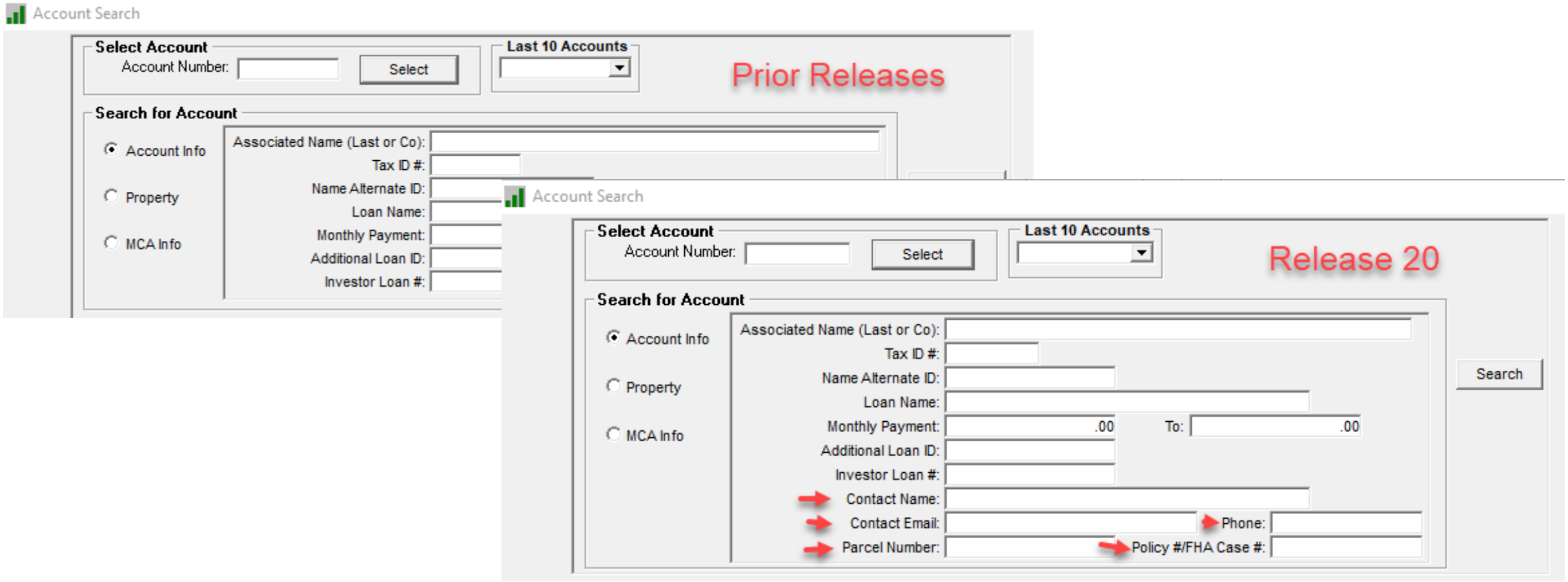
Loan Search Changes

- Enhance Search to add the ability to search by Contact Name, Contact Email, Contact , Parcel # and Policy#/FHA Case #



