Report Delivery

In the past, delivering your appraisal often meant plowing through reams of paper, juggling two or more printers, fiddling with little plastic binders, and then jumping in your car to run it over to your client's office.

Today, the vast majority of appraisals are being delivered electronically. Typically, this involves printing the report to a PDF file, then attaching it to an e-mail message. WinTOTAL Athena pioneered a new, streamlined method of report delivery through its EDI center. Now, Aurora is poised to again revolutionize how appraisers interact with their clients through a combination of innovative report delivery options:

- **Outlook or other e-mail** – Appraisers who want to deliver reports directly to their customers in a PDF format, or share WinTOTAL files with other appraisers, can use this option. Using the industry standard Messaging Application Programming Interface (MAPI), WinTOTAL can interact with your default e-mail application much as it once did with the EDI Center. Report delivery is still integrated with the PDF-creation process and information from the report is still added to your accompanying e-mail message – just as you were familiar with in Athena.
- **SureReceipts** – This innovative — and more secure — technology delivers your report through a password-protected web page. This method of delivering appraisal reports provides two distinct advantages over simple delivery using e-mail. First, you get immediate notification when your customer receives the report. Second, your customer doesn't have to sift through his spam-laden Inbox to locate your report.
- **XSites Network** – If you're using the XSites Network to receive and track appraisal orders — whether from your XSite or from one of the network's partners, like RealEC or Rels — then this delivery method is the one to use. Reports are uploaded to the XSites Network and the status is immediately reflected in your online order management system.

To begin the delivery process, click the **Send** button in the top toolbars, click the drop-down arrow beside the **Send** button and select a delivery method, or select a delivery method from the **Deliver Report** menu.

Default Delivery Methods

Before you use the report delivery tools in WinTOTAL, you should set the default method you'd like to use to help you save time in future deliveries. To set your default delivery method…

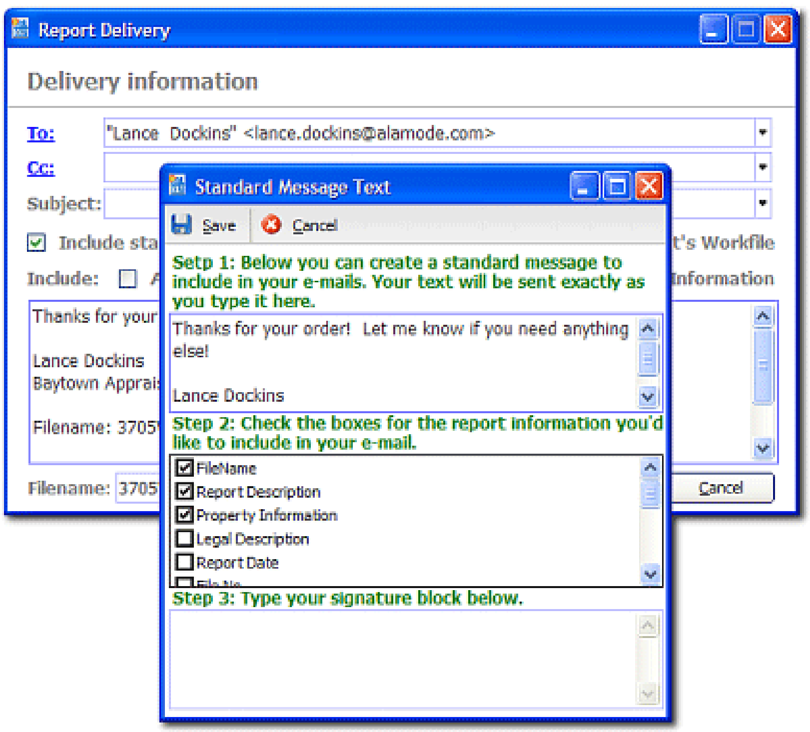
1. Click the **Deliver Report** menu and select **Send Report Options** in either WinTOTAL or the Appraisal Desktop.
2. Mark the option in the list beside the report delivery method you plan to use most often. If you'd like the system to default to whatever method you used last, mark the **Remember what I did last time** option.
3. Click **OK** to save your default.

Hint: Even though you've set a default, you can always choose any of the delivery methods by choosing it from the **Deliver Report** menu, or by clicking the down arrow to the right of the **Send** button in WinTOTAL or the Appraisal Desktop.

Message Templates

Using standard message text in reports you deliver via e-mail can be a great way to consistently send a standardized message to your clients while still including report specific information in each message. To set up your standard message text:

1. Begin delivering your report using any of the e-mail methods described in this chapter and click **Edit standard message text** in the **Delivery Information** screen.



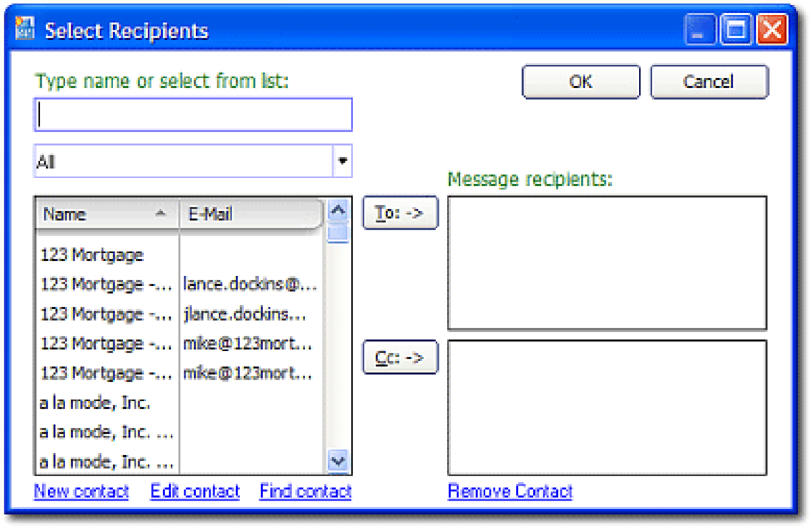
2. Type the standard message you'd like to include in the e-mail message whenever you send a report in the first text box.
3. Check any of the report items you'd like to insert into the message.
4. Finally, type your "signature block" in the last text box and click **Save**.

Now, each time you send a report, this standard text is automatically inserted into the message and you can easily edit this text in the future if necessary.

Select E-mail Recipients

When sending reports and files using WinTOTAL's report delivery tools, you can access your contacts database so you can quickly find and select recipients. This ensures that you don't have to look up their contact information in other databases. In addition, since the Contacts Database can synchronize with your XSite's Contacts Database you can ensure that you always have the most up-to-date address information available in all locations. To use the Contacts Database to address your e-mails…

1. From any of the **Delivery Information** screens that appear throughout the various delivery wizards, click any of the **To** or **CC** links your WinTOTAL address book.



2. If you know the name of your recipient, begin typing it in the first text field. As you type, the list below sorts and displays any records that match the letters you're typing. Or, use one of the following methods to find, add, or remove contacts from your address book.

   - Select a filter from the drop-down list to filter your contact list to those that just fit a certain type.
   - Click **Find Contact**, type a search phrase, and click **Find** to search for contacts. If you find one you like, click it and click Insert to include it in your message.
   - Click **New Contact** to add a new contact to your address book. Once you've filled out the necessary contact information, click **OK** to save the contact.
   - Click a contact and click **Edit Contact** to edit the contact's information.
   - Click a contact and click **Remove Contact** to remove it from your address book.

3. Once the desired contact is displayed in the list, double-click the name to add it to the **To** section of the **Message recipients** field. Or, select the name and click the **Cc:->** button to add it to that section.

4. Repeat these steps to add as many recipients as necessary.

5. When you've found all the desired contacts, click **OK** to add their e-mail addresses to your e-mail message.

Hint: If you create any new contacts as you're selecting recipients, don't forget to synchronize those changes with your XSite by using the synchronization tools in the Appraisal Desktop.

E-mail Delivery

Athena's EDI Center was a ground-breaking tool for its time. When this version was released, most appraisers did not have their own e-mail tools. Or if they did, they often came with severe limitations on the size of attachments. So the EDI Center and our Proj2000 e-mail services made a lot of sense.

