Southwest Financial Services eService Guide

Introduction

Southwest Financial Services eService functions are available from the eServices menu in ACI Report, or via the eServices Inbox. Users can retrieve orders, send status updates, send reports, and open the Inbox from the eServices menu. Users can download and preview orders, acknowledge orders, create reports, and send status updates within the Inbox.

eServices Inbox

The eServices Inbox is an order management tool. Orders in the Inbox are grouped by *Order Phase*. Retrieve, preview, and update status on orders, and create reports, within the Inbox. Creating a report from the associated order in the Inbox automatically populates the report with order information and saves time when writing the report.

Retrieve Orders

1. Click **eServices > Inbox**.
2. Select **Southwest Financial Services (SFS)** under *Synchronize Orders*.
3. If prompted, enter the Southwest Financial Services *User ID*, *User Name* and *Password*.

> **NOTE**: If password assistance is required, please email contractordevelopment@sfsltd.com.

4. Orders download to the Inbox.

> **NOTE**: An **!** (Exclamation point) to the left of an order indicates a request for accelerated services.

Preview Order

1. Select an order in the Inbox.
2. Click **Preview** under Order Tasks, or right-click the order and select **Preview**, or double-click the order to open the *Order Preview* window.
3. Select a task from *Other Tasks* (optional).

   Zoom In
   Increases the size of the order on screen.

   Zoom Out
   Decreases the size of the order on screen.

   Fit to Window
   Defaults the page view to the width of the window.

   Print
   Prints a copy of the order to the default printer. Click **OK** in the *Print Components* window.

   Options
   Opens the *eService Options* window.

4. Select a task from *SFS Order Tasks*

   Acknowledge Order
   Accept or decline the order.

   Create Report
   Create a report from the selected order.

   Update Status
   Update the order status. Select a status from the drop-down list and enter comments. Click **OK** to send the status update.

5. Click the **X** in the upper-right corner of the window to close the preview and return to the eServices Inbox.

Acknowledge Order

1. Select an order in the Inbox.
2. Click **Acknowledge Order** under Order Tasks, or right-click the order and select **Acknowledge Order**.
3. If prompted, enter the *User ID*, *User Name* and *Password* for the Southwest Financial Services account, and click **OK**.
4. Verify the *Client Order Number*, *Product Type*, and *Property Address*. Select an acknowledgement option, and click **OK**. Order acknowledgement is sent to Southwest Financial Services.

   I accept this order
   By selecting this option, you agree to complete the appraisal as requested by Southwest Financial Services. Enter comments in the *Comments* section.

   I decline this order
   By selecting this option, you decline the order. Provide an explanation in the *Comments* section.

5. Click **OK** on the *eServices Order Creation* window.

   > **NOTE**: The *Track File Number* is automatically populated with the SFS order number and may be edited. If ACI Track's auto-numbering system is enabled, the *Track File Number* is populated with the next sequential file number.

   > **TIP**: Select **Open Report File** to begin the appraisal. The report can be opened in a future ACI session by clicking **File > Open** on the Report menu.

6. The acknowledgement is confirmed. Click **OK**. If the order is accepted, the Order Status changes to *In Progress*. If the order is declined, the order is removed from the Inbox.

Order Tasks

1. Select an order. *Order Tasks* are displayed in the left pane.
2. Select a task under *Order Tasks*, or right-click an order and select a task from the menu.

   Preview
   Opens the order in a preview window for viewing prior to accepting the order.

   Acknowledge Order
   Accept or decline the order.

   Create Report
   Create a report from the selected order.

   Update Status
   Update the order status. Select a status from the drop-down list and enter comments. Click **OK** to send the status update.

   Delete
   Delete the order from the Inbox.

   Follow Up
   Attach a red flag marker to the Inbox record indicating that the order requires follow-up. Select the *Flag to* type from the drop-down-list, enter the *Due By* date and time (optional), and click **OK** to attach the flag.

   Flag Complete
   Grays out the flag marker indicating that the order is complete. This option is available on orders flagged for follow-up.

   Clear Flag
   Remove the follow-up flag from the order.

Other Tasks

Use the features in *Other Tasks* to refresh the Inbox, customize Inbox views, and select eServices options.

Refresh

Click **Refresh** to update the Inbox display.

Field Chooser

Use the *Field Chooser* to customize the column headings in the Inbox.

1. Click **Field Chooser**.
2. Drag and drop the column heading to the desired position on the heading bar.
3. To reposition a column, drag and drop the column heading to the new position on the heading bar.
4. Click **Hide Field Chooser** to close the *Field Chooser* selection box.

Additional Heading Options

Right-click the heading bar to select additional heading options.

Columns
Select a column to add or remove the column from the Inbox. A check mark indicates that a column is included in the Inbox.

Arrange By
Arrange the Inbox records by the selected column heading.

Sort Ascending
Sort the Inbox records in ascending order from oldest to newest.

Sort Descending
Sort the Inbox records in descending order from newest to oldest.

Group By This Field
Group the Inbox records by the selected column heading.

Show Group By Box
Display the *Group By* column(s) above the heading bar.

Remove this Column

Remove the selected column from the Inbox.

> **TIP**: Re-add columns using the **Field Chooser**. See *Field Chooser* for additional information.

Alignment

Align the data in the selected column. Select **Align Left**, **Align Right**, or **Center**.

Align Left

Text is left-justified in the column.

Align Right

Text is right-justified in the column.