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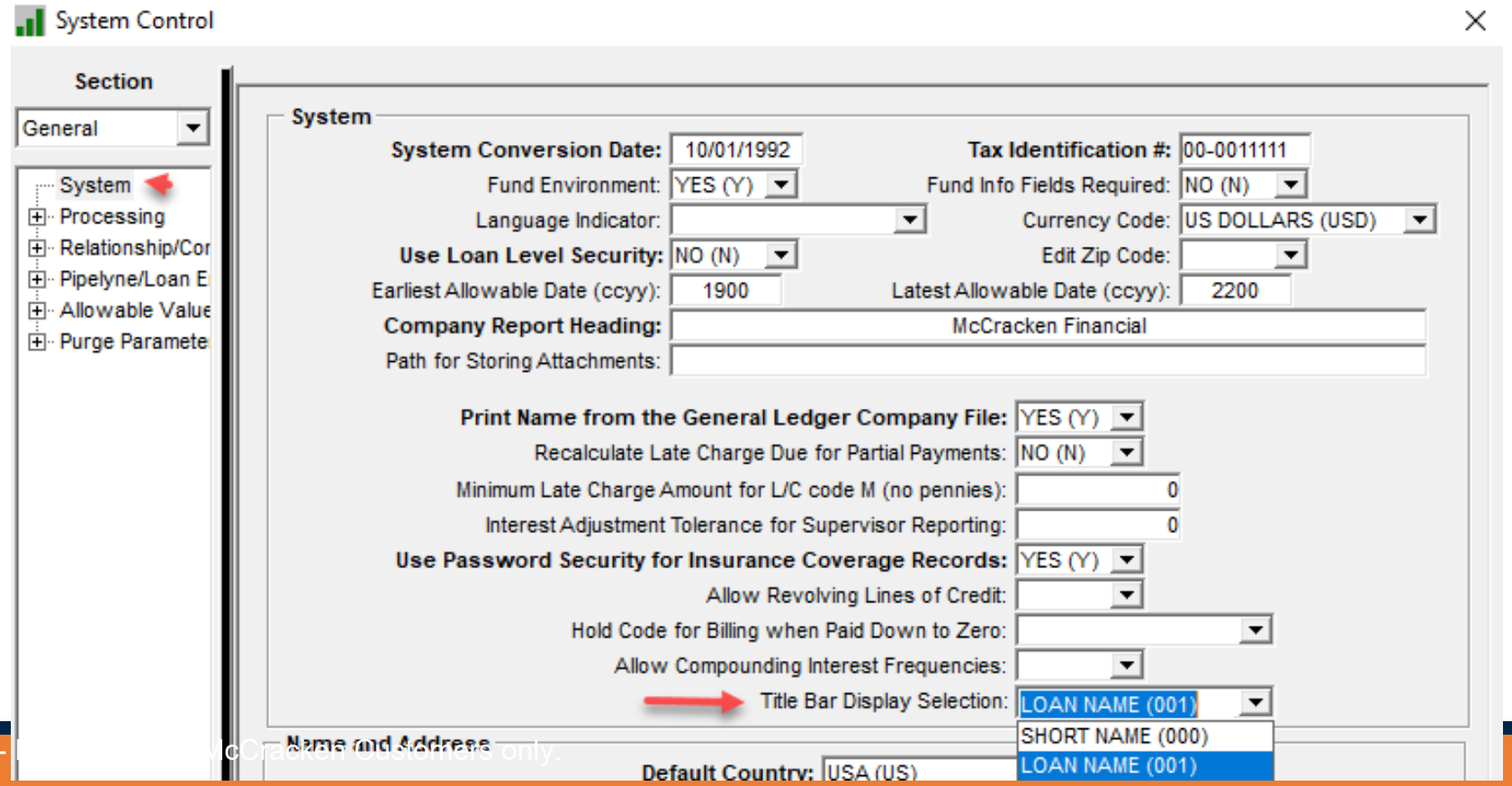
Title Bar Change

System Control Setting – General -> System will control what displays in the Title Bar in CS

2 Options: Short Name or Loan Name

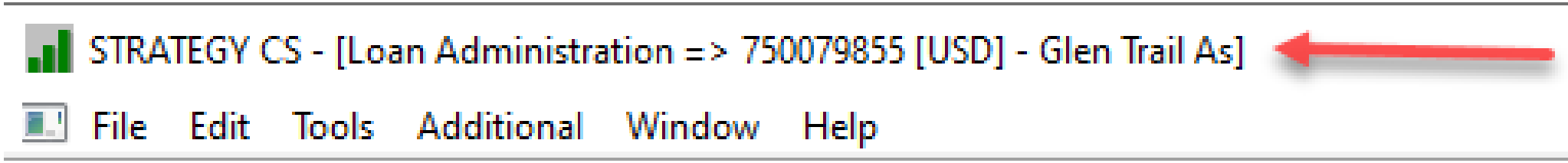


Confidential Information - [redacted] McCracken Alliance only.

Title Bar Change

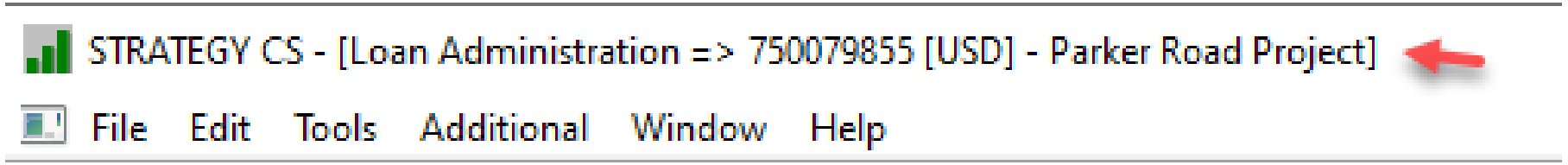
Short Name

CMSNAM.PMASTR (Master File) –
13 characters



Loan Name

CSLOANNM.PCIF (Customer Info)
– 40 characters



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Field Expansion

GENERAL LEDGER COMPANY NUMBER, COST CENTER AND OFFICER CODE

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Field Expansion

- Fields that expanded
  - G/L Company Number (PINFO Table ID - V4)
    - Changed from 2,0 to 10,0
  - Cost Center (PINFO Table ID - 72)
    - Changed from 4 positions to 10 positions
  - Officer Code (PINFO Table ID – 21)
    - Changed from 2 positions to 5 positions