Prior to the release of Aurora, though, the landscape shifted. Now, an overwhelming majority of appraisers utilize tools like Microsoft Outlook to handle all of their e-mail. Even now, WinTOTAL can automate report delivery through Outlook or your other default e-mail program in much the same way that Athena did with the EDI Center. There are two primary methods of delivering e-mail through e-mail:

- Delivering PDF's

- Delivering WinTOTAL reports

The method you choose depends entirely on the intended recipient of your report.

Deliver PDF Reports

PDF's are files that anyone can view. As such they are best suited when delivering your reports to your clients. If you're delivering your report to someone you want to update the report, delivering a WinTOTAL report should better suit your needs.

Hint: Unprotected PDF's are still subject to tampering after you've delivered them. To ensure that no one tampers with the PDF copy of the report you send, see the PDF Options & Security section of this user guide.

To deliver a PDF report through Outlook or regular e-mail...

1. Once you've completed and signed your report in WinTOTAL, from the menus, choose **Deliver Report**, **PDF Using Outlook or Regular E-mail**. Or, if you've configured this as your default delivery method, just click **Send** in the toolbar.

   Note: See the Default Delivery Methods section of this user guide for more information about configuring your delivery default.

2. Complete the necessary fields in the **Delivery Information** screen. To save time, you can automatically fill in most of these items based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.

3. For the address fields, you can choose a recipient from your WinTOTAL Contacts Database. Click the **To** or **CC** link and double-click the appropriate contact to add that person to your **Message Recipients** list. Then, click **OK**.

4. You can also insert text directly into the e-mail message using information from your report. Check the **Include standard message text** box.

   Note: For more information about using Message Templates, see the respective section of this user guide.

5. There are two remaining options to add automated text to your message. Check either **Acrobat download instructions** or **XSite Order Manager Information** to automatically insert the respective instructions that explain these useful tools to your customer.

6. If you use WinTOTAL's digital workfile feature, you can have a copy of the PDF file automatically added to it. This ensures that you always have an exact copy of the report you send to your customers. Check the **Save PDF to report's Workfile** box to enable this feature.

7. Click **Finish** and then select the forms you'd like to include in your report from the screen that appears.

8. Set any other options as necessary and then click **OK** to deliver your message.

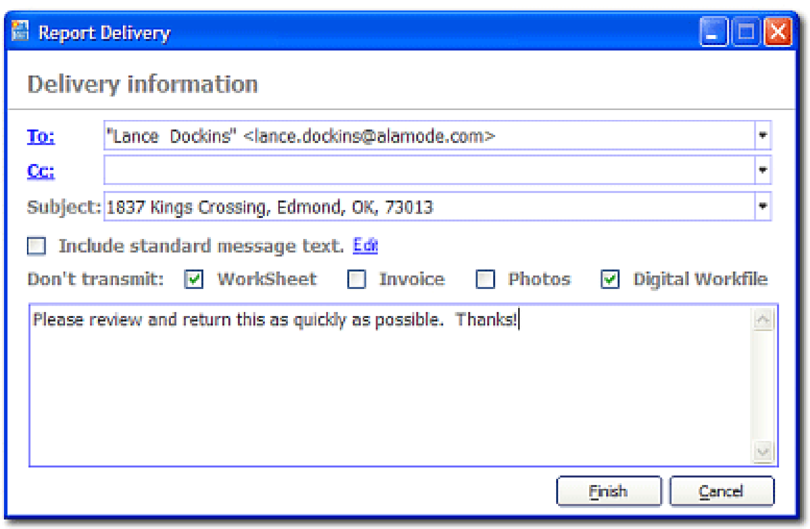
9. Your report is generated and attached to an outgoing e-mail message from your default e-mail client, whether

that's Microsoft Outlook, Outlook Express or any other MAPI-compliant e-mail tool. Click **Send** and you're done.

Deliver WinTOTAL Reports

As easy as it is to send a PDF report to your customers, it's just as easy to use your MAPI-compliant e-mail to send a copy of your WinTOTAL report to another appraiser for editing or review. To deliver a WinTOTAL report…

1. With your report open in WinTOTAL, choose **Deliver Report**, **WinTOTAL Report Using Outlook or Regular E-mail** from the menus. Or, if you've configured this as your default delivery method, just click the **Send** button in the toolbar.
2. Complete the necessary fields in the **Delivery Information** screen.

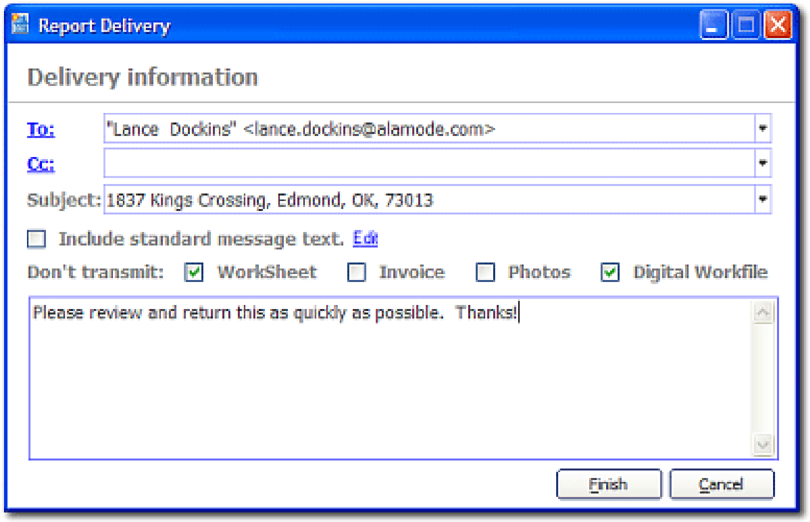


3. When sending a WinTOTAL report, can exclude some information that may not be appropriate to share with another appraiser, such as your **WorkSheet** or **Invoice**, from the report you send. Removing other features, like **Photos** or the **Digital Workfile** can reduce the size of the file you're going to send. Just check the boxes for any items which you wish to exclude from the report.
4. Click **Finish** to attach your report to an outgoing e-mail message from your default e-mail client - whether that's Microsoft Outlook, Outlook Express or any other MAPI-compliant e-mail tool. Then, just click **Send** to deliver the message.

Deliver Reports to Athena Users

As easy as it is to send a PDF report to your customers, it's just as easy to use your MAPI-compliant e-mail to send a copy of your WinTOTAL report to another appraiser who uses the Athena version of WinTOTAL for editing or review. To deliver a WinTOTAL report to an Athena user…

1. With your report open in WinTOTAL, choose **Deliver Report**, **WinTOTAL Athena Report Using Outlook or Regular E-mail** from the menus. Or, if you've configured this as your default delivery method, just click the **Send** button in the toolbar.
2. Complete the necessary fields in the **Delivery Information** screen.



3. When sending a WinTOTAL report, you an additional option to exclude some information that may not be appropriate to share with another appraiser, such as your **WorkSheet** or **Invoice**, from the report you send. Removing other features, like **Photos** or the **Digital Workfile** can reduce the size of the file you're going to send. Just check the boxes for any items which you wish to exclude from the report.

4. Click **Finish** to attach your report to an outgoing e-mail message from your default e-mail client - whether that's Microsoft Outlook, Outlook Express or any other MAPI-compliant e-mail tool. Then, just click **Send** to deliver the message.

Review Sent Reports

In past versions of WinTOTAL, you could view the reports you sent to customers in the EDI Center. In Aurora, the reports you send, like other e-mails, are saved in the **Sent Items** folder of your e-mail client (or whatever your e-mail software calls that folder). For example, to view the reports you sent through Microsoft Outlook…

1. Click the **Sent Items** folder in your list of folders on the left side of your Outlook window. Or from the menu choose **Go**, **Folder**, click **Sent Items**, and then click **OK**.

2. The reports you sent are saved in this folder. You can use any of Outlook's advanced features to sort or find a particular report.

3. Once you've found the report you want, you can resend it by opening the item, then choosing **Actions**, **Resend This Message** from the menus. Consult the documentation for your e-mail software for specific steps to accomplish these tasks.

Receive WinTOTAL Reports

In the past, chances are when you received a report from a colleague, you opened it with the old "EDI Center" in WinTOTAL Athena. Since Aurora no longer needs the EDI Center, you can now receive your reports directly through your default e-mail client. Launching the file attachment from there opens that report with WinTOTAL, just as you'd expect.

