

a la mode help

Description

Create a Mercury Network profile
Document 5020
Revised 12/20/02 MPK

The big picture

An easy way to start getting orders electronically through Mercury is to create ready-made accounts for your lenders. Then, educate them on how to use the network to place appraisal orders.

Step by step

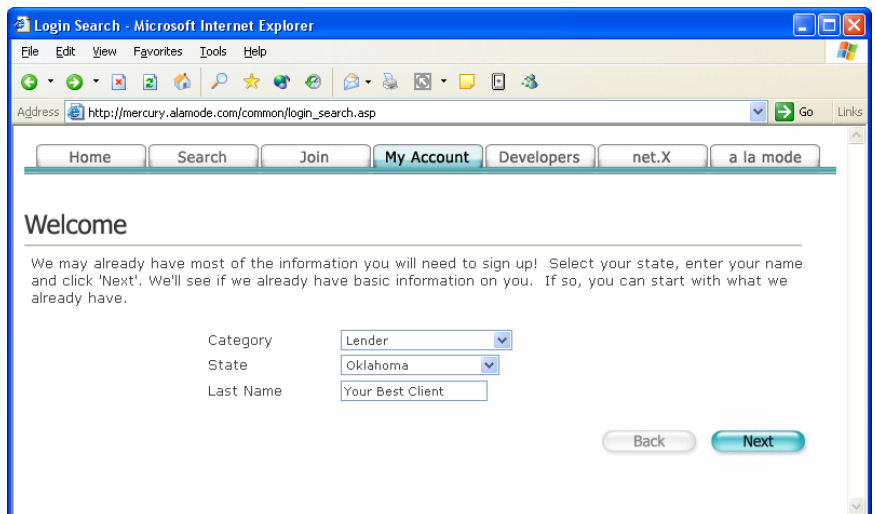
The process for creating a lender account is simpler than creating the account you use for your appraisal business. In a nutshell, this document will take you through:

- Logging out of your appraisal profile and creating a new lender profile
- Adding yourself to the lender's fee panel or preferred list.
- Placing a test order through the network
- Logging back into your account

Now, let's get started!

Create a new lender profile

1. Go to <http://www.alamode.com/mercury> and click **My Account**.
2. Basically, we'll want to get to the login screen. Mercury remembers this information, so when you go to the site, you'll probably see your account summary. If you do, just click Logout and then go back to the My Account tab. When you see the Login screen, you're where you need to be.
3. Click "I'm a new Mercury Network Member", and then click **Next**.
4. Part of the signup process is verifying you don't already have an account. Choose the appropriate category and state and enter the company name for the client whom you are creating the profile. Then, click Next.



5. Enter as much information as you can about your client. For the Loan Origination package, just use **Other** if you are not sure. They can always update this information later. Also, write down the username and password so that you don't forget it!

a la mode help

Account Creation - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://mercury.alamode.com/common/create.asp?LastName=Your%20Best%20Client&State=OK&MemberType=2> Go Links

Home Search Join My Account Developers net.X a la mode

My Profile

First Name	<input type="text" value="Lucy"/>	
Last Name	<input type="text" value="Lender"/>	
Title	<input type="text" value="Loan Origination"/>	
Company	<input type="text" value="Your Best Client"/>	
Address	<input type="text" value="123 Main"/>	This address should be your mailing address.
Address (cont'd)	<input type="text"/>	
City	<input type="text" value="Oklahoma City"/>	
State	<input type="text" value="Oklahoma"/>	
Zip/Postal Code	<input type="text" value="73012"/>	Your zip code must contain 5 or 9 digits.
Country	<input type="text" value="USA"/>	
Business Phone	<input type="text" value="405-555-7899"/>	Enter your main business phone number in this format: ###-###-####.
Fax Phone	<input type="text" value="405-555-9876"/>	
Email Address	<input type="text" value="lucy.lender@internet.net"/>	Enter the email address you will use to receive order confirmations.
Loan Origination Software	<input type="text" value="Other"/>	
Username	<input type="text" value="lucylender"/>	Enter a unique Username and password that you will use when logging into the Mercury network.
Password	<input type="password" value="*****"/>	Enter your password twice to verify that the correct password was entered.
Reenter Password	<input type="password" value="*****"/>	

