



**CMS User Manual**  
**Loan Officers/Brokers**

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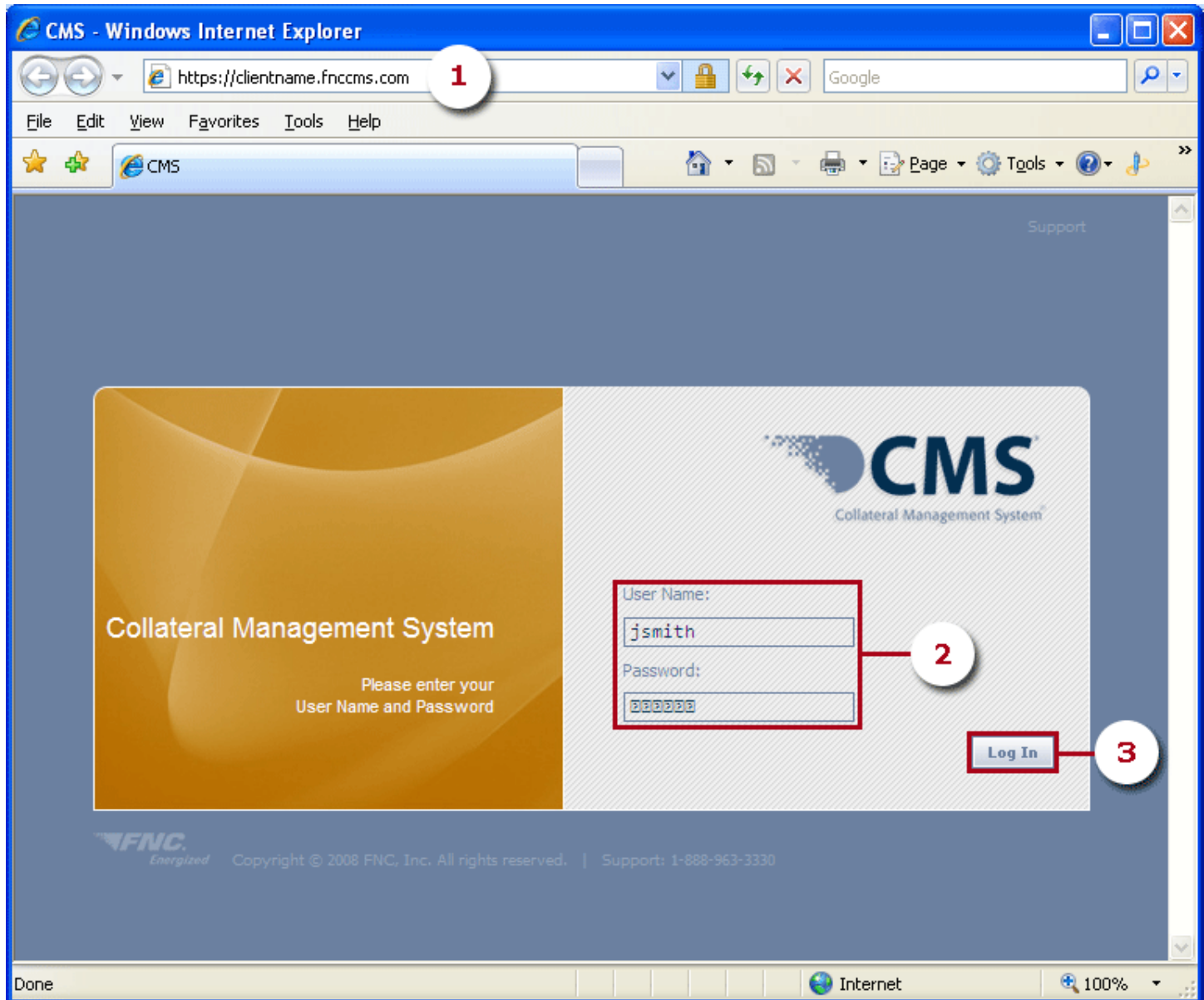
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# System Basics

## Logging In

Before logging in for the first time, you will receive an email from CMS containing your production URL (web address), User Name, and a temporary password.

1. Point your web browser to the following URL: <https://clientname.fnccms.com>.
2. Enter your assigned **User Name** and **Password**.
3. Click the **Log In** button.



## Change Temporary Password

When logging in for the first time, you will be prompted to select a permanent password:

1. Enter your temporary password in the **Old Password** field.
2. Select and enter your new password into the **New Password** and **Confirm New Password** fields.

**Note:** Your password must include all four of the following requirements:

- One or more lowercase characters
- One or more uppercase characters
- One or more special characters
- One or more numbers

3. Select and enter a **Secret Question** and **Secret Answer**.

4. Click **Save** when you are finished.

**Note:** The password you select will expire in 90 days.

The screenshot shows a web browser window titled "CMS - Windows Internet Explorer" with the address bar displaying "https://clientname.fnccms.com". The page content is titled "Change Password" and includes the following text: "This is your first time logging into the system, your password has been reset, or your password has expired. Please provide a new password and password question and answer." The form fields are as follows:

- User Name \*: jsmith
- Old Password \*: [Redacted] (Callout 1)
- New Password \*: [Redacted] (Callout 2)
- Confirm New Password \*: [Redacted] (Callout 2)
- New Secret Question \*: favorite color (Callout 3)
- New Secret Question Answer \*: red (Callout 3)
- Buttons: Save (Callout 4), Cancel

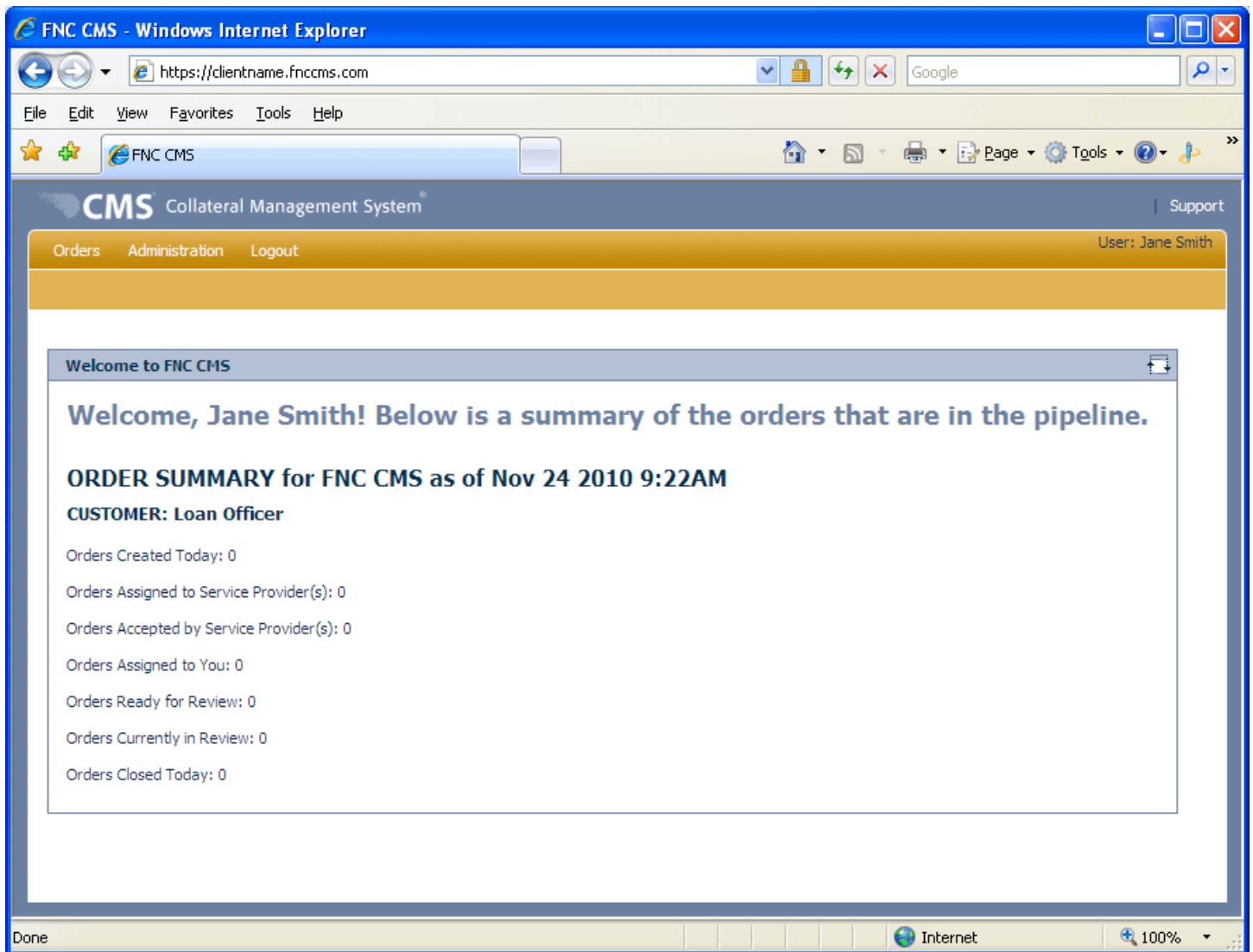
5. A message will pop-up indicating you have successfully changed your password. Click the **OK** button.