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General Ledger Company - Vendor

G/L Company # is a numeric field expanding from 2 to 10 positions

Records will be converted to contain proceeding zeros

Vendor Maintenance

G/L Company #	Name	Contact	Address Liine 1	Address Liine 2	City
0000000052	MFS Sold Participant 1		8 Suburban Park Drive		Billerica
0000000005	MFS Sold Participant 2		8 Suburban Park Drive		Billerica
1234567891	MFS Sold Main	Mary S	98 Smith Road	Building #2	Billerica
0000000001	MFS Sold Loans		8 Suburban Park Drive		Billerica
0000000004	MFS Sold IDA Loans		8 Surburban Park Drive		
0000000003	MFS Sold Daily Remit		8 Surburban Park Drive		
0000000009	MFS Misc Other Loans		8 Surburban park Drive		
0000000007	MFS Master Service		8 Surburban Park Drive		
0000000075	MFS IRP Investor F1		8 Subruban Park Drive		
0000000051	MFS Internal Participant		8 Suburban Park Drive		
0000000002	MFS Internal Loans		8 Surburban Park Drive		
0000000066	MFS H2		8 Surburban Park Drive		

System Information Maintenance

Code ID: V4 GENERAL LEDGER COMPANY NAME

Code Size: 10

Strategy Maintained Code

Code	Full Description	Short Description
0000000003	MFS Sold Daily Remit	MFS SOLD D
0000000004	MFS Sold IDA Loans	MFS SOLD I
0000000001	MFS Sold Loans	MFS SOLD L
1234567891	MFS Sold Main	MFS SOLD M
0000000052	MFS Sold Participant 1	MFS SOLD P
0000000005	MFS Sold Participant 2	MFS SOLD P