1. When someone sends you a WinTOTAL file, it now appears in your e-mail application like any other e-mail.

2. Open the e-mail message, click (or double-click, depending upon your e-mail application) the attachment, and choose **Open**.

3. If this is a file for a new report — rather than a file that you originally created and that has been returned — a screen appears allowing you to select which WinTOTAL folder you'd like to store the report in. Select the folder from the list and click **OK**.

4. If this is a copy of an existing report, the **Update WinTOTAL Report** screen opens, showing details of the report you just received, as well as any existing reports in your WinTOTAL files list that match the new one. At this point, you can:

   - Select the desired report in the lower list and click **Replace** to overwrite the file on your system with the new file you received.
   - Click **New** to save the incoming file as a new report. You're then prompted for which folder you'd like the new report saved in. Choose an existing folder from the list and click **OK**.
   - Click **Cancel** to close the screen and perform no action.

Hint: If you'd like the report to open automatically in WinTOTAL after either replacing another report or starting a new one, make sure the **Open Report** box is selected.

Your report is saved on your system and, if you choose, opened in WinTOTAL, ready for you to edit, review or deliver.

SureReceipts

While many appraisals today are delivered through e-mail, that's not always the most efficient and secure method. Instead, we've developed a technology called "SureReceipts" that combines the communication power of e-mail with the intelligence and programmability of the Internet.

Instead of sending an e-mail with your report attached, SureReceipts sends an e-mail to your client with a link to the report stored on the XSites Network for 30 days. When they click the link to download the report, you're immediately notified, so you know the report made it to your client. As an added advantage, the report remains on the XSites Network for a while, in case your client loses the original report. Since the report remains on the XSites Network for 30 days, your client can simply access the same link again to re-download the report later.

Deliver Reports with SureReceipts

To deliver a report through SureReceipts…

1. With your report open in WinTOTAL, choose **Deliver Report**, **Using WinTOTAL SureReceipts** from the menus. Or, if you've configured this as your default delivery method, just click **Send** in the toolbar.

2. The **SureReceipts Overview** screen appears explaining the advantages of this deliver method. If you'd prefer not to see this screen in the future, check the box to the lower left and click **Next**.

3. Complete the necessary fields in the **Delivery Information** screen. To save time, you can automatically fill in most of these items based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.

4. For the address fields, you can choose a recipient from your WinTOTAL Contacts Database to speed up this process. Click the **To** or **CC** link to open the **Select Recipients** screen. Double-click the appropriate contact to add that person to your **Message Recipients** screen, and then click **OK**.

5. You can also insert text directly into the message that your customer sees when they retrieve a report. To do so, check the **Include standard message text** box.

Note: For more information about setting up your Standard Message Text, see the respective section of this user guide.

6. There are two remaining options that add automated text to your message. Check either **Acrobat download instructions** or **XSite Order Manager Information** to automatically insert the respective instructions that explain these useful tools to your customer.

7. If you use WinTOTAL's digital workfile feature, you can have a copy of the PDF file automatically added to it. This ensures that you always have an exact copy of the report you send to your customers. Check the **Save PDF to report's Workfile** box to enable this feature.

8. Click **Finish** and select the forms you'd like to include in your report from the screen that appears.

9. Set any other options as necessary and then click **OK**.

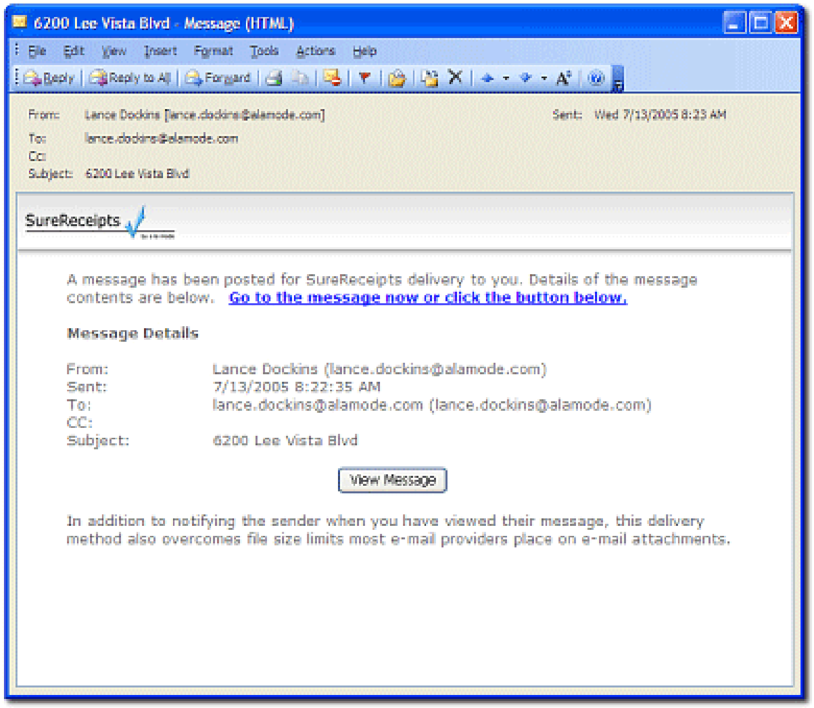
Your report is generated and uploaded to the SureReceipts server. Immediately, your customer receives an e-mail containing a link to the report. When your customer receives the message and clicks the link to retrieve the report, you are sent an e-mail notifying you of the event.

Hint: When your customers download a report, it doesn't go away. Instead, the report remains on the SureReceipts server for 30 days. If your customers need to re-access the report during that time, they can simply click the e-mail link again. Each time the report is accessed, you are notified.

Receive Reports from SureReceipts

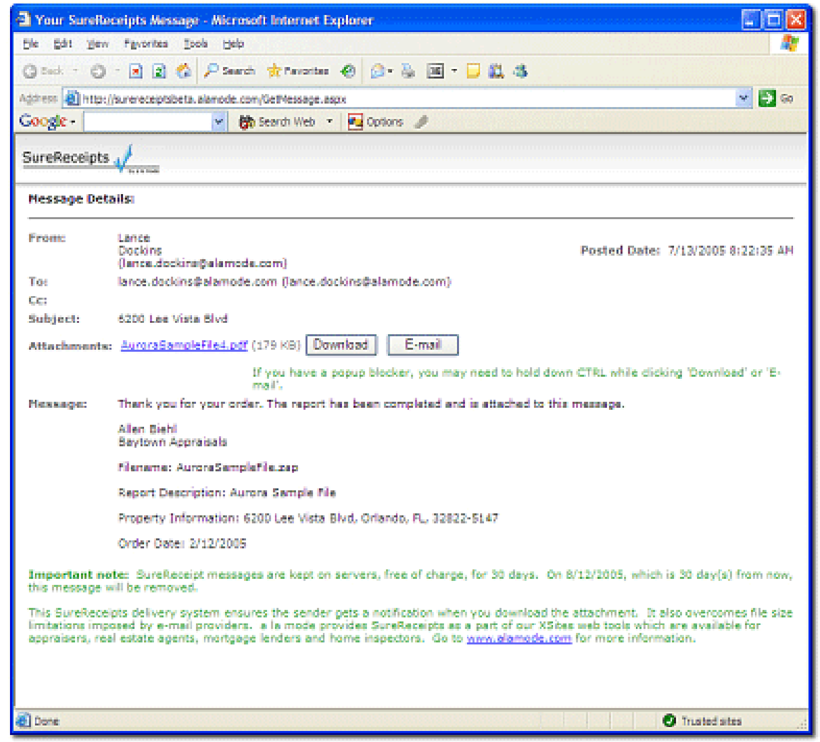
Since you may want to know what your customer receives when you send them an order through SureReceipts, here are the steps that a vast majority of users experience. Keep in mind that every company is somewhat different in how they handle e-mail.

1. The customers receive the custom e-mail you created and open it in their default e-mail client.



2. After reading the message, the recipients can click either the **Go to the message** link, or the **View Message** button. Both are included to ensure that even those users who cannot view graphics — like the button — in their e-mail can still retrieve your report.