**Note:** After changing your password, you will be prompted to log in to CMS again using your new password.



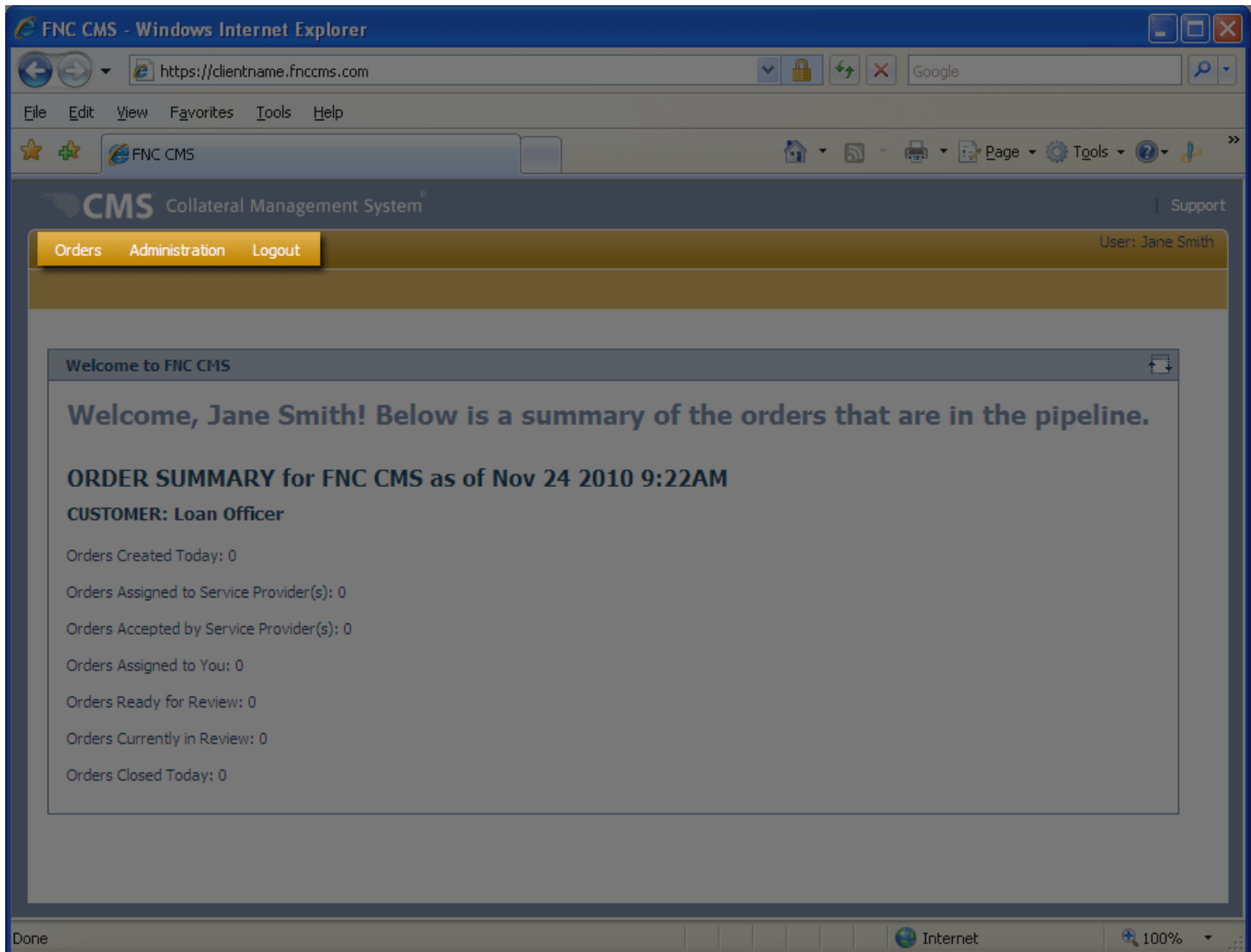
Upon logging in to CMS, a welcome screen will be displayed providing order summary information about orders that are currently in the CMS pipeline.



## CMS Menu Toolbar

The CMS Menu Toolbar provides access to all modules within CMS.

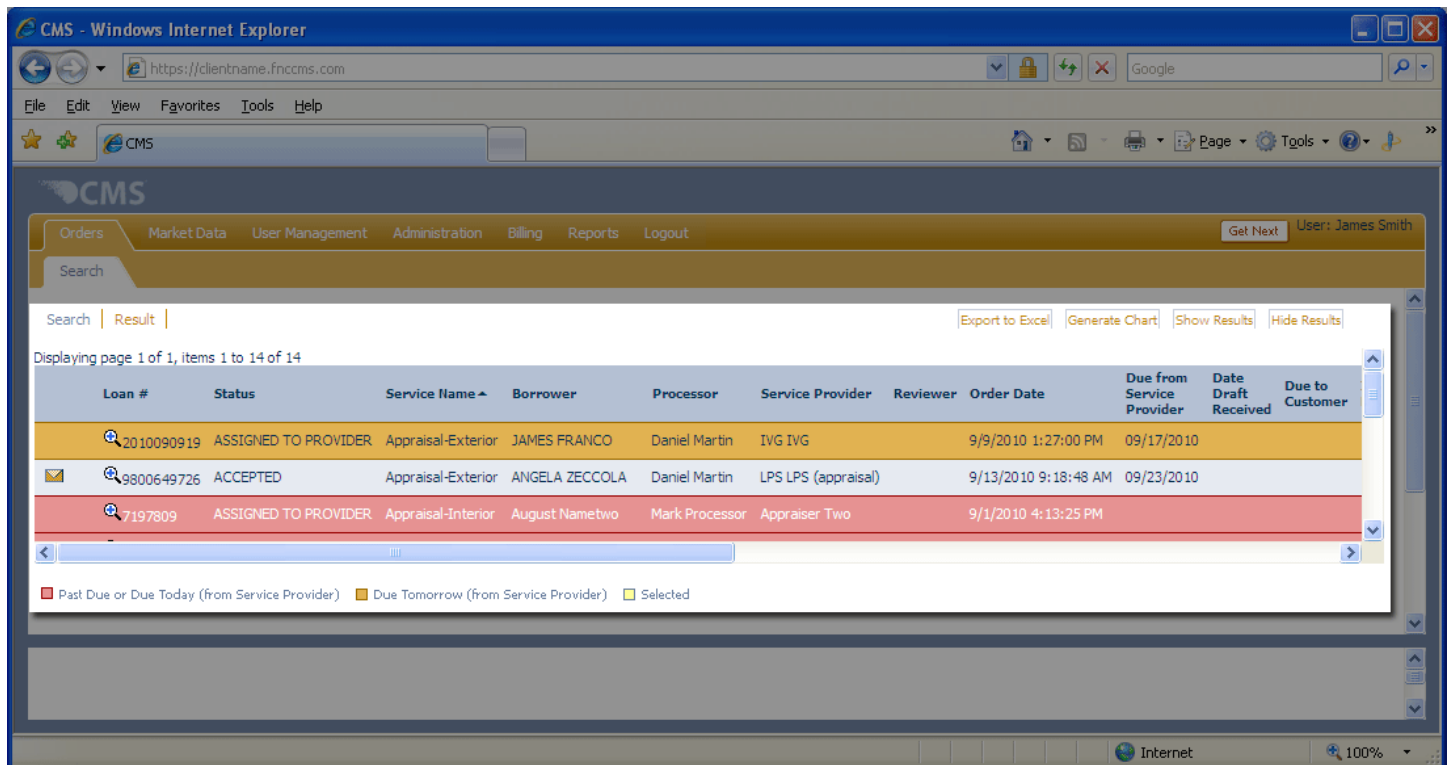
- **Orders** – provides access to the Search module.
- **Administration** – provides users the ability to change their password.
- **Logout** – allows a user to log out of their current CMS session.





## Search Results


The Search Results section of CMS will display all orders that match the search criteria selected. The Search Results lists each order individually and provides a great deal of information about each order. Use the scroll bar on the right side of the screen to move through the Search Results. Sort each column by clicking on the heading. Select an order by clicking on the magnifying glass in the far left column.



- The **number of orders** returned is displayed at the top left corner of the order list. If there are multiple pages, arrows will be available to move from page to page.
- Clicking **Export to Excel** will transfer the Search Results into an Excel spreadsheet format.
- **Generate Chart** provides the user the ability to view the Search Results in a bar, pie, or line chart based on order status.
- **Hide Results** will collapse the Search Results section. **Show Results** will expand the Search Results section (after it has been collapsed).
- An **envelope icon** to the left of an order indicates that the order has a new message for the user to read.
- A **flag icon** indicates a follow-up action item is open for the order.
- The different colors in the Search Results pertains to the product due date for the order.
  - **Pink**—product is past due or due the current day
  - **Orange**—product is due in one additional day from the current day
  - **White or Blue**—product is due two or more days from current day
- When an order is selected (by clicking the magnifying glass) the color of the order will change to **yellow**.

## Order Screen

Once an order has been searched for and selected, it will open in the CMS window. The order screen is divided into two different sections: **Order Summary** and **Workspace**.