Back Next

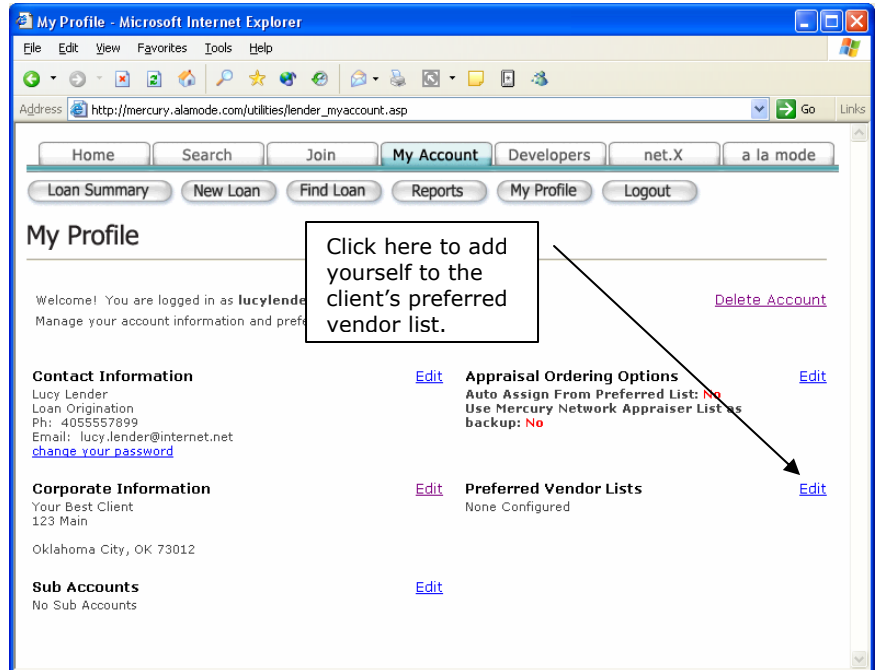
6. Click Next and scroll down to the bottom of the Account Creation agreement, and click I Agree. If you wish, you can print the agreement, by right clicking it and choosing Print before agreeing to it.
7. You'll then see the screen confirming the account creation. Click Next and you'll see the profile for the lender profile.

Adding yourself to the client's preferred list

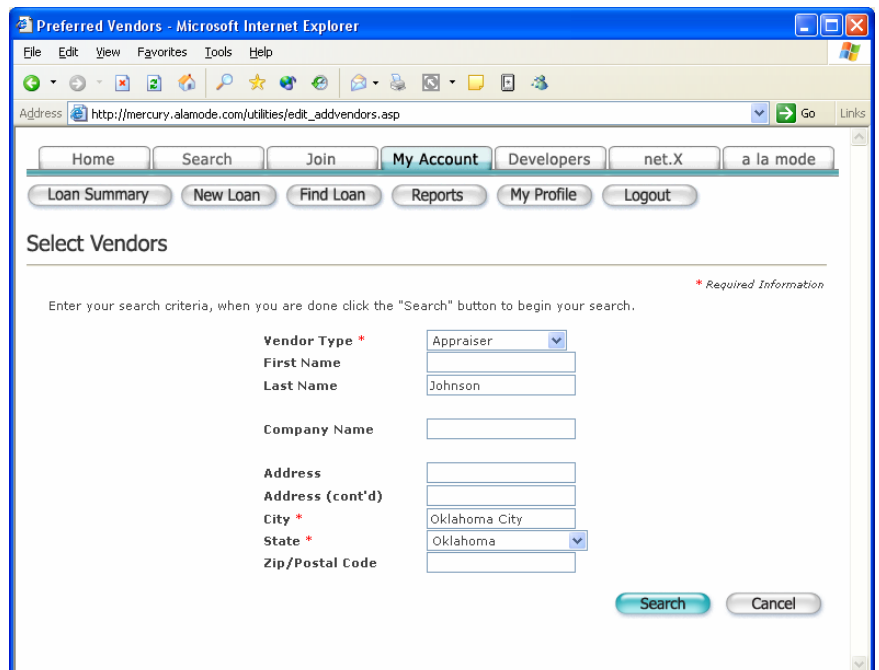
Now that you are at the main screen for the profile you've created, you'll want to add yourself to the client's preferred vendor list.

1. Click the **Edit** link to the right of the Preferred Vendor Lists label.

a la mode help



2. You'll see there are no preferred vendors. Click **Add**.
3. On the screen that appears, you'll need to search for yourself in the Mercury Network database. Enter your last name with city and state, and click Search.



4. You should see your name appear in the list. Click the "+" sign next to your name. Then, click **Done**.

That's it. You are the only appraiser in that lender's preferred list.

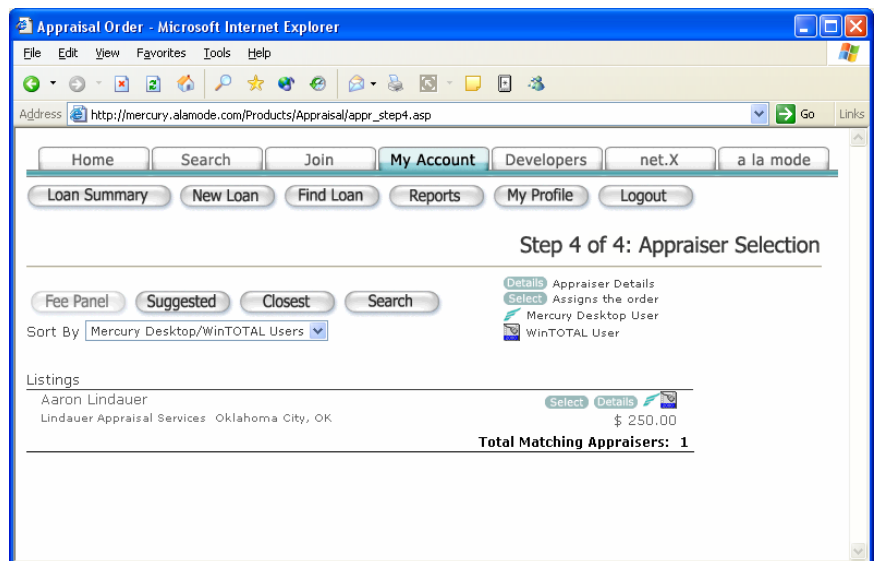
Placing a test order through the network