3. The SureReceipts web site opens and your order details are displayed for your customers.



4. When customers click the button in the screen that appears, the file opens in the **SureReceipts Download** screen. From here, customers can print or save the file to their local hard drive.

5. As soon as your customers click the **View Message** button in their e-mail, you receive an e-mail notifying you that the report has been accessed.

XSite Delivery

To deliver a report to a customer through your XSite…

1. Open you report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.

   Note: You can also access this plugin by choosing **Deliver Report, Using any XSite Order Manager Plugin** and choosing **XSite Delivery** in the list presented.

2. From the list of plugins, select **XSite Delivery** and click **Next**.
3. The **Aurora Print Engine** appears, allowing you to select which forms in your report you want to include in the final document. Select the forms you want to include, set any other options necessary, and click **OK**.
4. The **XSites Delivery Wizard** appears to guide you through the delivery process. Click **Next** to launch the process.
5. Every time you run the wizard, the first task it performs is to check for the latest plugin updates. This takes only a moment and ensures that you're using the latest improvements to the process. Once the updates are loaded, click **Next**.
6. The next step in the wizard presents you with the results of an Errors and Omissions review of your report. Confirm that the report is acceptable.
   - Click **E&O Details** to get more information about the errors that may have been found.
   - Click **View PDF** to check the PDF file you created.
   - If you do find a problem that needs to be corrected, click **Cancel** to leave the wizard and return to WinTOTAL. Modify the report as needed and then start the process over at Step 1.
7. Click **Next** to continue**.**
8. The next screen gives you the option of creating a customized e-mail message for your client. If you choose not to use one, then the wizard generates a generic message on your behalf. Most clients appreciate a personal touch, so check the **Custom e-mail** box. Then, if you want to attach an electronic copy of the report to your message, mark the **Attach PDF to message** box as well and click **Next** to continue.
9. If you chose to create a custom e-mail message, the next step allows you to create the message. Complete the necessary fields with your client's information. You can automatically fill in most of this information based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.
10. You can also insert text directly into the e-mail message that is sent using information from your report. Check the **Include standard message text** box, then click **Edit standard message text**.
11. Type the standard message you'd like to include in the e-mail message that accompanies the link to your report. Then, from the list, check any of the report items you want to insert into the message. Finally, type your "signature block" in the final text box and click **Save**. Now, each time you send a report, this standard text is automatically inserted into the message. Of course, on each report, you can easily edit the default text.
12. Click **Finish** to complete the report and deliver the message to your client.

ACS Delivery

Before you can use WinTOTAL to work with ACS, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have a Vendor ID and an ACS order. Please see your ACS trainer if you are not already set up.

If you need to sign up to work with ACS, visit their website at https://www.valuationsupportservices.com/

Delivering reports to ACS is a simple two step process:

- Start the delivery process and print your report.
- Complete the ACS Delivery Wizard.

ACS Overview

Once you've set everything up, you're ready to process your first order. Once you have an order, the process goes like this...

1. Download and acknowledge the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the ACS delivery plugin

Receiving Orders from ACS

Ultimately, you will work out how you receive orders from ACS through your ACS trainer. Typically, you either receive the order as an e-mail attachment or by downloading it from the ACS site. For exact instructions on downloading your report from the ACS site, consult your ACS trainer. Once you have the .ORD order file (whether as an e-mail attachment or file download), you can import it into WinTOTAL by simply double-clicking it.

Acknowledge ACS Orders

To review and acknowledge an order from ACS…

1. If you have not already done so, double-click the .ORD file that ACS sent to you to add the order to your Files PowerView in the Appraisal Desktop.
2. Open the Appraisal Desktop and find the new appraisal order.
3. When you find the order, click it and then click the **Order Form** tab at the bottom of the screen to view the order.
4. When the split screen appears, click **View Client Order** in the middle toolbar to see the original ACS order appear on screen.
5. After reviewing the order, return the **Order Form** split screen view and click **Acknowledge** to send your response to ACS.

Start ACS Delivery

To start the ACS delivery process...

1. With your report open in WinTOTAL, click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **ACS Delivery** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send. If you need assistance in using the **Print** screen, consult the Printing chapter of this user guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

   Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the ACS Delivery Wizard to send your report to ACS.

Complete ACS Delivery

Once you've started the ACS delivery process for your formfilling software, the ACS Wizard opens.

1. Once you've read the ACS Delivery Introduction, click **Next**.
2. The wizard first verifies the order number and your appraiser ID. Review this information and click **Next**.
3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that ACS has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
5. If your report contains any "critical" errors, you must address them before you can deliver your report to ACS. WinTOTAL provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the ACS delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from ACS. If they agree, they will send you an override code so you can proceed through the report. Once you receive

the override code, just start the ACS delivery process again and enter it when you arrive at the critical errors step again.

  - **Enter Review Override Code** - If you received an override code from ACS, choose this option to enter the code and deliver your report.

6. Once you address all critical errors or override ACS' review rules, click **Finish** and stand by as WinTOTAL delivers your report directly to ACS.

CoreLogic Delivery

Before you can use WinTOTAL to work with CoreLogic Appraisal Services, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have a Vendor ID and an CoreLogic order. Please see your CoreLogic trainer if you are not already set up.

Delivering reports to CoreLogic is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the CoreLogic Delivery Wizard.

CoreLogic Overview

Once you've set everything up, you're ready to process your first order. Once you have an order, the process goes like this...

1. Download and acknowledge the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the CoreLogic delivery plugin

Receiving Orders from CoreLogic

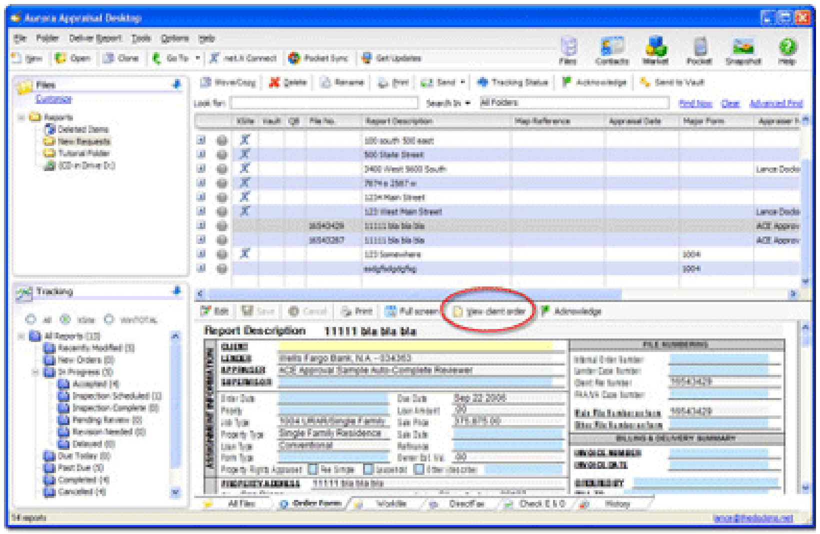
Ultimately, you will work out how you receive orders from CoreLogic through your CoreLogic trainer. Typically, you either receive the order as an e-mail attachment or by downloading it from the CoreLogic site. For exact instructions on downloading your report from the CoreLogic site, consult your CoreLogic trainer. Once you have the .ORD order file (whether as an e-mail attachment or file download), you can import it into WinTOTAL by simply double-clicking it.

Acknowledge CoreLogic Orders

To review and acknowledge an order from CoreLogic…

1. If you have not already done so, double-click the .ORD file that CoreLogic sent to you to add the order to your Files PowerView in the Appraisal Desktop.
2. Open the Appraisal Desktop and find the new appraisal order.
3. When you find the order, click it and then click the **Order Form** tab at the bottom of the screen to view the order.

4. When the split screen appears, click **View Client Order** in the middle toolbar to see the original CoreLogic order appear on screen.



5. After reviewing the order, return the **Order Form** split screen view and click **Acknowledge** to send your response to CoreLogic.

Start CoreLogic Delivery

To start the CoreLogic delivery wizard...

1. Open your report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **CoreLogic Appraisal Services** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send. If you need assistance in using the **Print** screen, consult the Printing chapter of this user's guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the CoreLogic Delivery Wizard to send your report to CoreLogic.