 **Order Locked By:** Jane Smith 11/24/2010 10:04:03 AM Close Order

**Order Summary**

**Doc Status:** ASSIGNED TO PROVIDER

<b>Loan #:</b> 123456	<b>Doc ID:</b> 20101124-1242-1	<b>Folder #:</b> 20101124-1242
<b>Service:</b> 1004 - URAR		
<b>Address:</b> 1208 TULARE ST BAKERSFIELD, CA 93305		
<b>Borrower:</b> John Smith	<b>Appraised Value:</b>	
<b>Customer:</b> Test Customer	<b>Sales Price:</b> \$200,000.00	<b>Channel:</b> Retail
<b>Loan Officer/Broker:</b> Jane Smith	<b>Loan Amount:</b> \$0.00	<b>Sub Loan Type:</b>
<b>Due to Customer:</b>	<b>Due From Service Provider:</b> 11/24/2010	<b>Government Case Number:</b>
<b>Reviewer:</b>	<b>Inspection Date:</b>	

[Loan Information](#) | [Associated Files](#) | [Log and Message](#)

**Loan Information**

Loan Number	Borrower First Name *	Borrower Last Name *
<input type="text" value="123456"/>	<input type="text" value="John"/>	<input type="text" value="Smith"/>
Loan Purpose *	Loan Amount *	Sales Price
<input type="text" value="Purchase"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$200,000.00"/>
Owner Estimated Value	Additional Loan Number	
<input type="text" value="\$0.00"/>	<input type="text"/>	
Government Case Number	Sub Loan Type	
<input type="text"/>	<input type="text" value="--select one--"/>	
<input type="checkbox"/> High Value Property	<input type="checkbox"/> 1004 MC Required	
<input type="button" value="Save"/>		

## Order Summary

At the top of the order screen is the Order Summary section. It contains a summary of order details, always in view while working within an order.

**A.** General information about the order including property address and date information can be found within the Order Summary.

**B. Order Status** can be found at the top of the Order Summary in bold print.

**C.** Once the **Inspection Date** has been set, it will be available at the bottom of the second column of information.

**D.** Click the **Close Order** button to close the order screen.

The screenshot shows the 'Order Summary' section of a software interface. At the top, there is a header bar with a lock icon and the text 'Order Locked By: Jane Smith 11/24/2010 10:04:03 AM'. In the top right corner, there is a 'Close Order' button. The main content area is titled 'Order Summary' and contains two columns of information. Callout A points to the 'Address' field. Callout B points to the 'Doc Status: ASSIGNED TO PROVIDER' field. Callout C points to the 'Inspection Date: 29-Nov-2010' field. Callout D points to the 'Close Order' button.

Order Summary		
<b>Doc Status: ASSIGNED TO PROVIDER</b>		
<b>Loan #:</b> 123456	<b>Doc ID:</b> 20101124-1242-1	<b>Folder #:</b> 20101124-1242
<b>Service:</b> 1004 - URAR		
<b>Address:</b> 1208 TULARE ST BAKERSFIELD, CA 93305		
<b>Borrower:</b> John Smith	<b>Appraised Value:</b>	
<b>Customer:</b> Test Customer	<b>Sales Price:</b> \$200,000.00	
<b>Loan Officer/Broker:</b> Jane Smith	<b>Loan Amount:</b> \$0.00	<b>Channel:</b> Retail
<b>Due to Customer:</b>	<b>Due From Service Provider:</b> 11/24/2010	<b>Sub Loan Type:</b>
<b>Reviewer:</b>	<b>Inspection Date:</b> 29-Nov-2010	<b>Government Case Number:</b>

## Workspace

Directly under the Order Summary is the **Workspace**. The Workspace consists of three different working pages: Loan Information, Associated Files, and Log and Message. An explanation of each working page can be found within the **Working with Orders** section of this manual.

[Loan Information](#) | [Associated Files](#) | [Log and Message](#)

Loan Information

Loan Number

123456

Loan Purpose \*

Purchase

Owner Estimated Value

\$0.00

Government Case Number

☐ High Value Property

Save

Borrower First Name \*

John

Loan Amount \*

\$0.00

Additional Loan Number

Sub Loan Type

--select one--

☐ 1004 MC Required

Borrower Last Name \*

Smith

Sales Price

\$200,000.00

## Status Definitions

CMS is a status based system. The status of an order indicates at what point in the CMS process the order is currently in.

<b>Accepted</b>	The service provider has accepted the assignment. This will occur automatically when service providers accept the assignment on AppraisalPort or will need to be done manually for service providers who are not on AppraisalPort.
<b>Approved – As Is</b>	The received product has been reviewed and the reviewer decision of Acceptable has been selected. The product is approved and values are now available for viewing by the loan officer/broker.
<b>Approved – With Conditions</b>	The received product has been reviewed and the reviewer decision of Acceptable with Minor Defects has been selected. The product is approved and values are now available for viewing by the loan officer/broker.
<b>Assigned to Provider</b>	The order has been assigned to the service provider either automatically or manually, but not yet accepted (or rejected) by the service provider.
<b>Cancelled - By Request</b>	A processor should select this status if they receive notification to cancel the order.
<b>Cancelled – Duplicate Request</b>	After researching an Exception - Duplicate Order, place the order in this status to cancel when duplication is verified.
<b>Cancelled - General</b>	This is a catch-all status to use when cancelling an order if the reason for the cancellation does not fit into any of the other Cancelled statuses.
<b>Cancelled – Refund Due</b>	An order that has been paid for by the Customer when it was placed, and is cancelled before the product is completed by the service provider.
<b>Cancelled – With Fee</b>	An order that is cancelled, but the service provider is due a partial or full fee for work completed.
<b>Declined</b>	After the review of the appraisal is complete, the order is manually changed to this status if the reviewer determines that the loan should not be approved.
<b>Draft Not Acceptable</b>	The report has been sent by the service provider and received, but is deemed unacceptable because of missing, incomplete, or inaccurate information.
<b>Draft Received From Provider</b>	The report has been received from the service provider and is currently being reviewed by GAAR.
<b>Exception – Duplicate Order</b>	The order was found to be a duplicate of an open, existing order based on property address and/or loan number. An entry in the message log is made stating which order was a match to the current order.
<b>Exception-Incomplete</b>	The order was found to have incomplete information upon receipt. The missing information will either need to be manually entered, or the order can be cancelled by using the Cancelled – Incomplete Data status.

<b>Exception - Manual Assign</b>	Indicates the system was unable to automatically assign the order or an AppraisalPort user rejected the order. Before manually assigning an order, the user should read the Message Log to learn the history.
<b>Exception - Processor</b>	Access Instructions were entered by the loan officer/broker on the order form and must be reviewed by a processor and approved before the order can be assigned to a service provider.
<b>Exception - Reviewer</b>	The appraisal product has been received and the GAAR rules have run. The order is ready to be assigned to a reviewer.
<b>In Process</b>	An order is in this status after it has been entered using the Review module and the appraisal has been uploaded. The appraisal is currently being reviewed by GAAR.
<b>Incoming (New)</b>	An order is in this status when it is initially received and is waiting to be assigned to a service provider.
<b>On Hold</b>	The order has been manually placed on hold pending information to determine the next step needed for the order in the CMS process.
<b>Provider Accepts w/ Condition</b>	This status occurs automatically when a service provider on AppraisalPort accepts the order with a condition. The Message Log records the condition i.e. higher fee.
<b>Ready For Review</b>	The order has been assigned to a reviewer and is waiting to be reviewed.
<b>Rejected Online By Provider</b>	This status occurs automatically when the service provider rejects the service request on AppraisalPort.
<b>Rejected – No Provider Response</b>	This status occurs automatically when the service provider does not accept or reject the order within the set amount of time.
<b>Wholesale – Waiting for APSL</b>	The Wholesale order is waiting for the appraisal file to be uploaded to CMS.
<b>With Reviewer</b>	The order has been assigned to a reviewer and is currently under review.

## Create a New Order

The order form is used to create new orders in CMS. It is accessed under the Orders menu, then by selecting the New option.

The following appraisal services are available to order through the order form in CMS:

- 1004 – URAR
- 1004 with 1007
- 1004 with 216
- 1004 with 216 and 1007
- 1004C Manufactured Home
- 1004D – Update/Completion
- 1007 – Rent Schedule Comp.
- 1007 with 216
- 1025 – Small Residential Income
- 1025 with 216
- 1073 – Ind. Condo Unit
- 1073 with 1007
- 1073 with 216
- 1073 with 216 and 1007
- 1075 – Exterior Ind. Condo
- 1075 with 1007
- 1075 with 216
- 1075 with 216 and 1007
- 2000 – 1 Unit Field Review
- 2000A – 2 to 4 Unit Field Review
- 2006 – Short form Review
- 2055 Ext with 1007
- 2055 Ext with 216
- 2055 Ext with 216 and 1007
- 2055 Exterior Residential
- 2055 Interior
- 2070 – Cond and Mkt Report
- 2075 – Property Inspection
- 2090 – Co-Op Interest
- 2095 – Co-Op Ext Interest
- 216 – Operating Income Statement
- 442 – Satisfactory Certificate
- Automated Review
- BPO – Exterior
- BPO – Interior
- Compliance Inspection Report
- Desk Review
- Desktop Restricted Use Report
- Field Review
- Land Appraisal Report
- Photo Only
- Recertification of Value

## To Create a New Order Using the Order Form:

1. Click the **Orders** menu.
2. Select **New**.
3. The order form will open. **Begin filling out the form.**

**Note:** Required fields are marked by a red asterisk \*. Use the Tab key to move from field to field throughout the form.

CMS - Windows Internet Explorer

https://clientname.fnccms.com

File Edit View Favorites Tools Help

CMS

CMS Collateral Management System

Support

User: Jane Smith

Orders Administration Logout

New Review Bulk Search

Order Form

Customer/Loan Information

Date/Time Ordered 2/24/2011 11:06:15 AM

Date Due to Customer

Additional Loan Number

Customer Greensboro Credit Union

Loan Officer Christina Cafiero

Borrower Information

First Name \* MI Last Name \*

Phone Number \* Alternate Phone Number Borrower Email

☒ Can be contacted by service provider



## **Customer/Loan Information**

**Date/Time Ordered:** This field will auto-populate based on the **current date and time** the order form is opened.

**Rush Order:** If the order is a **Rush**, select this checkbox. Once selected, the Date Due From Service Provider field becomes available.