Code: 1234567891

Short Description: MFS SOLD M

Full Description: MFS Sold Main

Sort Description: MFS SOLD M

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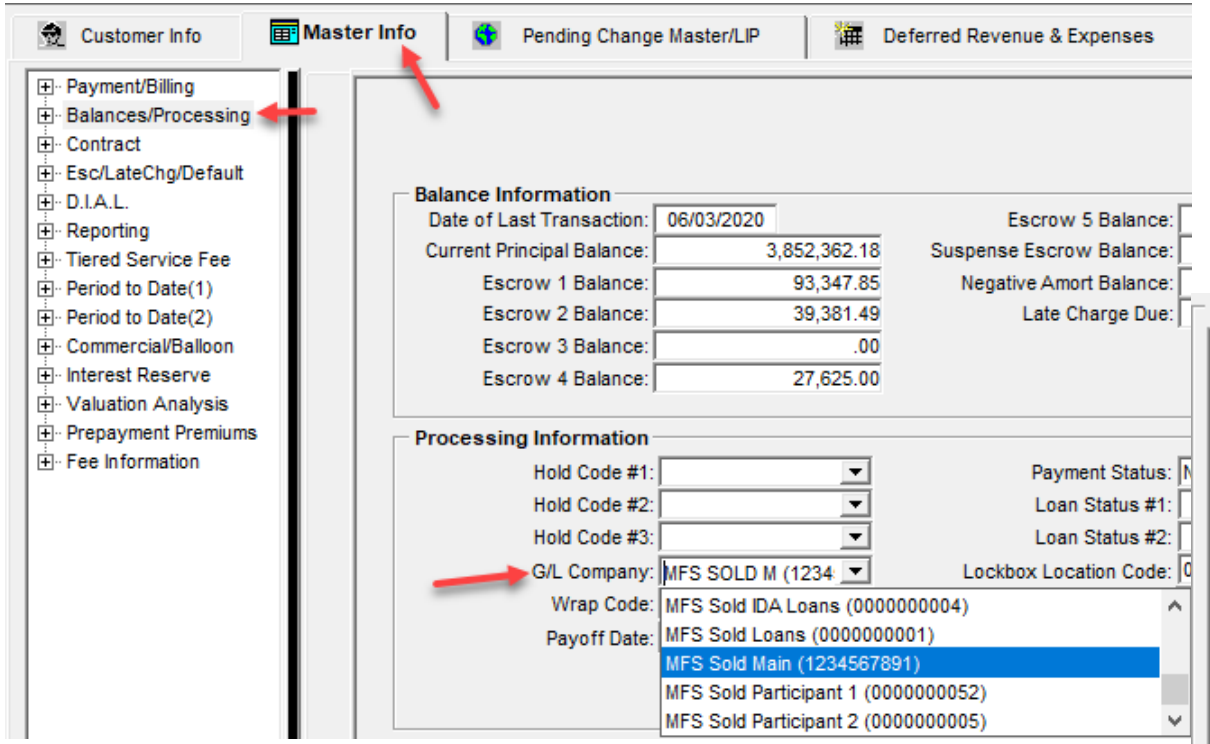
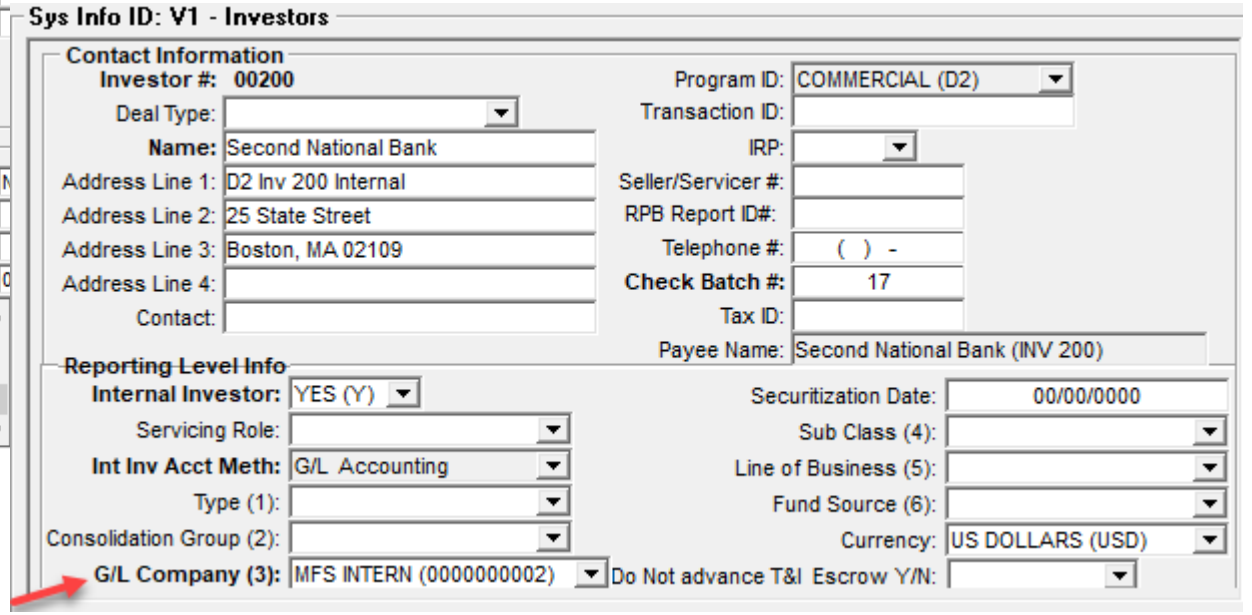
General Ledger Company

This field is visible in other windows/files – Refer to the Highlights for Release 20