Complete CoreLogic Delivery

Once you've started the CoreLogic delivery process for your formfilling software, the CoreLogic Wizard opens.

1. Once you've read the CoreLogic Delivery Introduction, click **Next**.
2. The wizard first verifies the order number and your appraiser ID. Review this information and click **Next**.
3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that CoreLogic has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.

- o Double-click an area to jump to that error on the major form.
- o For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.

5. If your report contains any "critical" errors, you must address them before you can deliver your report to CoreLogic. WinTOTAL provides three options you can use to address the errors.
    - o **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the CoreLogic delivery process again.
    - o **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from CoreLogic. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the CoreLogic delivery process again and enter it when you arrive at the critical errors step again.
    - o **Enter Review Override Code** - If you received an override code from CoreLogic, choose this option to enter the code and deliver your report.
6. Once you address all critical errors or override CoreLogic' review rules, click **Finish** and stand by as WinTOTAL delivers your report directly to CoreLogic.

Quantrix Delivery

Before you can use WinTOTAL to work with Quantrix, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have a Vendor ID and an Quantrix order. Please see your Quantrix trainer if you are not already set up.

If you need to sign up to work with Quantrix, visit their website at https://vvs.quantrixvaluation.com/

Delivering reports to Quantrix is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the Quantrix Delivery Wizard.

Quantrix Overview

Once you've set everything up, you're ready to process your first order. Once you have an order, the process goes like this...

1. Download and acknowledge the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the Quantrix delivery plugin

Receiving Orders from Quantrix

Ultimately, you will work out how you receive orders from Quantrix through your Quantrix trainer. Typically, you either receive the order as an e-mail attachment or by downloading it from the Quantrix site. For exact instructions on downloading your report from the Quantrix site, consult your Quantrix trainer. Once you have the .ORD order file (whether as an e-mail attachment or file download), you can import it into WinTOTAL by simply double-clicking it.

Acknowledge Quantrix Orders

To review and acknowledge an order from Quantrix…

1. If you have not already done so, double-click the .ORD file that Quantrix sent to you to add the order to your Files PowerView in the Appraisal Desktop.
2. Open the Appraisal Desktop and find the new appraisal order.
3. When you find the order, click it and then click the **Order Form** tab at the bottom of the screen to view the order.
4. When the split screen appears, click **View Client Order** in the middle toolbar to see the original Quantrix order appear on screen.
5. After reviewing the order, return the **Order Form** split screen view and click **Acknowledge** to send your response to Quantrix.

Start Quantrix Delivery

To start the Quantrix delivery process…

1. Open your report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **Quantrix** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send. If you need assistance in using the **Print** screen, consult the Printing chapter of this user guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the Quantrix Delivery Wizard to send your report to Quantrix.

Complete Quantrix Delivery

Once you've started the Quantrix delivery process for your formfilling software, the Quantrix Wizard opens.

1. Once you've read the Quantrix Delivery Introduction, click **Next**.
2. The wizard first verifies the order number and your appraiser ID. Review this information and click **Next**.

3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.

4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that Quantrix has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.

   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.

5. If your report contains any "critical" errors, you must address them before you can deliver your report to Quantrix. WinTOTAL provides three options you can use to address the errors.

   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the Quantrix delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from Quantrix. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the Quantrix delivery process again and enter it when you arrive at the critical errors step again.
   - **Enter Review Override Code** - If you received an override code from Quantrix, choose this option to enter the code and deliver your report.

6. Once you address all critical errors or override Quantrix' review rules, click **Finish** and stand by as WinTOTAL delivers your report directly to Quantrix.

Rels Delivery

Before you can use WinTOTAL to work with Rels Valuation / ValueIT you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have a Vendor ID and a Rels order. Please see your Rels trainer if you are not already set up.

If you needs to sign up to work with Rels, visit their website at http://www.evalueit.com/

Delivering reports to Rels is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the Rels Delivery Wizard.

Rels Overview

Once you've set everything up, you're ready to process your first order. Once you have an order, the process goes like this...

1. Download and acknowledge the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the Rels delivery plugin

Receiving Orders from Rels

Ultimately, you will work out how you receive orders from Rels through your Rels trainer. Typically, you either receive the order as an e-mail attachment or by downloading it from the Rels site. For exact instructions on downloading your report from the Rels site, consult your Rels trainer. Once you have the .ORD order file (whether as an e-mail attachment or file download), you can import it into WinTOTAL by simply double-clicking it.

Acknowledge Rels Orders

To review and acknowledge an order from Rels...

1. If you have not already done so, double-click the .ORD file that Rels sent to you to add the order to your Files PowerView in the Appraisal Desktop.
2. Open the Appraisal Desktop and find the new appraisal order.
3. When you find the order, click it and then click the **Order Form** tab at the bottom of the screen to view the order.
4. When the split screen appears, click **View Client Order** in the middle toolbar to see the original Rels order appear on screen.
5. After reviewing the order, return the **Order Form** split screen view and click **Acknowledge** to send your response to Rels.

Start Rels Delivery

To start the Rels delivery process...

1. Open your report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **RELS / Value IT** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send. If you need assistance in using the **Print** screen, consult the Printing chapter of this user guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the Rels Delivery Wizard to send your report to Rels.

Complete Rels Delivery

Once you've started the Rels delivery process for your formfilling software, the Rels Wizard opens.

1. Once you've read the Rels Delivery Introduction, click **Next**.

2. The wizard first verifies the order number and your appraiser ID. Review this information and click **Next**.

3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.

4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that Rels has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.

5. If your report contains any "critical" errors, you must address them before you can deliver your report to Rels. WinTOTAL provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the Rels delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from Rels. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the Rels delivery process again and enter it when you arrive at the critical errors step again.
   - **Enter Review Override Code** - If you received an override code from Rels, choose this option to enter the code and deliver your report.

6. Once you address all critical errors or override Rels' review rules, click **Finish** and stand by as WinTOTAL delivers your report directly to Rels.

ePC Delivery

Electronic Partner Connection (ePC) is a Fiserv portal that specializes in managing transactions for companies like mortgage lenders. They manage connections to settlement service providers and provide back-end tools so your clients can focus on their core lending business.

By connecting to the XSites Network, ePC can offer all of their clients more automation for appraisal ordering, status and delivery. Even though you are communicating with them through the XSites Network, we have a tie-in to ePC so that your status and completed orders are automatically forwarded to their servers.

In a nutshell, we at a la mode are doing what we do best – communicate with appraisers – while ePC communicates electronically with your clients. If you need to sign up to work with ePC, visit their website at http://www.fiservlendingsolutions.com/content/affliateApplication.aspx.

Delivering reports to ePC is a simple two step process:

- Begin the delivery process and print your report.
- Complete the ePC Delivery Wizard.

ePC Overview

Once you have a ePC order, the process goes like this:

1. Download the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the WinTOTAL Plugin

Since ePC orders are not placed directly through your XSite, they are not automatically acknowledged by the system. Even if you verbally acknowledge an order, you still need to perform this operation through WinTOTAL. Orders which have not been acknowledged within 24 hours are subject to being reassigned to another appraiser in ePC's network.

Starting ePC Delivery

The process for sending reports to ePC from WinTOTAL is simple...

1. Open you report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **Electronic Partner Connection** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send to ePC. If you need assistance in using the **Print** screen, see the Printing chapter of this user guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

   Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the ePC Delivery Wizard to send your report to ePC.

Complete ACS Delivery

Once you've started the ePC delivery process for your formfilling software, the ePC Wizard opens.

1. Read ePC Delivery Wizard introduction and click **Next**.
2. Verify the order details shown by the Wizard. Then, click **Next** to continue.
3. Next, complete the invoice and click **OK**. Be sure to do this even if you have an invoice in your report as ePC uses a special invoice system that's able to interface with the invoice in your PDF.
4. The plugin next checks for updates to ePC's Errors and Omissions script. This is automatic and ensures the latest business rules are being followed so your report passes underwriting. Click **Next.**
5. You'll then see the **Delivery Guidelines Checklist**. This is just a short list of things to verify. For your convenience, click the **View PDF** button peak at the report so you can see what you're sending. Once you've verified everything, click **Next**.