**Note:** Depending on how you are set up as a loan officer/broker, the Rush Order checkbox may not be available in the order form.

**Date Due From Service Provider:** This field is available when the Rush checkbox is selected. Use the **calendar icon** to select the rush due date for the service provider.

**Date Due to Customer:** This is an optional field and can be used to indicate when the customer would like to have the completed product. Use the **calendar icon** to select the appropriate date.

**Loan Number:** Enter the loan number for the order. This is a required field.

**Channel:** Use the **drop-down arrow to select a channel** for the appraisal request. Choose from **Correspondent, Foreclosure, Modifications, Other, Quality Assurance, Quality Control, REO, Retail, Servicing, or Wholesale**. This is a required field.

**Additional Loan Number:** If there is **another loan number associated** with the order, enter it here.

**Customer:** This field will auto-populate based on the **Customer organization** the loan officer/broker belongs to.

**Loan Officer:** This field will auto-populate with the **name of the loan officer/broker** creating the order.

Customer/Loan Information		
Date/Time Ordered 11/9/2010 2:06:31 PM	<input checked="" type="checkbox"/> Rush Order	Date Due From Service Provider 11/12/2010
Date Due to Customer 11/17/2010	Loan Number * 12121212	Channel * REO
Additional Loan Number 12345		
Customer Greensboro Credit Union		
Loan Officer Christina Cafiero		

## **Borrower Information and Access Contact Information**

**First Name**, **Last Name**, and **Phone Number** are all required in the **Borrower Information** section. Mark the **Can be contacted by service provider** checkbox to give the assigned service provider access to the borrower's contact information. If the checkbox is not selected, the service provider will not see any contact information.

The **Access Contact Information** section is optional. This section is used to provide contact information to the assigned service provider that they would need to gain access to the property for inspection. Enter any available information and mark the Can be contacted by service provider checkbox when appropriate.

Borrower Information		
First Name *	MI	Last Name *
<input type="text" value="James"/>	<input type="text"/>	<input type="text" value="King"/>
Phone Number *	Alternate Phone Number	Borrower Email
<input type="text" value="662-236-2020"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Can be contacted by service provider		
Access Contact Information		
Contact Name		
<input type="text" value="Kim Jones"/>		
Phone Number	Alternate Phone Number	Cell Phone
<input type="text" value="662-456-5454"/>	<input type="text"/>	<input type="text"/>
Pager	Fax	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Can be contacted by service provider		

## Property Information

**Street:** Enter the **street number and name**, and then click the **Populate** button. CMS will distribute the address into the appropriate fields.

**Street #:** Type the **Street Number** directly into this field if not using the Populate option.

**Prefix:** Type the **Prefix** directly into this field if not using the Populate option.

**Street:** Type the **Street Name** directly into this field if not using the Populate option.

**Suffix:** Type the **Suffix** directly into this field if not using the Populate option.

**Unit #:** Type the **Unit Number** directly into this field if not using the Populate option.

**Zip:** Enter the subject's **Zip Code**, and then click the **Complete** button. CMS will auto-populate the City, State, and County fields based on the zip code entered.

**City:** Type the **City** directly into this field if not using the Complete option.

**State:** Use the drop-down arrow to select the **State** if not using the Complete option.

**County:** Type the **County** directly into this field if not using the Complete option.

**Property Type:** Use the **drop-down arrow** to select: **Condo Hotel, Condominium, Cooperative, Duplex – 2 Unit, Duplex – 3 Unit, Duplex – 4 Unit, High Rise, Low Rise, Lot, Manufactured, Mobile Home, PUD, SFR Attached, SFR Detached, or Vacant Land.**

**Loan Purpose:** Use the **drop-down arrow** to select: **Acquisition, Cash Out, No Cash Out – Refi, Other, or Purchase.**

**Occupancy Type:** Use the **drop-down arrow** to select: **Investor, Other, Primary Residence, or Second Home.**

**Sales Price:** Enter **Sales Price**. This is an optional field.

**Original Purchase Price:** Enter **Original Purchase Price**. This is an optional field.

**Access Instructions:** Enter any instructions to pass on to the assigned service provider. These instructions will appear on the service engagement letter. **Note:** Any text entered in the Access Instructions box will first go through an approval process before the order is assigned to a service provider.

Property Information				
Street				
<input type="text" value="123 Westbury Circle"/>				<input type="button" value="Populate"/>
Street # *	Prefix	Street *	Suffix	Unit #
<input type="text" value="123"/>	<input type="text"/>	<input type="text" value="WESTBURY"/>	<input type="text" value="CIR"/>	<input type="text"/>
Zip *		City *	State *	County *
<input type="text" value="38655"/>	<input type="button" value="Complete"/>	<input type="text" value="OXFORD"/>	<input type="text" value="MS"/>	<input type="text" value="LAFAYETTE"/>
Property Type *		Loan Purpose *	Occupancy Type *	
<input type="text" value="SFR Detached"/>		<input type="text" value="Purchase"/>	<input type="text" value="Primary Residence"/>	
Sales Price		Original Purchase Price		
<input type="text" value="\$0.00"/>		<input type="text" value="\$0.00"/>		
Access Instructions				
<input type="text" value="Contact Kim Jones for access to the property."/>				

## Service Information

**Service Type:** Use the **drop-down arrow to select the appraisal service** being ordered.

**Require 1004MC:** Mark the **Require 1004MC checkbox** to order the 1004MC along with the service type selected.

**High Value Property:** Mark this **checkbox** if the subject is a **High Value Property**.

**Sub Loan Type:** If the order is a Sub Loan, use the drop-down arrow to select: **203(k), FHA, USDA, or VA**. If 203(k) or FHA is selected, the **Government Case Number** field will be available.

**Provider Fee:** The fee being paid to the service provider assigned to the order will be displayed.

**Note:** Depending on how you are set up as a loan officer/broker, the Provider Fee field may not be available in the order form.

**Customer Price:** Displays the **price of the appraisal being charged to the Customer**.

**4.** Click **Submit** when finished filling out the order form.

**Service Information**

Service Type \*  
1004 - URAR

☒ Require 1004MC

☒ High Value Property

Sub Loan Type  
FHA

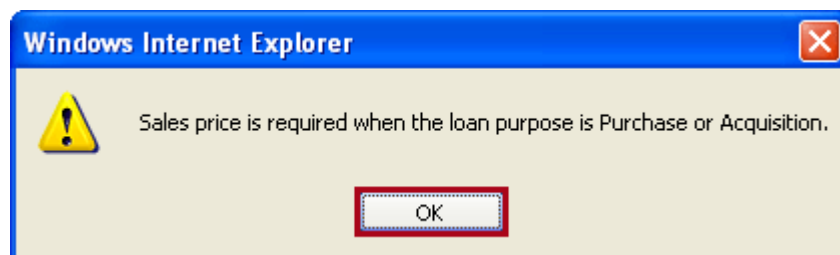
Government Case Number

Provider Fee  
\$375.00

Customer Price  
\$375.00

**Submit** 4

**Note:** If any required fields are left blank, CMS will provide a pop-up window indicating the missing information. Click **Ok** to close out the pop-up, enter the missing information, and click Submit again.



**Note:** If you are required to pay for the appraisal at the time of ordering, the **Order Payment** screen will open after clicking Submit on the order form. Enter all required fields, as highlighted in the screen shot below, and click the Submit button. Loan Officers and Brokers who are not required to pay up front will bypass this screen.

OrdersAdministrationLogout

User: Christina Cafiero

NewSearch

Order Payment

Credit Card Number: \*1234567812345678

Expiration Date (MMYY): \*1212

CVV2: \*123

Billing Address: \*123 Main

Billing Zip Code: \*12345

Submit

(What's this?)