Align Center

Text is centered in the column.

Best Fit

Sizes the columns to fit the width of the column data.

Restore to Default Layout

Returns the Inbox view to the default view.

Status Bar Options

Right-click the status bar and select a view option.

Collapse All Groups

Roll up the Inbox records to the group level. Only the group name is displayed.

Expand All Groups

Display all Inbox records.

Options

Access *eService Options.*

Restore to Default Layout

Returns the Inbox view to the default view.

Options

Click **Options** to open *eService Options*. To access eServices Options outside of the Inbox, click **eServices > Options** on the ACI Report menu bar.

eService Options

1. Click **Options**.
2. Select eServices preferences and click **OK**.

eServices Inbox
Inbox Path
The default Inbox path is
C:\Documents and Settings\All Users\Application Data\ACI\eServices\Inbox.

> **NOTE**: The Inbox path may change when sharing the Inbox over a network.

Hide Address for Accepted Orders
Deselecting this option displays the property address of accepted orders in the eServices Inbox.

Inbox Date Format
Select the date format from the drop-down list.

Diagnostic Options
Diagnostic Options are used to troubleshoot communication issues with providers. If diagnostics are required, ACI will provide instructions for their use.

Retrieval / Delivery Options

Retrieval/Delivery options are Lender/Client specific communication options.

1. Click **eServices Options > Retrieval/Delivery**.
2. Select **Southwest Financial Services (SFS)**.
3. Select preferences and click **OK**.

Southwest Financial Services

Upload URL
The Southwest Financial Services upload address.

User Name
The Southwest Financial Services account user name.

Password
The password associated with the Southwest Financial Services account.

User Type
Select the user type: *SFS*, *Appraiser*, or *Client*.

Clients can view uploaded report files
When this option is selected, clients can view the uploaded report files on-line.

Order's status after a successful send
Changes the *Order Status* to the selected type after the order is successfully sent. Select an order status from the drop-down list. The default Order Status is *Completed*. The order is removed from the Inbox after a successful report delivery.

Update Tracking System
When this option is selected, the tracking system is updated when accepting files, updating status with provider, and sending finished products.

eServices Menu

From the eServices Menu:

- Download and synchronize orders to the eServices Inbox
- Upload reports to the Southwest Financial Services site
- Send order status updates to Southwest Financial Services

Retrieve Orders

1. Click **eServices > Retrieve Orders > Southwest Financial Services (SFS)**.
2. If prompted, enter the *User ID*, *User Name* and *Password* for the Southwest Financial Services account, and click **OK**.
3. Orders download to the Inbox.

Send Report

1. Open a completed report. Click **eServices > Send Report > Southwest Financial Services (SFS)**.
2. If prompted, enter the *User ID*, *User Name* and *Password* for the Southwest Financial Services account, and click **OK**.
3. The *PAR Logic ReviewMaster* runs. If the report fails Review, click **View** and enter the requested corrections. After making corrections, run ReviewMaster until a *Pass* rating is received. Click **Continue**.

   > **NOTE**: Errors must be corrected in order for the report to receive a *Pass* rating. Warnings are informational messages that do not need to be corrected in order for the report to pass Review.

   > **TIP**: Double-click an error or warning to jump to the referenced field.

4. Select the *Print Components* and click **OK** to generate the PDF file.

   Select all
   Includes all forms.

Deselect all

Excludes all forms. Manually select the forms to print.

Invert

Automatically deselects the previously selected forms and selects the previously unselected forms.

> **TIP**: For forms with multiple sections (for example, the 1004 Single Family 2005), click **Details** and select the sections to print.

5. If prompted, select the order associated with the report and click **OK**.

> **NOTE**: If the report does not match any of the listed orders, enter a valid *Transaction ID* and click **OK**.

6. If the file uploads successfully, the *Appraisal Status* is updated. Click **OK**.

> **NOTE**: Appraisal Status is updated if the *Order's status after a successful send* option is selected in the Retrieval / Delivery eServices Options. The default Order Status is *Completed*. The order is removed from the Inbox after a successful report delivery.

7. Click **OK** on the *Send Transaction* confirmation window.

> **NOTE**: Transmission time varies based on Internet connection speed and report file size.

Send Status Updates

The Send Status feature is used to send updates on orders to Southwest Financial Services. Comments relevant to the status change are required when sending status updates.

1. Open a completed report. Click **eServices > Send Status >SFS**.
2. If prompted, enter the *User ID*, *User Name* and *Password* for the Southwest Financial Services account, and click **OK**.
3. Select the *Appraisal Status*, enter *Comments*, and click **OK**.

Appraisal Status Options	
Assigned	Unassigned
Cancelled	Deleted
Completed	Left Message
Inspected	No Answer
On Hold	Being Typed
Scheduled	Refer to Comments
In Review	Reviewed
In Progress	Received by Appraiser

4. The status is sent to Southwest Financial Services. Click **OK**.

WebUpdate

Web updates include new and updated software features and services, and general software updates and fixes.

Using WebUpdate

1. In ACI Report, click **Help > ACI WebUpdate**. Outside of Report, double-click the **ACI WebUpdate** icon on the computer desktop, or click **Start** > **All Programs** > **ACI Collection 32** > **ACI System Utilities** > **WebUpdate**.
2. If requested, enter the company password and click **OK**.
3. Click **Go** to download the updates. No *Special Update ID* is required.
4. Click **OK** when the update completes and click **Exit** to close the Web Updater.