6. Before delivering the report, XSOM runs a quick E&O check using rules that ePC has hand selected. Once the check is complete, XSOM shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
7. If your report contains any "critical" errors, you must address them before you can deliver your report to ePC. XSOM provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the ePC delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from ePC. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the ePC delivery process again and enter it when you arrive at the critical errors step again.
   - **Enter Review Override Code** - If you received an override code from ePC, choose this option to enter the code and deliver your report.
8. After your report passes the E&O review, you may see a screen requesting additional information. This is at the discretion of the lender that ordered the appraisal. If prompted, click **Additional form data** and complete the extra questions. If you'd like to keep a copy of this data, click the **Print** button.
9. Finally, enter your e-mail address in the field and click **Finish** to deliver your report to ePC.

AppraisalPort Delivery

The AppraisalPort and FNC/OADI plugins for the WinTOTAL are designed expressly for use with WinTOTAL as a "source" and not for the other appraisal applications listed in WinTOTAL. For assistance with FNC's OADI Uploader, consult the documentation supplied with that software or contact FNC directly at 888-963-3330.

Since WinTOTAL incorporates the interface for the WinTOTAL report source plugin, it is very easy to send a file to work with the AI Ready format via our plugin. For data security purposes, only WinTOTAL reports created using the same customer number as the system running WinTOTAL may be used as source file for our WinTOTAL plugin. If you work with sub-contracted appraisers, start the jobs on your system, deliver them to the contractor using WinTOTAL's delivery functions, and then have the appraiser deliver the completed report back to you.

If you need to sign up with work with AppraisalPort, visit their website at http://www.appraisalport.com/

Receiving AppraisalPort Orders

To import orders into WinTOTAL from AppraisalPort's website...

1. When viewing an order on the AppraisalPort.com website, click **Detailed Info** and then click **Setup AI Ready Report**.
2. You'll then see an Internet Explorer **File Download** screen with buttons for **Open**, **Save**, **Cancel** and **More Info**. Click **Open**.
3. WinTOTAL converts the order to a .ORD file and opens it in your order manager.

Note: The only integration available with the AppraisalPort website is the ability to download orders. Our synchronization and status functions are not available for these types of orders since their site does not accommodate this functionality.

AppraisalPort Form Limits

Since the AppraisalPort delivery process requires a 3rd party delivery tool, FNC's OADI Viewer, there are limitations on the number of forms you can send to your clients through AppraisalPort. The list below summarizes the number of each form you can include in any report you transmit through AppraisalPort.

- 20 Text Addendums
- 6 Subject Photos (Front, Rear, Street and 3 additional)
- 12 Comparable photos
- 9 Listing photos
- 36 Additional photos (old limit was 24 additional photos)
- 2 Location Maps
- 2 Plat Maps
- 2 Floor plans
- 50 Extra Maps (old limit was 10 additional maps)

Start AppraisalPort Delivery

To start the AppraisalPort delivery process...

1. With your report open in WinTOTAL, click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **AppraisalPort** and click **Finish** in the screen that appears.
3. In the standard WinTOTAL **Print** screen, mark the pages you wish to send. If you need assistance in using the **Print** screen, consult the Printing chapter of this user guide. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

   Note: It is not necessary to print an invoice from WinTOTAL as a separate one is generated by the plugin.

4. Once the PDF and report conversion is complete, follow through the AppraisalPort Delivery Wizard to send your report to AppraisalPort.

Complete AppraisalPort Delivery

Once you've started the AppraisalPort delivery process for your formfilling software, the AppraisalPort Wizard opens.

The AppraisalPort Delivery Wizard

1. Once you've read the AppraisalPort Delivery Introduction, click **Next**.
2. The wizard first verifies the order number and your appraiser ID. Review this information and click **Next**.
3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that AppraisalPort has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
5. If your report contains any "critical" errors, you must address them before you can deliver your report to AppraisalPort. WinTOTAL provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the AppraisalPort delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from AppraisalPort. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the AppraisalPort delivery process again and enter it when you arrive at the critical errors step again.
   - **Enter Review Override Code** - If you received an override code from AppraisalPort, choose this option to enter the code and deliver your report.
6. Once you address all critical errors or override AppraisalPort' review rules, click **Finish** and stand by as WinTOTAL delivers your report directly to AppraisalPort.

RealEC Delivery

RealEC is a third party delivery agent that translates the information from lending institutions into the appropriate format for you to use just as it does the reverse for you when you deliver your report. Here's what you need to have before getting started.

- A RealEC order, placed through the XSites Network. In order to get XSite compatible orders from RealEC, just log into your profile on RealEC and enter your XSites Network **Username**.

- A completed appraisal report ready to send to RealEC.

If you need to sign up to work with RealEC in order to do business with a specific lender, visit their website at http://www.realec.com/sp_register.asp.

Delivering reports to RealEC is a simple two step process:

- Start the delivery process and print your report.
- Complete the RealEC Delivery Wizard.

RealEC Overview

Once you have a RealEC order, the process goes like this:

1. Download the order
2. Export it to your forms software
3. Send status as you work on the report
4. Deliver the final product using the XSite Order Manager Plugin

Acknowledge RealEC Orders

To review and acknowledge an order from RealEC...

1. If you have not already done so, double-click the .ORD file that RealEC sent to you to add the order to your Files PowerView in the Appraisal Desktop.
2. Open the Appraisal Desktop and find the new appraisal order.
3. When you find the order, click it and then click the **Order Form** tab at the bottom of the screen to view the order.
4. When the split screen appears, click **View Client Order** in the middle toolbar to see the original RealEC order appear on screen.
5. After reviewing the order, return the **Order Form** split screen view and click **Acknowledge** to send your response to RealEC.

Start RealEC Delivery

When RealEC places direct orders with you, they simply e-mail you the order. And when it's time to deliver the report, all you need is your completed report and a PDF copy of that report. To deliver a report to RealEC from WinTOTAL...

1. With the report open in WinTOTAL, click **Deliver Report**, **Using any XSites Order Manager Plugin** from the menus.
2. In the **Report Delivery** window that appears, click **RealEC** and then click **Next** to launch the RealEC Wizard.
3. You're presented with the WinTOTAL **Print** screen. Mark the pages you wish to send to RealEC, and click **OK**.

Note: It is NOT necessary to print an invoice from WinTOTAL. The plugin automatically adds one for you during delivery.

Once WinTOTAL finished printing your PDF, it automatically launches the RealEC Delivery Wizard to carry you through the rest of the process. Just follow the steps in the Wizard to complete delivery.

Complete RealEC Delivery

Once you've started the RealEC delivery process for your formfilling software, the RealEC Wizard opens.

1. The first screen is an introduction and instructions for the RealEC Wizard. Once you've read this screen, click **Next**.
2. The RealEC plugin then checks for updates to its configuration. If updates are found, the wizard restarts. Otherwise, just click **Next**.
3. A screen appears requesting verification of the appraisal order data. Just verify the data and click **Next**.
4. You're then prompted to complete an invoice for the client. The invoice is done separately so that it can tie back into RealEC's system and subsequently invoice the client.

   Note: Even if there was already an invoice in your report, you must complete this one, too. Once you're finished with the invoice, click **OK**.

5. Next the plugin checks for E&O review script updates. Once again, this is automatic and always ensures the latest business rules are followed so that your report passes underwriting. Click **Next**.
6. You're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
7. Before delivering the report, WinTOTAL runs a quick E&O check using rules that RealEC has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
8. If your report contains any "critical" errors, you must address them before you can deliver your report to RealEC. WinTOTAL provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the RealEC delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from RealEC. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the RealEC delivery process again and enter it when you arrive at the critical errors step again.

- o **Enter Review Override Code** - If you received an override code from RealEC, choose this option to enter the code and deliver your report.

9. Once you address all critical errors or override RealEC review rules, just enter your e-mail address and click **Finish** and stand by as WinTOTAL delivers your report directly to RealEC.

GAC Delivery

Before you can use WinTOTAL to work with GAC, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have a GAC order.

When GAC places direct orders with you, they simply e-mail you the order. And when it's time to deliver the report, all you need is your completed report and a PDF copy of that report. If you need to sign up to work with GAC, visit their website at http://www.fiservlendingsolutions.com/content/affliateApplication.aspx.