cybertrustsecured site

VISA

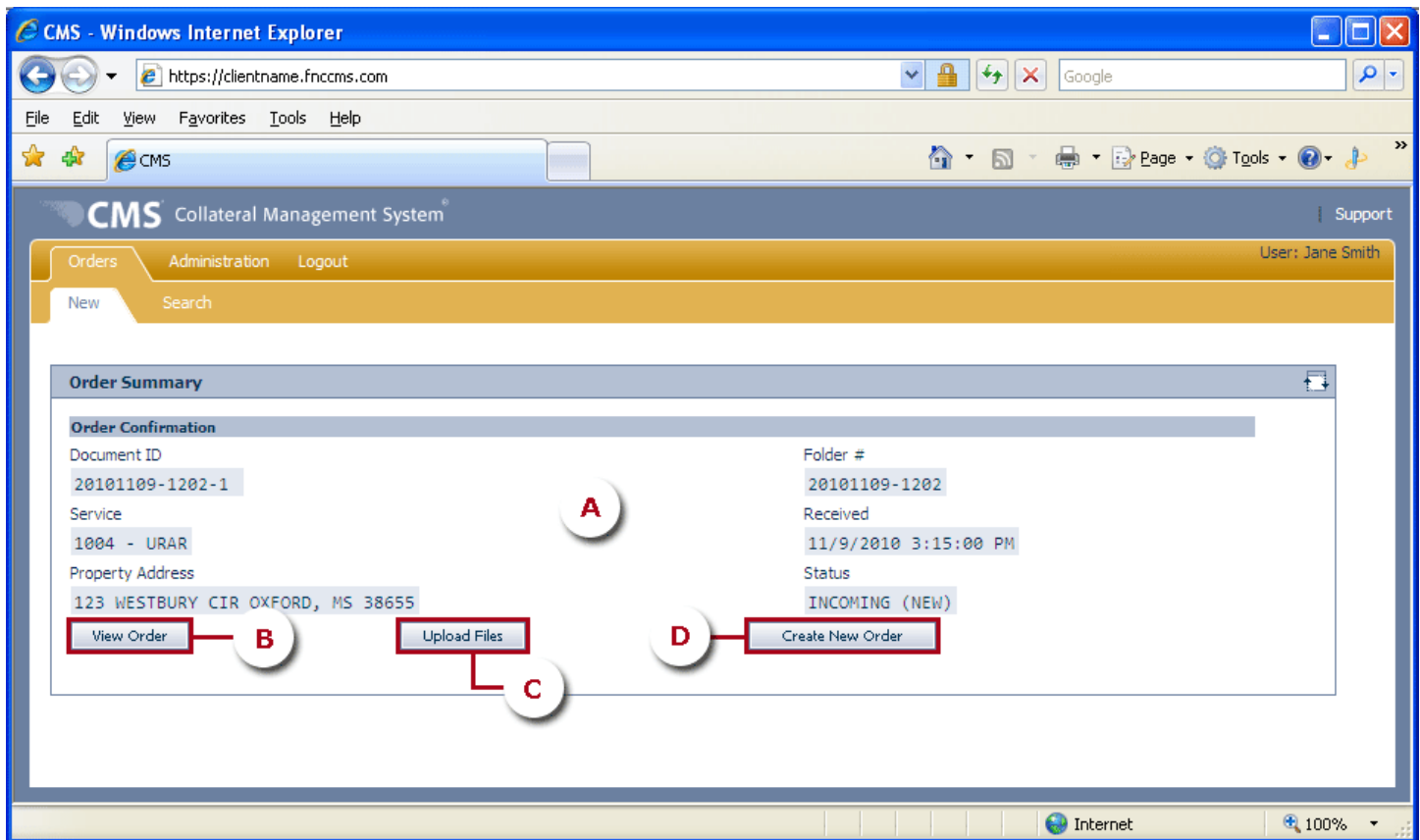
MasterCard

DISCOVER

## Order Confirmation

After an order is successfully created, the confirmation screen will appear with the following options:

- A.** The confirmation screen displays several details concerning the order that was just created. This information includes property address, load number, and the status of the order.
- B.** Click the **View Order** button to go directly to the order just created in CMS.
- C.** Click the **Upload Files** button to go to the Associated Files page to upload a document, like a sales contract, to the order.
- D.** Click the **Create New Order** button to go back to the order form to create another new order.

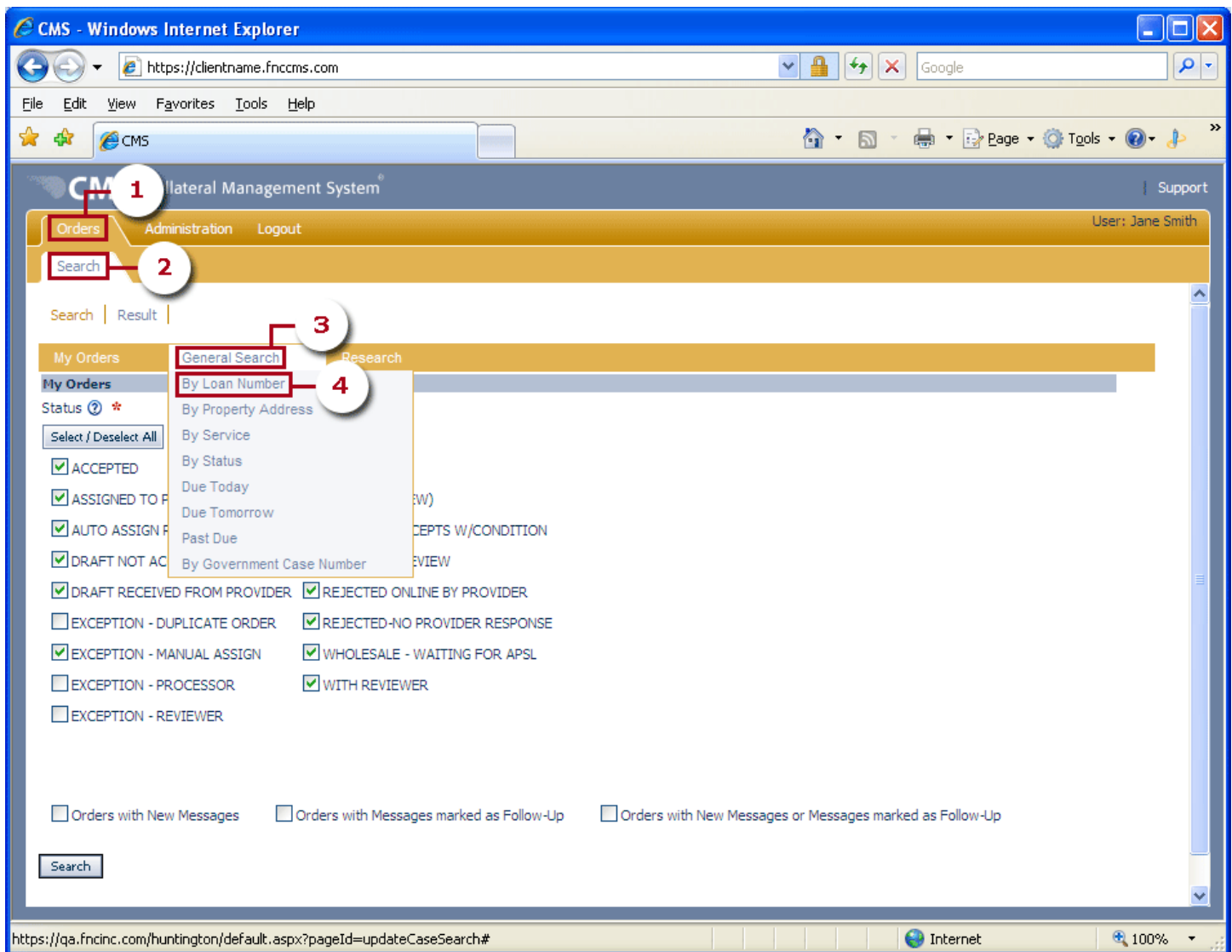


## Search for Orders

The Search module in CMS provides users the ability to enter search criteria and find the order(s) they wish to open. There are three search menus available which provide many options for a user to search for an order: **My Orders**, **General Search**, and **Research**. As MLOs who are searching for orders to check status, the General Search and My Orders menus will be the most useful search menus to utilize. The following pages provide a few examples on how to search for an order.

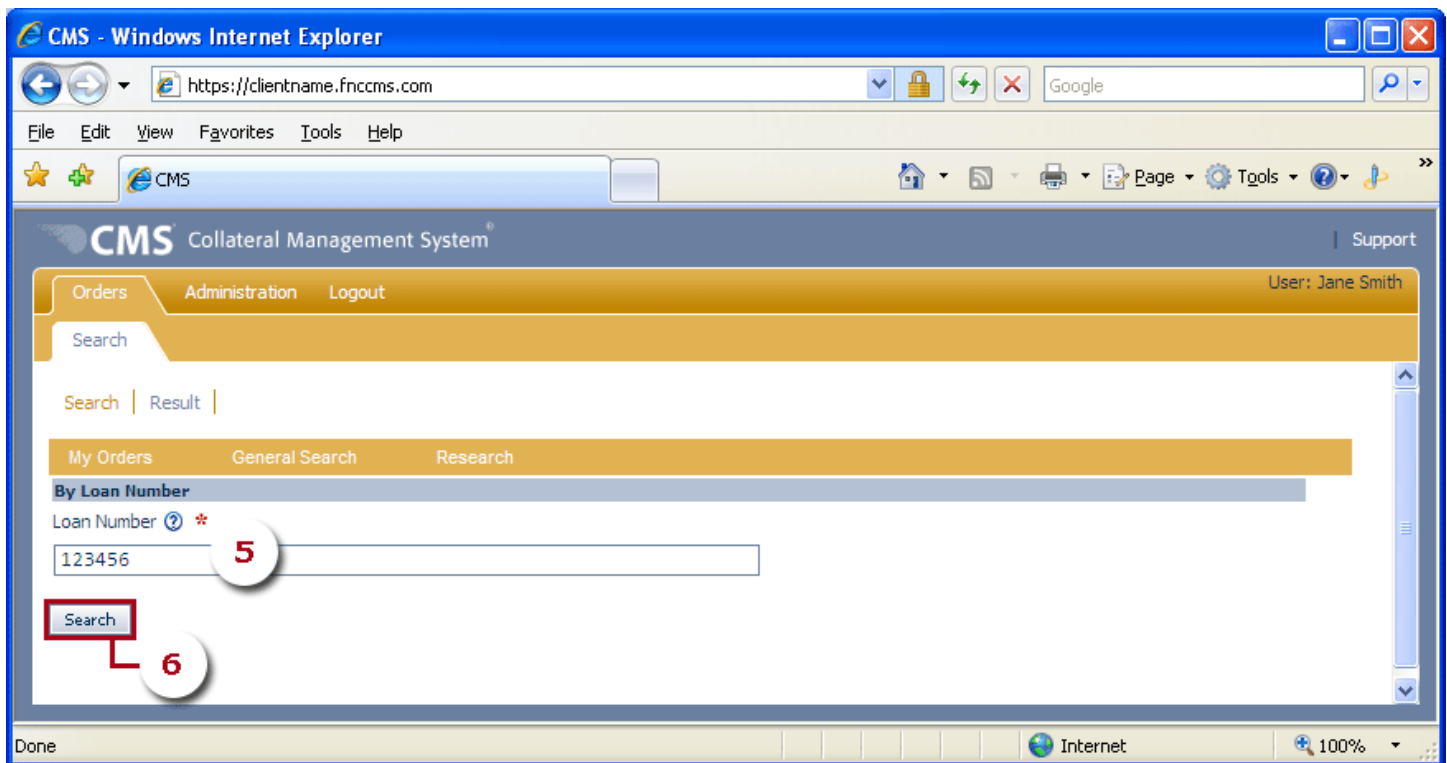
### Search by Loan Number

1. Click the **Orders** menu.
2. Select **Search**.
3. Click to expand the **General Search** menu.
4. Select **By Loan Number**.



