

Point 10.0 Release Overview Additional Updates

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Housekeeping

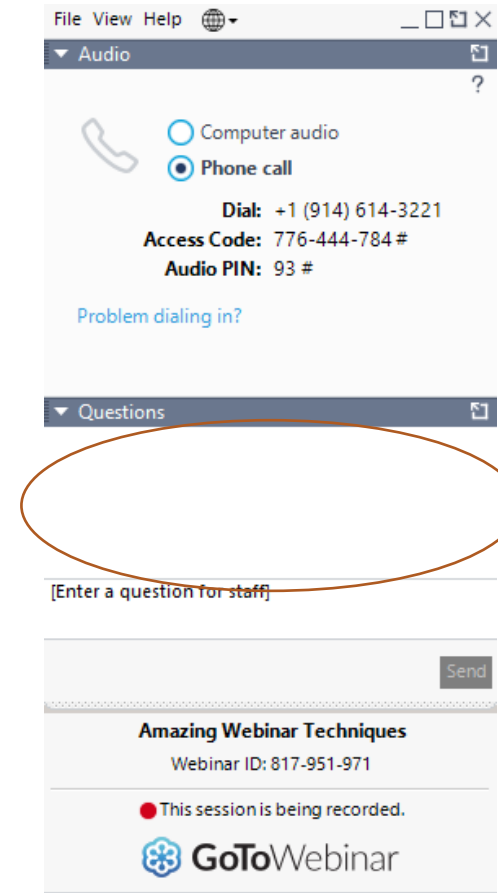
Type questions into the Questions box

Handouts are available for download

Technical Difficulties

GoToMeeting Support Line

888-259-8414



Presenter

Roshena Jackson | Calyx Software
Professional Services Consultant



- *10 + Years in the Mortgage Industry*
- *Processing*
- *Underwriting*
- *Post-closing*
- *Training*

Overview - Detail

- Auto-populate Lender Case Number from loan application to other screens
- INK-it login updated to remove WebCaster duplicate login credentials
- Verification of Assets via Zip to Point/PointCentral

Lender Case Number

Track > Agent List and Transmittal Summary

- The Lender Case Number from Loan Application page 1 will auto populate to:
 - Track > Agent List
 - Transmittal Summary

B Loan Application (1003) - Page 1

The income/assets of a person other than Borrower will be used...
 The income/assets of the Borrower's spouse or other person will not be used...

I. TYPE OF MORTGAGE AND TERMS OF LOAN

Agency Case No Lender Case No

Lender Contact

License # State

NMLS

Cell/Alt

E-Mail

Company ³ Calyx Software Inc.

Lender Case#

License # State

License Authority

Authority URL

Branch #

NMLS

Address 3500 Maple ave

Broker Contact

License # State

NMLS

Cell/Alt

E-Mail

Company ³

License # State

License Authority

Authority URL

NMLS

Address

Phone

IV. Seller, Contract, And Contact Information

Seller

Company ³ Contact

Address: Title

Phone Ext

Seller No

Loan No

Inv Loan No

Commitment No

Contract No

INK-it login credentials

Removed WebCaster Duplicate Login Credentials

- Inputting WebCaster login credentials will no longer be required on the INK-it page when launched from the Print menu.
- Point will use the credentials stored in the Utilities menu.
- Creates the ability to toggle between WebCaster and Zip.

OLD

The screenshot shows the 'OLD' version of the INK-it interface. It features a window titled 'INK-it' with a light blue border. At the top, there are input fields for 'Send To Borrower Email' (containing '123213123'), 'Send To CoBorrower Email', and 'Document Package Name' (with a redacted orange bar). A 'Due Date' field shows '09/28/2018'. Below these is a checkbox for 'Send as one PDF'. A list box titled '(*) - Forms with Signature(s)' contains 'Forms Selected' and 'Loan Application - Pg 5: Employment(*)'. At the bottom, a red-shaded section titled 'WebCaster Administration Login Information' contains fields for 'Email Address' (with '33'), 'Web Site #' (with '33'), 'Loan Status: Password', and a 'Save Password' checkbox. Below this is a 'Sender's Information' section with fields for 'Name', 'Company' (with '123'), and 'Email Address'. 'Send/Retrieve' and 'Cancel' buttons are at the bottom.

NEW

The screenshot shows the 'NEW' version of the INK-it interface. It features a window titled 'INK-it' with a blue border. The top section is identical to the 'OLD' version, including the 'Send as one PDF' checkbox. The list box now shows 'Loan Application - Pg 5: Assets/Liabilities(*)'. The 'WebCaster Administration Login Information' section has been removed. A new 'Sender's Information' section is present, with fields for 'Name', 'Company' (with 'Calyx Software Inc.'), and 'Email Address'. 'Send/Retrieve' and 'Cancel' buttons are at the bottom.



Verification of Assets in Zip



Contact Loan and Property Personal **Financial** Declarations Demographic Submit ?

Instead of manually entering your asset information, would you like to use our automated account lookup and import feature to save you valuable time?

Yes No

Enter your last 4 digits of Social Security Number or Taxpayer Identification Number to import your Financial Institution information.*

By choosing "Yes", you agree that Great Demo Bank can receive your financial information from our trusted partners. [Terms of Use](#) and [Privacy Policy](#)

[Prev](#) [Next](#)

Import your asset information.



Choose your institution from the popular list below.



Can't find your institution? No problem, just search for it below to add it.

[Search >](#)

[Prev](#)



Verification of Assets in Zip

Import your asset information.



Sign In

Please enter your credentials for DagBank.

Username for DagBank

AccountChek.bank11

Password for DagBank

Next

Not your financial institution? Try a [new search](#)

Import your asset information.



My Accounts

Congratulations! Your shared accounts are ready to send to your lender. Click Finish to complete the process.

DAGBANKMULTILEVEL

ACCOUNT	BALANCE	SHARED?
TESTDATA	\$6,875.80	✓

DAGBANKCAPTCHA

ACCOUNT	BALANCE	SHARED?
TESTDATA1	\$9,044.78	✓
TESTDATA	\$44.78	✓

DAGBANK

ACCOUNT	BALANCE	SHARED?
TESTDATA	\$7,277.71	✓

Finish

Add Another Account

- Enter your credentials
- Add another account, if applicable
- Click **Finish**

Verification of Assets in Zip

Notification of VOA completed by borrower

Import from Zip/WebCaster

ID	Last Name	First Name	Email	Date	Loan Officer	Type	VOA Report
<input checked="" type="checkbox"/> 462	schnurr	Ryan	test@test.com	9/10/2018	Ryan Schnurr	Long	X



Carries to loan application page 3


Checking & Savings Accounts

From VOD

Name	Amount	Type	Account #	VOA
DaaBankMultilevel	\$6875.80	Checking	503-1124xxx	X
DaaBankCaptcha	\$9044.78	Savings	503-5623xxx	X
DaaBank	\$7277.71	Checking	503-1123xxx	X
DaaBankCaptcha	\$44.78	Checking	503-1123xxx	X

New Insert Edit Delete

Move: Up Dn



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