Delivering reports to GAC is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the GAC Delivery Wizard.

Start GAC Delivery

To deliver reports to GAC from WinTOTAL...

1. With your report open in WinTOTAL, click **Deliver Report**, **Using any XSite Order Manager Plugin** from the menus.
2. From the **Report Delivery** screen, select **GAC/Fiserv Lending Solutions** and click **Next**.
3. In the WinTOTAL **Print** screen, mark the pages you wish to send to GAC. Once the appropriate pages have been selected, click **OK** to generate the PDF report.

Once the PDF is complete, WinTOTAL automatically launches the GAC Delivery Wizard.

Complete GAC Delivery

Once you've started the GAC delivery process for your formfilling software, the GAC Wizard opens.

1. In the first step, read the introduction and then click **Next**.
2. Enter your GAC **Username** and **Password**, along with the **Order Number** for the appraisal you are delivering in the appropriate fields and click **Next**.

Hint: Check the **Remember Username and Password** box to skip this step in the future.

3. If you're delivering an order to Bank of America, a few additional steps appear.
   - o You're prompted to authorize Fiserv to use your signature for this specific appraisal report as part of Bank of America's requirement that orders be delivered in AIReady format. Click **I Agree** to continue.

- In order for Fiserv to use your signature, you must upload it for this order. At a minimum, **Browse** out to your **Appraiser Signature** and click **Open** to append it to this delivery. If a **Supervisor Signature** is required for this order, do the same for the **Supervisor Signature**. If you plan to do additional Bank of America orders, check the boxes to **Reuse this signature** so that you do not need to repeat this step again.

4. If you're delivering to Chase, additional steps appear.
   - Chase requires that you answer a handful of questions about the appraisal. Click the **Chase Questions** button to review them.
   - Answer each question with **YES** or **NO**, click **OK**, and then click **Next** to submit your answers and continue through the plugin.
5. GAC requires that certain guidelines be met whenever you deliver a report to them. Since there's no way to verify this by scanning your PDF file for the information, you must manually verify each that each condition has been met. In the screen that appears, check each box to verify that you've met the requirement and click **Next** to continue.
6. The plugin checks for Errors & Omissions using rules hand-selected by GAC. If no errors are found, click **Next,** and then **Finish** to upload your report to GAC. If errors are found, click **Detailed View** to display the errors along with the report form.
   - Click an error listed and your cursor jumps to that section of the form.
   - Click **Exit** to close the detail window.
   - Review any errors you see and correct them as necessary.
   - If you need to make corrections, you will have to exit the delivery plugin, make your changes in your appraisal report and then launch the delivery wizard again.
   - If there are no errors that need to be addressed, click **Next** to continue.
7. After your report passes the E&O review, click **Finish** in the screen that appears to deliver it directly to GAC.

PCV Murcor Delivery

Before you can use WinTOTAL to work with PCV Murcor, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- A PCV Murcor order.

To sign up for work with PCV Murcor, visit their website at http://www.pcvmurcor.com/

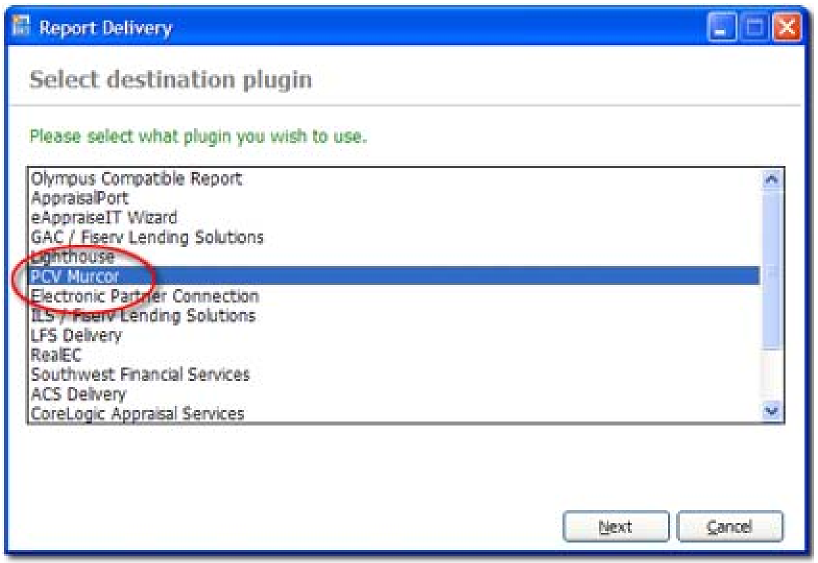
Delivering reports to PCV Murcor is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the PCV Murcor Delivery Wizard.

Start PCV Murcor Delivery

To send reports to PCV Murcor from WinTOTAL...

1. In your report in WinTOTAL, click **Deliver Report**, **Using any XSite Order Manager Plugin** from the menus.
2. From the **Report Delivery** screen, select **PCV Murcor** and click **Next**.



3. In the WinTOTAL **Print** screen, mark the pages you wish to send to PCV Murcor. Then, click **OK** to generate the PDF report.

After printing the PDF, WinTOTAL launches the PCV Murcor Wizard to help you finish delivering your report.

Complete PCV Murcor Delivery

Once you've started the PCV Murcor delivery process for your formfilling software, the PCV Murcor Wizard opens.

1. The PCV Murcor introduction appears. Read it and then, click **Next**.
2. Enter your PCV Murcor **Username** and **Password**, along with the **Order Number** for the appraisal you are delivering in the appropriate fields and click **Next**.

Hint: Check the **Remember Username and Password** box and your system will automatically complete this information for you each time you run the wizard. However, if you're sending a report from a computer other than your own, you won't want to do this.

3. PCV Murcor requires that certain guidelines be met whenever you deliver a report to them. Since there's no way to verify this by scanning your PDF file for the information, you must manually verify each that each condition has been met. Check each box to verify that each requirement has been met and then click **Next** to continue.
4. Before delivering the report, WinTOTAL runs a quick E&O check using rules that PCV Murcor has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.

- For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.

5. Review any errors you see and correct them as necessary. If you need to make corrections, you will have to exit the delivery plugin, make changes in your appraisal report and then launch the delivery wizard again. If there are no errors that need to be addressed, just click **Next** to continue.
6. Finally, click **Finish** to deliver it directly to PCV Murcor.

Southwest Financial Delivery

Before you can use WinTOTAL to work with Southwest Financial, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- A Southwest Financial order.

If you need to sign up to work with Southwest Financial, visit their website at http://www.sfsltd.com/

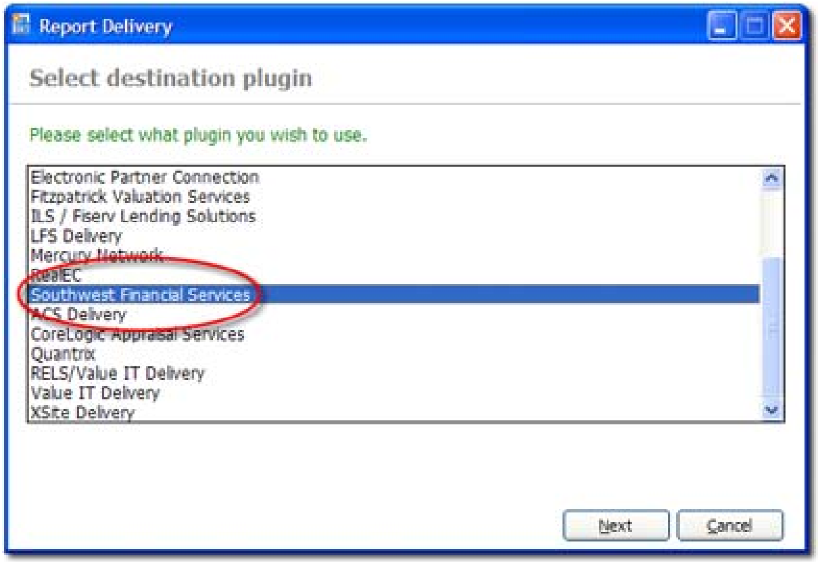
Delivering reports to Southwest Financial is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the Southwest Financial Delivery Wizard.