5. Enter the **loan number** of the order being searched for.

6. Click the **Search** button.





7. All **orders matching the loan number** entered will be displayed in the Search Results.

8. To select an order, click the **magnifying glass** on the left side.

9. The **order will open** in the Workspace.

**Note:** Order status and Inspection Date can be found in both the Search Results and the Order Summary. Please refer to the red boxes in the screen shot below to view where the status and inspection Date are displayed in both sections.

The screenshot displays the CMS Collateral Management System interface within a Windows Internet Explorer browser window. The address bar shows <https://clientname.fncms.com>. The user is logged in as Jane Smith.

**Search Results:**

- Navigation: Orders, Administration, Logout
- Search bar: Search | Result |
- Buttons: Export to Excel, Generate Chart, Show Results, Hide Results
- Displaying page 1 of 1, items 1 to 1 of 1
- Table with columns: Loan #, Status, Service Name, Borrower, Processor, Reviewer, Order Date, Due from Service Provider, Date Draft Received, Due to Customer, Inspection Date, Loan Officer/Broker.
- Row 1: Loan # 123456, Status ASSIGNED TO PROVIDER, Service Name 1004 - URAR, Borrower John Smith, Processor Jane Smith, Order Date 11/24/2010 10:02:59 AM, Due from Service Provider 11/24/2010, Due to Customer, Inspection Date 11/29/2010, Loan Officer/Broker Jane Smith.
- Displaying page 1 of 1, items 1 to 1 of 1
- Legend: Past Due or Due Today (from Service Provider) (red square), Due Tomorrow (from Service Provider) (orange square), Selected (yellow square).

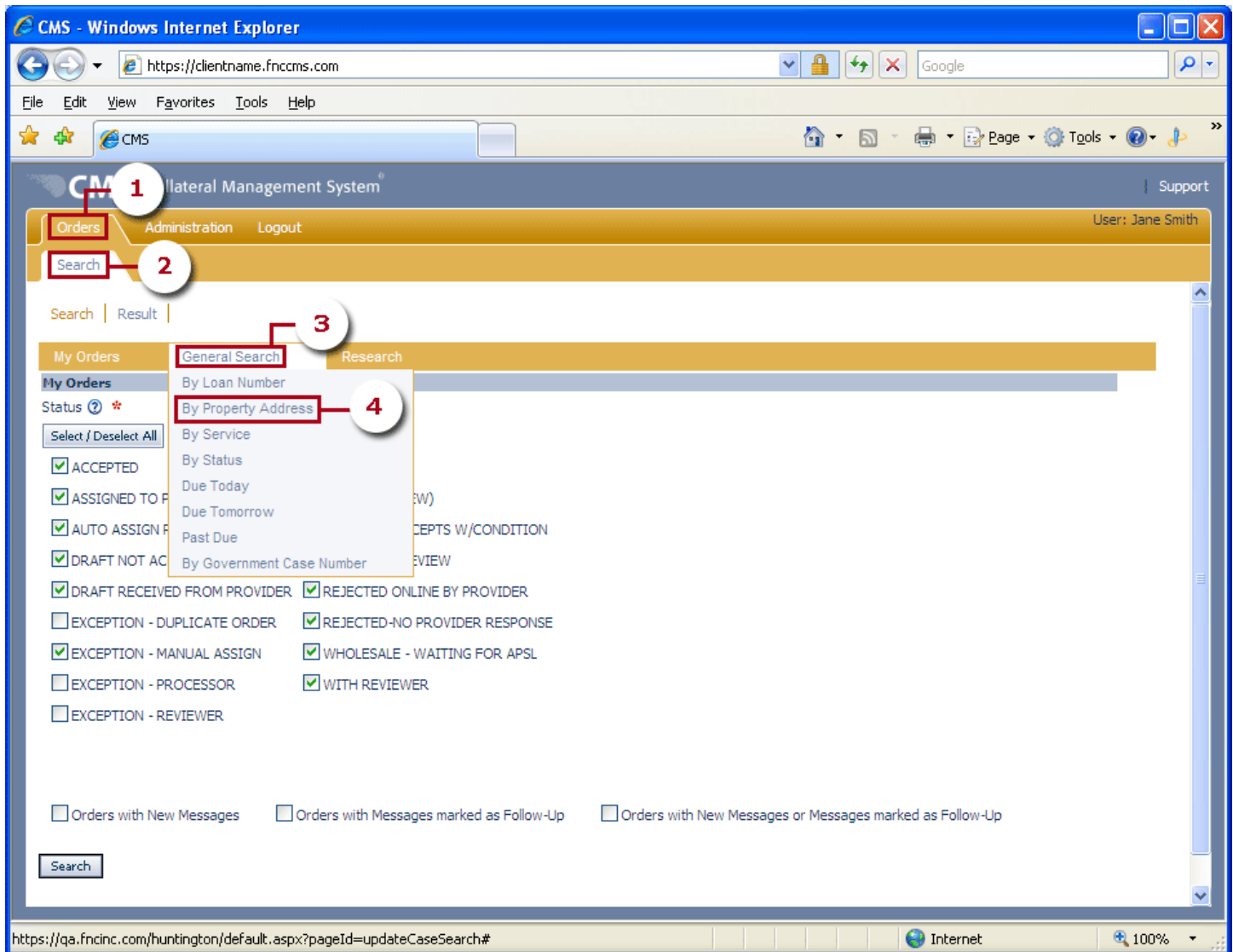
**Order Summary:**

- Order Locked By: Jane Smith 11/24/2010 10:56:08 AM
- Close Order button
- Doc Status: ASSIGNED TO PROVIDER
- Loan #: 123456, Doc ID: 20101124-1242-1, Folder #: 20101124-1242
- Service: 1004 - URAR
- Address: 1208 TULARE ST BAKERSFIELD, CA 93305
- Borrower: John Smith
- Appraised Value: \$200,000.00
- Customer: Test Customer
- Loan Amount: \$0.00
- Loan Officer/Broker: Jane Smith
- Channel: Retail
- Due to Customer:
- Sub Loan Type:
- Due From Service Provider: 11/24/2010
- Government Case Number:
- Inspection Date: 29-Nov-2010
- Reviewer:

Navigation: Loan Information | Associated Files | Log and Message

## Search by Property Address

1. Click the **Orders** menu.
2. Select **Search**.
3. Click to expand the **General Search** menu.
4. Select **By Property Address**.



5. Enter the **property address** of the order being searched for.

6. Click the **Search** button.

The screenshot shows the CMS Collateral Management System interface in Internet Explorer. The browser window title is "CMS - Windows Internet Explorer". The address bar shows "https://clientname.fncms.com". The page has a navigation bar with "Orders", "Administration", and "Logout". The user is logged in as "User: Jane Smith". The main content area has a "Search" tab selected. Below the "Search" tab, there are three sub-tabs: "My Orders", "General Search", and "Research". The "General Search" tab is active, and the "By Property Address" section is displayed. This section contains a form with the following fields:

Street #	Prefix	Street Name
1208		Tulare
Suffix	City	County
	Bakersfield	
State	Zip Code	
CA	93305	

A red box highlights the "Search" button, and a red circle highlights the "Prefix" field.

7. All **orders matching the property address** entered will be displayed in the Search Results.

8. To select an order, click the **magnifying glass** on the left side.

9. The **order will open** in the Workspace.

**Note:** Order status and Inspection Date can be found in both the Search Results and the Order Summary. Please refer to the red boxes in the screen shot below to view where the status and inspection Date are displayed in both sections.

The screenshot displays the CMS Collateral Management System interface within a Windows Internet Explorer browser window. The address bar shows <https://clientname.fncms.com>. The interface includes a navigation bar with 'Orders', 'Administration', and 'Logout' options, and a user profile for 'Jane Smith'. A search bar is located at the top of the main content area. Below the search bar, a table displays search results. The table has columns for Loan #, Status, Service Name, Borrower, Processor, Reviewer, Order Date, Due from Service Provider, Date Draft Received, Due to Customer, Inspection Date, and Loan Officer/Broker. A red box highlights the 'Status' column for the first row, which contains the text 'ASSIGNED TO PROVIDER'. Another red box highlights the 'Inspection Date' column for the same row, which contains the date '11/29/2010'. A magnifying glass icon is visible next to the loan number '123456' in the first row. Below the table, there are filters for 'Past Due or Due Today (from Service Provider)', 'Due Tomorrow (from Service Provider)', and 'Selected'. The 'Order Locked By' section shows 'Jane Smith 11/24/2010 10:56:08 AM'. The 'Order Summary' section provides detailed information about the order, including Loan #, Service, Address, Borrower, Customer, Loan Officer/Broker, Due to Customer, Reviewer, Doc ID, Appraised Value, Sales Price, Loan Amount, Due From Service Provider, Inspection Date, Folder #, Channel, Sub Loan Type, and Government Case Number. The 'Inspection Date' is highlighted with a red box. The interface also includes a 'Close Order' button and a footer with 'Loan Information', 'Associated Files', and 'Log and Message' links.