Now, you'll want to place a test order through the network just to verify everything is indeed configured the way you are expecting. You'll also want to do this to practice

a la mode help

for the time you are going to walk your client through this easy process.

1. While logged in with the lender's profile, click New Loan.
2. Enter in as much information as you wish. (The items with the red asterisk are required fields.) Then click Next.
3. Now, enter some sample borrower information, and click Next.
4. The next screen that appears is the loan summary. Near the bottom of the screen is an area for available products. Under Appraisal, click Place order.
5. Now, we've started a four step process. You can pretty much just enter in information and click next through the screens. Step 1 is entering information about the subject. Step 2 is information scheduling the appraisal. Step 3 is information about the type of job to be performed. Step 4 is where they choose the appraiser.



6. Naturally, your name will be the only one in the list. Click Select to choose the appraiser and send the order.

You'll then see the loan summary screen with the sample order you just entered. At that point, you can click the magnifying glass to see details about the loan and even have the option to delete it if desired.

Logging back into your account and accepting / uploading the order.

Now, we'll want to log out of the lender's profile and back into your own so that you can view the order and easily accept it. Likewise, you'll want to upload a sample PDF to show order completion when you demo to your client.

1. Click **Logout** while in the lender's profile. You'll be taken to the main Mercury screen,
2. Then, click **My Account** and log back in with your own profile
3. Immediately, you'll see your new request. You can click the magnifying glass icon next to it to see details.
4. Even though the e-mail sent to you regarding the order had a link to it, you can also accept it here from the Mercury network interface. Go ahead and click "I accept this order" and then click **Save**.

Now, we're going to upload a sample report in the PDF format. To do this, we need to

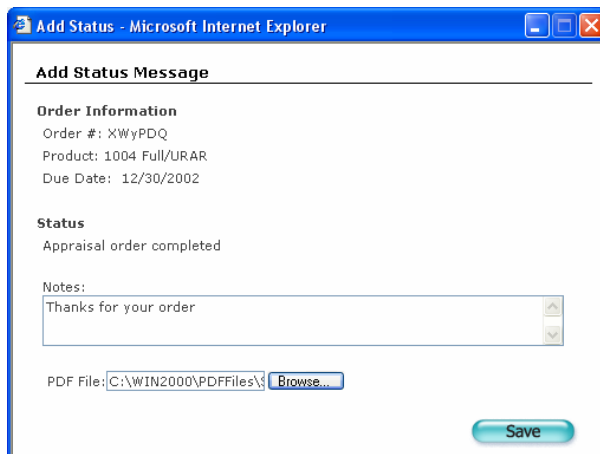
a la mode help

save the report as a PDF for use outside of e-mail or perhaps your usual EDI process. Here are the steps to create a PDF if you use WinTOTAL. For creating a PDF in other applications, consult the documentation supplied with your program.

1. After completing and signing the WinTOTAL report, click File and choose Print to PDF.
2. As usual with PDF creation, mark the pages you wish to print/send, and click OK.
3. You will be prompted with the name and location for the PDF. The default is C:\WIN2000\PDFFiles. Go ahead and accept the default.

Then, upload the PDF through the Mercury Network instead of e-mail...

1. Once again delivery through Mercury is different (and better) than regular e-mail. Here is how you send a PDF to your client through Mercury.
2. Go to the My Account area of the Mercury Network web site at <http://www.alamode.com/mercury>, and click Order Summary.
3. The active job should be listed in your **Orders in Progress** section. Click the magnifying glass image next to the job you want to upload.
4. Go down to the bottom of the screen to the Status History area, and click **Add Status**. A status dialog will appear.
5. Select the item from the drop-down for "Appraisal order completed", and click Add Status.
6. You'll then see a place for notes as well as a Browse button. Click Browse and select the PDF document created from your report. Once again, if you are using WinTOTAL, just navigate to the C:\WIN2000\PDFFiles directory and choose the file saved in that folder.



7. Then, type in any additional notes you wish to attach to the job, and click Save.

Stand by as the report is uploaded instantly to the Mercury Network servers and notification is sent to your client that an order is waiting for pickup. You'll be returned to the Order Summary screen, and from there, you can close out the window or perform other actions in your Mercury Account.

At this point, you can even log back in to lender profile you created and see the PDF symbol next to your report. Clicking the PDF symbol will open up the PDF of the appraisal you uploaded.

That's it! We hope this short tutorial was worthwhile and facilitates your EDI processes with Mercury.

a la mode help