Start Southwest Financial Delivery

To send reports to Southwest Financial from WinTOTAL...

1. In your report in WinTOTAL, click **Deliver Report**, **Using any XSite Order Manager Plugin** from the menus.
2. From the **Report Delivery** screen, select **Southwest Financial Services** and click **Next**.



3. In the WinTOTAL **Print** screen, mark the pages you wish to send to Southwest Financial. Then, click **OK** to generate the PDF report.

After printing the PDF, WinTOTAL launches the WinTOTAL Southwest Financial Wizard to help you finish delivering your report.

Complete Southwest Financial Delivery

Once you've started the Southwest Financial delivery process for your formfilling software, the Southwest Financial Wizard opens.

1. The Southwest Financial introduction appears. Read it and then, click **Next**.
2. Southwest Financial requires that certain guidelines be met whenever you deliver a report to them. Since there's no way to verify this by scanning your PDF file for the information, you must manually verify each that each condition has been met. Check each box to verify that each requirement has been met and then click **Next** to continue.
3. Before delivering the report, WinTOTAL runs a quick E&O check using rules that Southwest Financial has hand selected. Once the check is complete, WinTOTAL shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
4. Review any errors you see and correct them as necessary. If you need to make corrections, you will have to exit the delivery plugin, make changes in your appraisal report and then launch the delivery wizard again. If there are no errors that need to be addressed, just click **Next** to continue.
5. Finally, click **Finish** to deliver it directly to Southwest Financial.

ILS Delivery

Before you can use WinTOTAL to work with ILS (a Fiserv company), you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have an ILS order.

Delivering reports to ILS is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the ILS Delivery Wizard.

Start ILS Delivery

To start the ILS delivery process from WinTOTAL...

1. In WinTOTAL, click **Deliver Report**, **Using any XSites Order Manager Plugin** from the menus.
2. From the **Report Delivery** screen, select **ILS Delivery** and click **Finish**.
3. In the WinTOTAL **Print** screen, mark the pages you wish to send. Then, click **OK** to generate the PDF report.

Note: It is NOT necessary to print an invoice from WinTOTAL. The plugin automatically adds one for you during delivery.

Once WinTOTAL finished printing your PDF, it automatically launches the ILS Delivery Wizard to carry you through the rest of the process. Just follow the steps in the Wizard to complete delivery.

Complete ILS Delivery

Once you've started the ILS delivery process for your formfilling software, the ILS Wizard opens.

1. Once you've read the ILS Delivery introduction, click **Next**.
2. The wizard requests your **Fiserv/ILS File ID**. Enter it into the box provided and click **Next**.
3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
4. Before delivering the report, XSOM runs a quick E&O check using rules that ILS has hand selected. Once the check is complete, XSOM shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
5. If your report contains any "critical" errors, you must address them before you can deliver your report to ILS. XSOM provides three options you can use to address the errors.
   - **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the ILS delivery process again.
   - **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from ILS. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the ILS delivery process again and enter it when you arrive at the critical errors step again.
   - **Enter Review Override Code** - If you received an override code from ILS, choose this option to enter the code and deliver your report.
6. Once you address all critical errors or override ILS' review rules, enter your e-mail address into the provided box and click **Finish** to deliver your report directly to ILS.

LFS Delivery

Before you can use WinTOTAL to work with LFS, you must complete a few steps. Here's what you need to have before getting started:

- WinTOTAL must be installed and configured.
- You must have an LFS order.

Delivering reports to LFS is a simple two step process:

1. Start the delivery process and print your report.
2. Complete the LFS Delivery Wizard.

Start LFS Delivery

To start the LFS delivery process from WinTOTAL...

1. In WinTOTAL, click **Deliver Report**, **Using any XSites Order Manager Plugin** from the menus.
2. From the **Report Delivery** screen, select **LFS Delivery** and click **Finish**.
3. In the WinTOTAL **Print** screen, mark the pages you wish to send. Then, click **OK** to generate the PDF report.

Note: It is NOT necessary to print an invoice from WinTOTAL. The plugin automatically adds one for you during delivery.

Once WinTOTAL finished printing your PDF, it automatically launches the LFS Delivery Wizard to carry you through the rest of the process. Just follow the steps in the Wizard to complete delivery.

Complete LFS Delivery

Once you've started the LFS delivery process for your formfilling software, the LFS Wizard opens.

1. Once you've read the LFS Delivery introduction, click **Next**.
2. The wizard requests your **LFS File ID**. Enter it into the box provided and click **Next**.
3. The Wizard connects to the Internet and confirms this information. If everything is in order, you're prompted to verify the contents of the PDF. Since there is no way to automatically know what is in a PDF, you must manually verify each item. Check the boxes to verify your report and when finished, click **Next**.
4. Before delivering the report, XSOM runs a quick E&O check using rules that LFS has hand selected. Once the check is complete, XSOM shows you the results to review and make adjustments. Just review the details and click **Next** when finished.
   - For a detailed view of the E&O details, click **Detailed View**.
   - Double-click an area to jump to that error on the major form.
   - For a hard copy of the details, click **Print**. The hard copy makes it easier to see what needs to be changed while you are changing items.
5. If your report contains any "critical" errors, you must address them before you can deliver your report to LFS. XSOM provides three options you can use to address the errors.

- **Cancel the Wizard and Make Changes** - Cancels delivery so you can update your report. Once you've addressed the errors, just start the LFS delivery process again.
- **Send a Review Report** - If you believe the "critical" error is inaccurate, click this option to request a delivery override code from LFS. If they agree, they will send you an override code so you can proceed through the report. Once you receive the override code, just start the LFS delivery process again and enter it when you arrive at the critical errors step again.
- **Enter Review Override Code** - If you received an override code from LFS, choose this option to enter the code and deliver your report.

6. Once you address all critical errors or override LFS' review rules, enter your e-mail address into the provided box and click **Finish** to deliver your report directly to LFS.

Lighthouse Delivery

The Lighthouse plugin for the Aurora generation of WinTOTAL was designed expressly for use with WinTOTAL as a means of converting your report to a format that can be sent via Lighthouse. It actually converts a WinTOTAL file back to our older Olympus format. This involves removing the file's encryption, renaming any report contents (such as digital photos) that had long file names back to a 16-bit "8 dot 3" convention for Lighthouse, converting images saved in the newer PNG format back to the JPG format, removing advanced formatting from supplemental addenda files and other internal conversions. Due to the number of conversions that are taking place in the plugin and Lighthouse, we recommend reviewing the Lighthouse file before delivering to your client.

For data security purposes, you can only deliver WinTOTAL reports created using the same customer number as the system converting the report through the Lighthouse plugin. If you work with sub-contracted appraisers and need to upload their files through Lighthouse, start the jobs on your system, deliver them to the contractor using WinTOTAL's Report Delivery functions, and then have the appraiser deliver the completed report back to you.

Note: Lighthouse is a third-party product that must be purchased and maintained separately from ACI/PDSI in order to send reports to clients requiring that system. For assistance the Lighthouse application, consult the documentation supplied with that software, or contact ACI/PDSI directly.

To use the Lighthouse delivery plugin…

1. Open you report in WinTOTAL and click **Deliver Report, Using any XSite Order Manager Plugin** from the menus.
2. Select **Lighthouse** and click **Finish** in the screen that appears.
3. The first screen is an introduction to the wizard. It gives you an overview of the steps. Click **Next** to continue.
4. Stand by as the report is converted to the Olympus format. When it's finished a screen notifying you that the conversion is complete appears. The converted file is stored in a subdirectory of your Lighthouse program

directory. By default the full path is:

C:\Program Files\Lighthouse32\Applications\Data\Mercury.

5. Click **Finish** to complete the process. The Lighthouse Plugin then starts the ACI/PDSI Lighthouse application.

Note: If you receive an error 76 while trying to start Lighthouse, you may not have Lighthouse properly installed on your system. In that case, verify your installation of Lighthouse (possibly with ACI/PDSI's support) and try the export again.

Once you are in the Lighthouse application, you may need to, among other things, review the converted report for accuracy and apply your ACI/PDSI digital signature before uploading to your client. Be sure to consult your Lighthouse documentation for additional help.