7

8

9

Loan #	Status	Service Name	Borrower	Processor	Reviewer	Order Date	Due from Service Provider	Date Draft Received	Due to Customer	Inspection Date	Loan Officer/Broker
123456	ASSIGNED TO PROVIDER	1004 - URAR	John Smith	Jane Smith		11/24/2010 10:02:59 AM	11/24/2010			11/29/2010	Jane Smith

Order Locked By: Jane Smith 11/24/2010 10:56:08 AM

Close Order

Order Summary

Doc Status: ASSIGNED TO PROVIDER

Loan #: 123456  
Service: 1004 - URAR  
Address: 1208 TULARE ST BAKERSFIELD, CA 93305  
Borrower: John Smith  
Customer: Test Customer  
Loan Officer/Broker: Jane Smith  
Due to Customer:  
Reviewer:

Doc ID: 20101124-1242-1  
Appraised Value:  
Sales Price: \$200,000.00  
Loan Amount: \$0.00  
Due From Service Provider: 11/24/2010  
Inspection Date: 29-Nov-2010

Folder #: 20101124-1242  
Channel: Retail  
Sub Loan Type:  
Government Case Number:

Loan Information | Associated Files | Log and Message

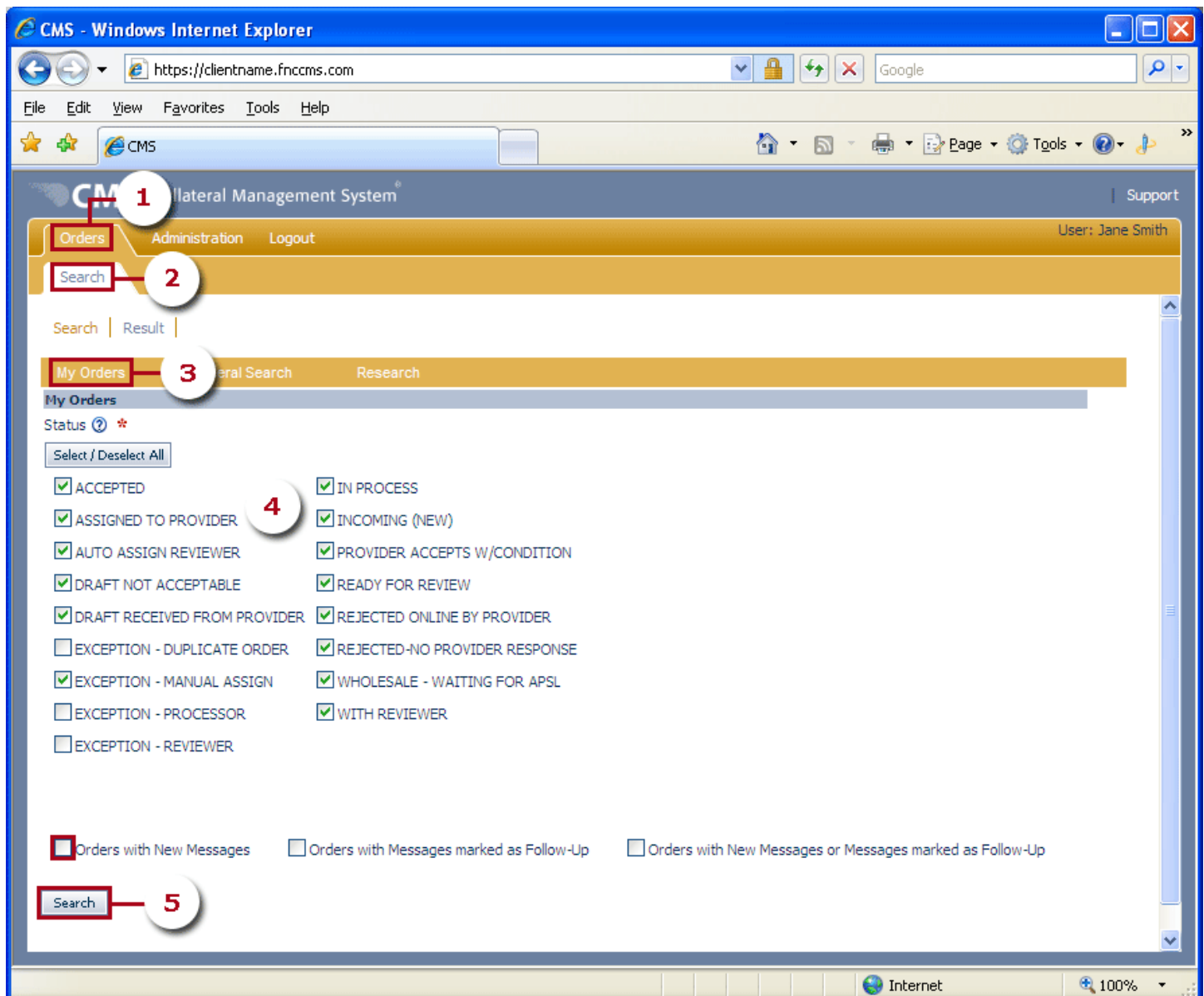
## My Orders

The My Orders search menu is a status search that will search for orders associated with the MLO. My Orders also provides the ability to search for orders that have **new messages** and/or **follow-ups**.

1. Click the **Orders** menu.
2. Select **Search**.
3. The **My Orders** search will open on the CMS screen.
4. Select the **status/statuses** for the orders you wish to search for.

**Note:** To search for orders that have a new message and/or a follow-up, mark the checkbox(es) at the bottom of the page.

5. Click **Search**.



6. All **orders associated with the MLO in the statuses selected will be displayed** in the Search Results.

7. Click the **magnifying glass** on the left side to select an order.

8. The **order will open** in the Workspace.

**Note:** Order status and Inspection Date can be found in both the Search Results and the Order Summary. Please refer to the red boxes in the screen shot below to view where the status and inspection Date are displayed in both sections.

The screenshot displays the CMS Collateral Management System interface within a Windows Internet Explorer browser window. The address bar shows <https://clientname.fncms.com>. The interface includes a navigation bar with 'Orders', 'Administration', and 'Logout' options, and a 'User: Jane Smith' indicator. A search bar is present with a magnifying glass icon (labeled 7) and a search button (labeled 8). Below the search bar, a table displays search results. The table has columns: Loan #, Status, Service Name, Borrower, Processor, Reviewer, Order Date, Due from Service Provider, Date Draft Received, Due to Customer, Inspection Date, and Loan Officer/Broker. The first row shows Loan # 123456, Status ASSIGNED TO PROVIDER, Service Name 1004 - URAR, Borrower John Smith, Processor Jane Smith, Order Date 11/24/2010 10:02:59 AM, Due from Service Provider 11/24/2010, Due to Customer 11/29/2010, and Loan Officer/Broker Jane Smith. The Status and Inspection Date are highlighted with red boxes. Below the table, there are filters for 'Past Due or Due Today (from Service Provider)', 'Due Tomorrow (from Service Provider)', and 'Selected'. The 'Order Locked By: Jane Smith 11/24/2010 10:56:08 AM' is displayed with a lock icon (labeled 9) and a 'Close Order' button. The 'Order Summary' section shows details for Loan # 123456, Doc ID: 20101124-1242-1, and Folder #: 20101124-1242. The summary includes fields for Service, Address, Borrower, Customer, Loan Officer/Broker, Due to Customer, Reviewer, Appraised Value, Sales Price, Loan Amount, Due From Service Provider, Inspection Date, Channel, Sub Loan Type, and Government Case Number. The Doc Status is ASSIGNED TO PROVIDER, and the Inspection Date is 29-Nov-2010, both highlighted with red boxes. The bottom of the interface shows tabs for 'Loan Information', 'Associated Files', and 'Log and Message'.

CMS - Windows Internet Explorer

https://clientname.fncms.com

File Edit View Favorites Tools Help

CMS

CMS Collateral Management System

Support

Orders Administration Logout User: Jane Smith

Search

Search Result

Export to Excel Generate Chart Show Results Hide Results

Displaying page 1 of 1, items 1 to 1 of 1

Loan #	Status	Service Name	Borrower	Processor	Reviewer	Order Date	Due from Service Provider	Date Draft Received	Due to Customer	Inspection Date	Loan Officer/Broker
123456	ASSIGNED TO PROVIDER	1004 - URAR	John Smith	Jane Smith		11/24/2010 10:02:59 AM	11/24/2010			11/29/2010	Jane Smith

Displaying page 1 of 1, items 1 to 1 of 1

Past Due or Due Today (from Service Provider) Due Tomorrow (from Service Provider) Selected

Order Locked By: Jane Smith 11/24/2010 10:56:08 AM Close Order

Order Summary

Doc Status: ASSIGNED TO PROVIDER

Loan #: 123456 Doc ID: 20101124-1242-1 Folder #: 20101124-1242

Service: 1004 - URAR

Address: 1208 TULARE ST BAKERSFIELD, CA 93305

Borrower: John Smith

Customer: Test Customer

Loan Officer/Broker: Jane Smith

Due to Customer:

Reviewer:

Appraised Value:

Sales Price: \$200,000.00

Loan Amount: \$0.00

Due From Service Provider: 11/24/2010

Inspection Date: 29-Nov-2010

Channel: Retail

Sub Loan Type:

Government Case Number:

Loan Information Associated Files Log and Message

Internet 100%

## Working with Orders

The following pages provide a brief explanation of each working page for an order and what information can be accessed within each page.