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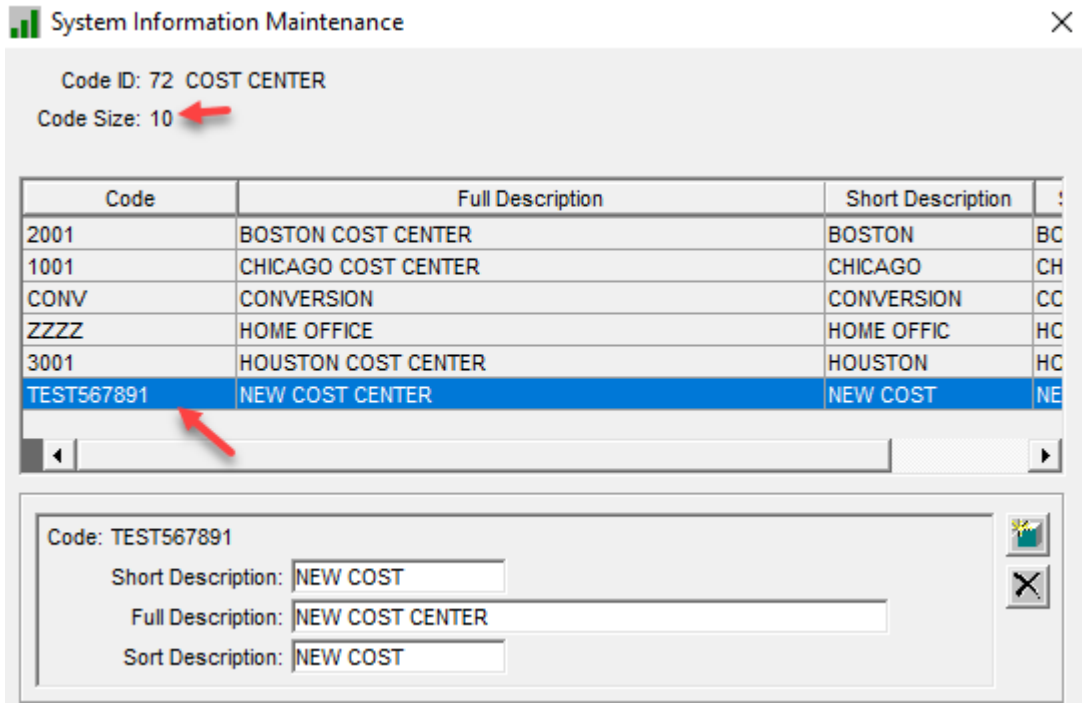
Cost Center – System Information Table 72

Cost Center is an alpha, numeric, alpha/numeric field expanding from 4 to 10 positions



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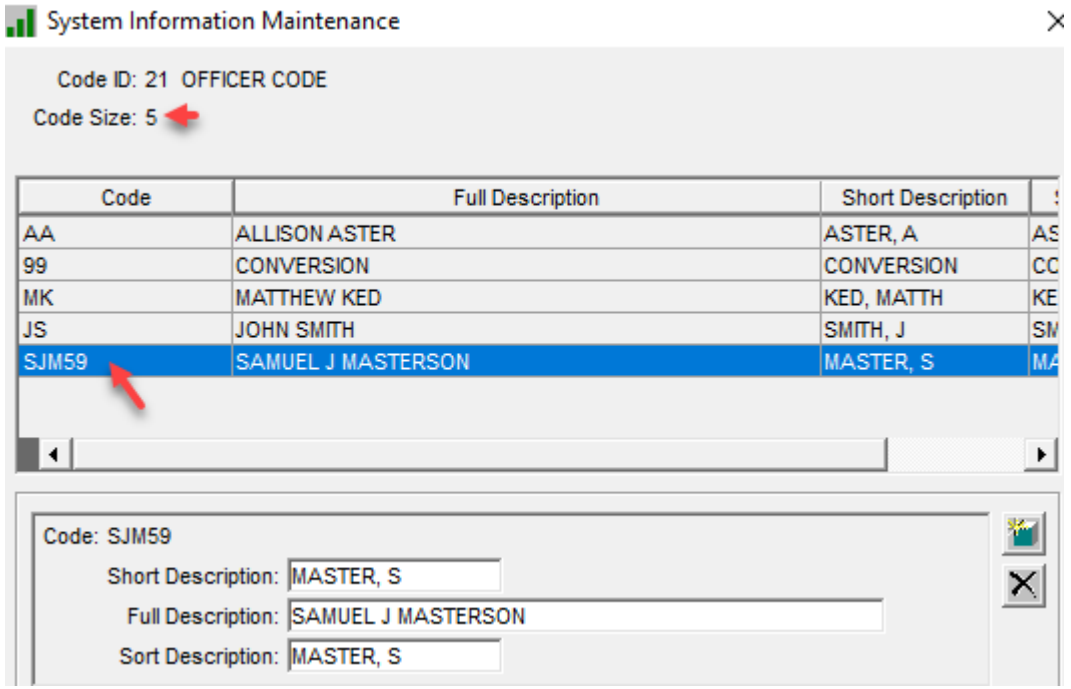
Officer Code – System Information Table 21

Officer Code is an alpha, numeric, alpha/numeric field expanding from 2 to 5 positions



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Next Step

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Next Step

- Refer to MFS website for the Release 20 Highlights and Content Listing
  - User ID and password are required
  - If you need access to site, see your system administrator for more information on how to register
- Customer Support works directly with every customer, so when you're ready to begin your planning phase, submit a request to Support.

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Questions?

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