### Loan Information

The Loan Information page contains details about the order, including loan number and borrower name. If any changes need to be made to the information listed here, simply type directly into the appropriate field and click the **Save** button.

**Note:** The only information that cannot be updated on this page is Loan Number.

[Loan Information](#) | [Associated Files](#) | [Log and Message](#)

Loan Information

Loan Number	Borrower First Name *	Borrower Last Name *
123456	John	Smith
Loan Purpose *	Loan Amount *	Sales Price
Purchase	\$0.00	\$200,000.00
Owner Estimated Value	Additional Loan Number	
\$0.00		
Government Case Number	Sub Loan Type	
	--select one--	
<input type="checkbox"/> High Value Property	<input type="checkbox"/> 1004 MC Required	
Save		

## Associated Files

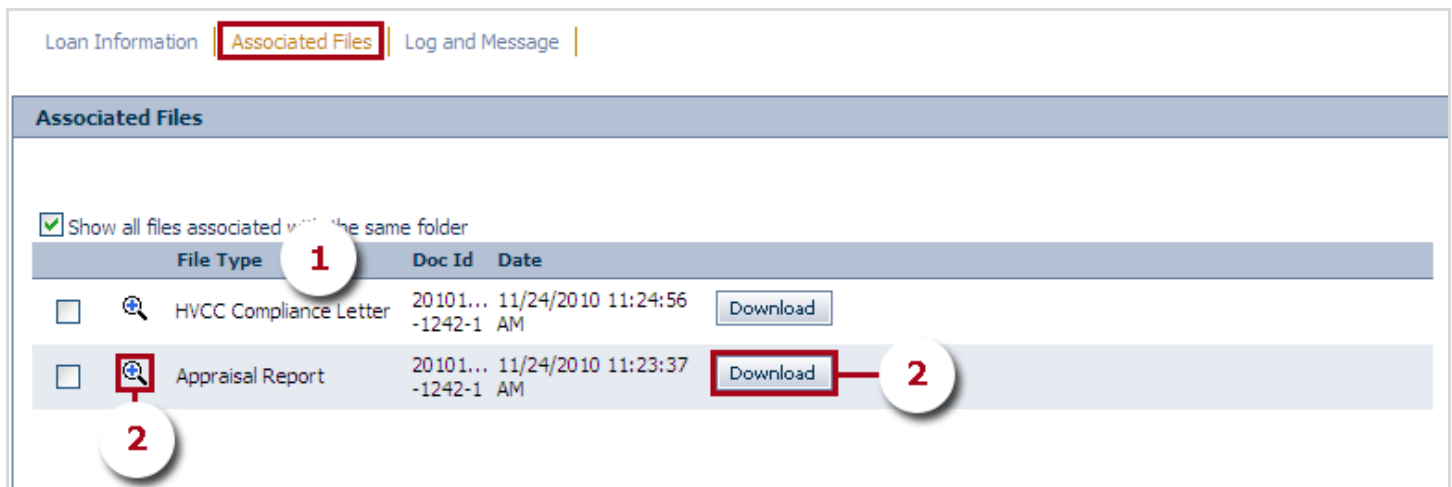
The Associated Files page provides access to all documents associated with the order. Once the order hits the **Approved** status, the completed appraisal product will become available for viewing. This page can also be used to upload documents to an order, like a purchase agreement, and to email files out from CMS.

### To Open an Associated File:

1. Under the **File Type** list, locate the file you wish to open.

**Note:** The completed appraisal product will always have the file type of **Appraisal Report**.

2. Click either the **magnifying glass** or **Download** button. The file will then open in a new window on the screen.



### Add a File to the Associated Files Page:

1. Under the **Add File** section, click the **Browse** button to retrieve the file being uploaded.

2. Use the drop-down arrow to select the **File Type**.

**Note:** It is important to select the correct file type when uploading a file. Your options are to select either **Purchase Agreement** when uploading a sales contract, or **Other Documents** for all other types of files.

3. Click the **Upload** button.





### Email a Document from Associated Files:



1. Mark the checkbox(es) of the file(s) you wish to send.
2. Enter the email address of the recipient(s). Separate multiple email addresses with a comma.
3. Click **Send Email**.

Loan Information | **Associated Files** | Log and Message

---

**Associated Files**

☒ Show all files associated with the same folder

	File Type	Doc Id	Date	
<input type="checkbox"/>	 HVCC Compliance Letter	20101... -1242-1	11/24/2010 11:24:56 AM	<a href="#">Download</a>
<input checked="" type="checkbox"/>	 Appraisal Report	20101... -1242-1	11/24/2010 11:23:37 AM	<a href="#">Download</a>

1

Email Selected Files to  2 [Send Email](#) 3

## Log and Message

The Log and Message Page contains a listing of all messages associated with an order. Messages can be composed, read, and replied to from this page. The Log and Message page should be used to send messages to the MLCs to request additional appraisal products for an order, like inspections and recertifications.

- A.** Click **Compose New Message** to enter and send a new message.
- B.** Each message received will list who the **message is from** along with the **subject** of the message.
- C.** A **closed envelope icon** indicates a new message. An **open envelope icon** indicates a read or opened message.
- D.** Click the **plus sign button to open** the body of the message. Click the same button to close the message.
- E.** Click the **reply icon** to send a reply to the received message.
- F.** Click the **edit button** to change the status of the message from new to read.
- G.** Mark the **Show system messages** checkbox to view all system generated messages.

The screenshot shows the 'Log and Message' page interface. At the top, there are tabs for 'Loan Information', 'Associated Files', and 'Log and Message'. Below the tabs, there is a header bar with the title 'Log and Message'. On the left side, there are two checkboxes: 'Show all messages in same folder' and 'Show system messages'. Below these is a 'Compose New Message' button. In the center, there is a table with columns: 'From', 'Subject', 'Doc ID', 'Service Type', 'Post Date', and 'Edit'. The first row of the table shows a message from 'Jane Smith' with the subject 'approved' and Doc ID '20101124-1242-1'. To the right of the table, there is a 'Print Current View' button. Callouts A through G are placed over various elements: A points to the 'Compose New Message' button; B points to the 'From' column header; C points to the closed envelope icon; D points to the plus sign icon; E points to the reply icon; F points to the edit button; and G points to the 'Show system messages' checkbox.

From	Subject	Doc ID	Service Type	Post Date	Edit
Jane Smith	approved	20101124-1242-1	1004 - URAR	11/24/2010 12:05:19 PM	

## To Compose a New Message:

1. Click **Compose New Message**.

Loan Information | Associated Files | **Log and Message**

**Log and Message**

☐ Show all messages in same folder ☐ Show system messages [Print Current View](#)

**Compose New Message** [Expand All](#)

	From	Subject	Doc ID	Service Type	Post Date	Edit
	Jane Smith	approved	20101124-1242-1	1004 - URAR	11/24/2010 12:05:19 PM	

[Compose New Message](#)

2. Enter a **Subject** and **Body**.

3. Click **Save**.

**Note:** Before clicking Save to send the message, you can check your spelling by clicking the **Check Spelling** link, or you can mark the message for a follow up (red flag) by selecting the **Follow up required** checkbox.

**Compose New Message**

From:  Loan #:  Document ID:

Subject:

Message Body:

57(4000)

☒ Mark As New

☐ Follow up required

Service Provider:  Customer:

[Check Spelling](#)

**Save** [Close](#)

# Administration

The Administration menu provides users with the ability to manually change their password at any time.

## Change Password

1. Click the **Administration** menu.
2. Select **Change Password**.
3. Enter your current password in the **Old Password** field.
4. Select and enter your new password into the **New Password** and **Confirm New Password** fields.

**Note:** Your password must include all four of the following requirements:

- One or more lowercase characters
- One or more uppercase characters
- One or more special characters
- One or more numbers

5. Select and enter a **Secret Question** and **Secret Answer**.
6. Click **Save** when you are finished.

**Note:** The password you select will expire in 90 days.

The screenshot shows a web browser window titled "CMS - Windows Internet Explorer" with the address bar displaying "https://clientname.fnccms.com". The page is the "Administration" section of the "CMS Collateral Management System". The user is logged in as "Jane Smith". The "Change Password" form is visible, with the following fields and callouts:

- 1. Callout pointing to the "Administration" menu tab.
- 2. Callout pointing to the "Change Password" link in the left sidebar.
- 3. Callout pointing to the "Old Password" field.
- 4. Callout pointing to the "New Password" and "Confirm New Password" fields.
- 5. Callout pointing to the "New Secret Question" and "New Secret Question Answer" fields.
- 6. Callout pointing to the "Save" button.

The form fields contain the following text:

- User Name: jsmith
- Old Password: [masked]
- New Password: [masked]
- Confirm New Password: [masked]
- New Secret Question: favorite color
- New Secret Question Answer: red

Buttons: Save, Cancel

**7.** A message will pop-up indicating you have successfully changed your password. Click the **OK** button.



## Support

FNC's Customer Support department is available to help with any questions you have concerning CMS. Here's how to reach them:

**Monday through Friday, 7:00 AM to 7:00 PM CST**

**Phone:** 1-888-963-3330

**Email:** [support@fncinc.com](mailto:support@fncinc.com)