

Instructions:

How to use the Point Interface with the AIS Web Based Credit Reporting Software



AUTOMATED INFORMATION SERVICES, INC
275 Halstead Avenue
Harrison NY, 10528
(914) 381-4545

For technical support please call...

John DePietro
Jdepietro@automatedinfo.com
(917) 251-6264

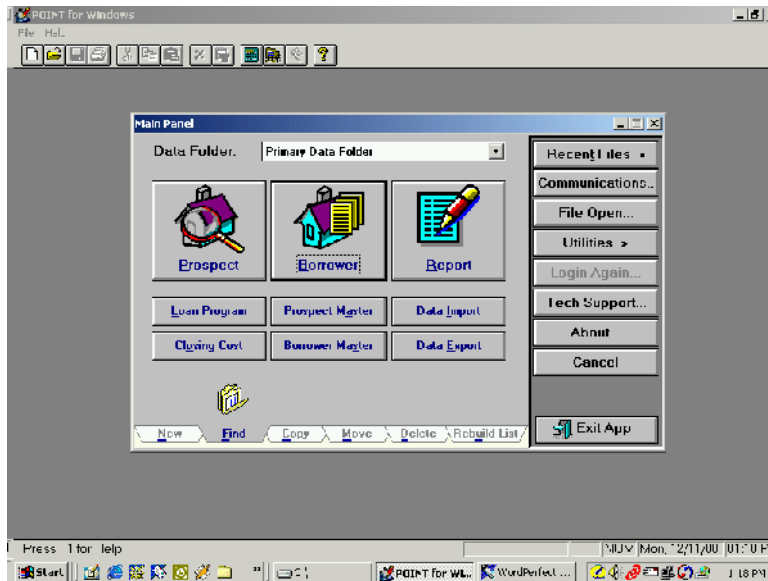
NOTE: This demonstration assumes you interface is already setup. If you need you interface setup and configured please contact AIS technical support.

Page 1

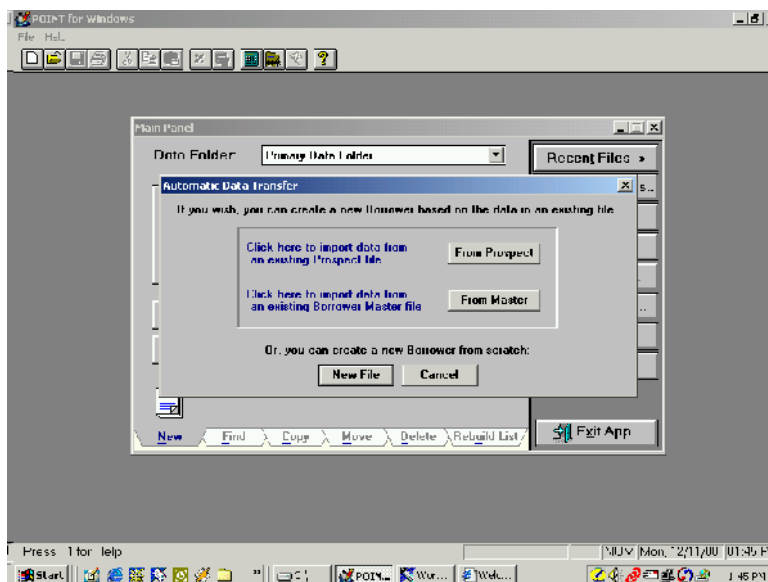
For these instructions we will use the name Kitty Cat for Demonstration Purposes.

Load Caylx Point and click on Borrower or Prospect.

You can choose an existing file or create a new one. For this demonstration we will create a new prospect.



Choose "New File" to create a new borrower or you can create the Borrower from an existing Prospect. For this demonstration we will create a new borrower.



Enter and save or retrieve personal information.

Enter in the Prospect's or Borrower's information.

You **must** enter at least the Name, SS#, and current Address

The screenshot shows a software application window titled "POINT for Windows - [Untitled]". The window contains a form for "Borrower Information". The form is divided into several sections:

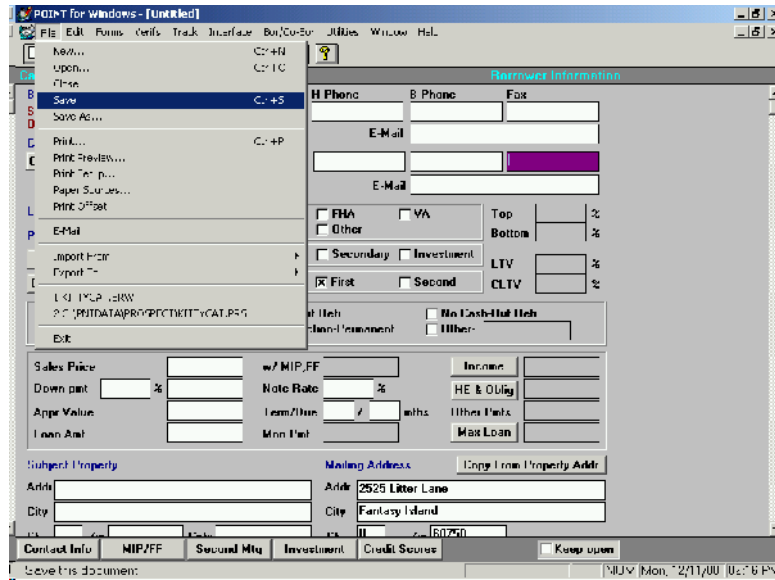
- Borrower Information:** Includes fields for Borrower Name (First: Kitty, Last: Cat), SSN (411-41-4111), H Phone, B Phone, Fax, and E-Mail.
- Co-Borrower:** Includes fields for Co-Borrower Name, SSN, and E-Mail.
- Loan Rep:** Includes a dropdown menu for Loan Rep and Processor.
- Loan Prog:** Includes a dropdown menu for Loan Prog.
- CC Scenario:** Includes a dropdown menu for CC Scenario.
- Purpose of Loan:** Includes checkboxes for Purchase, Construction, Cash-out Ref, Construction Ref, and Other.
- Sales Price:** Includes a text box for Sales Price.
- Down pay:** Includes a text box for Down pay and a percentage sign.
- Appr Value:** Includes a text box for Appr Value.
- Loan Amt:** Includes a text box for Loan Amt.
- w/ MIP/FF:** Includes a text box for w/ MIP/FF.
- Note Rate:** Includes a text box for Note Rate and a percentage sign.
- Term/Years:** Includes a text box for Term/Years and a checkmark.
- Max Loan:** Includes a text box for Max Loan.
- HE & O/ing:** Includes a text box for HE & O/ing.
- Other Fees:** Includes a text box for Other Fees.
- Mailing Address:** Includes a text box for Mailing Address (2525 Litter Lane) and a dropdown menu for City (Fantasy Island).
- Subject Property:** Includes a text box for Subject Property.

The status bar at the bottom of the window shows "Press F1 for help" and "MUW Mon, 2/21/00 10:53 PM".

Save this Prospect / Borrower and give it a valid file name.

Pull down the **File** menu and choose **Save**.

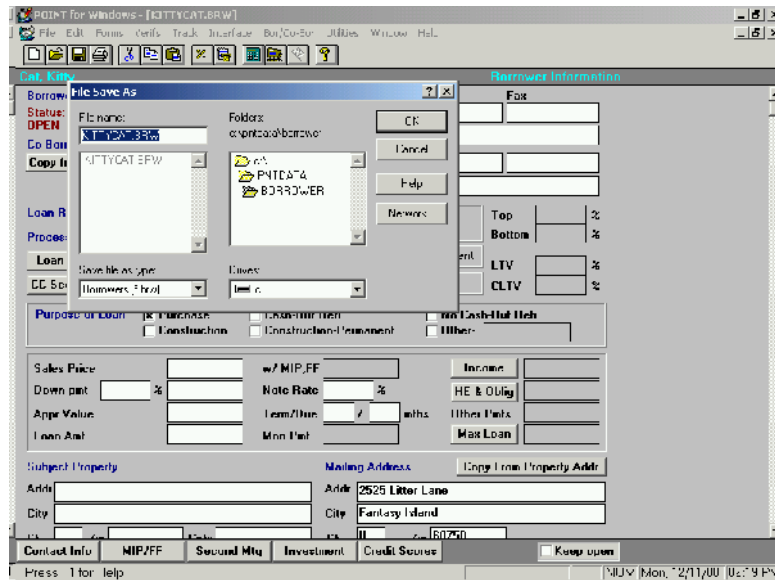
You **must** enter a unique file name.



Enter a unique file name and click **OK**

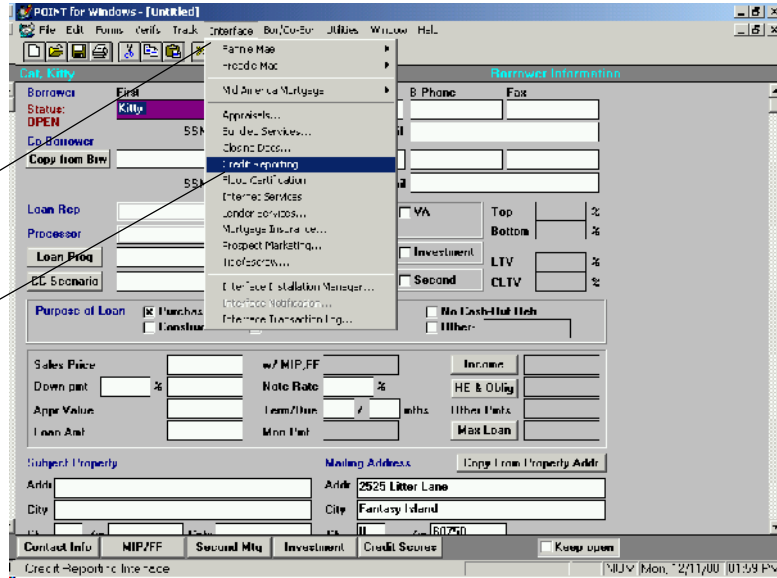
For this report we are using “kittykat”

If you are using an existing prospect or borrower when you click save you will not get a File name save dialogue box.



Send data to the Express Credit reporting software.

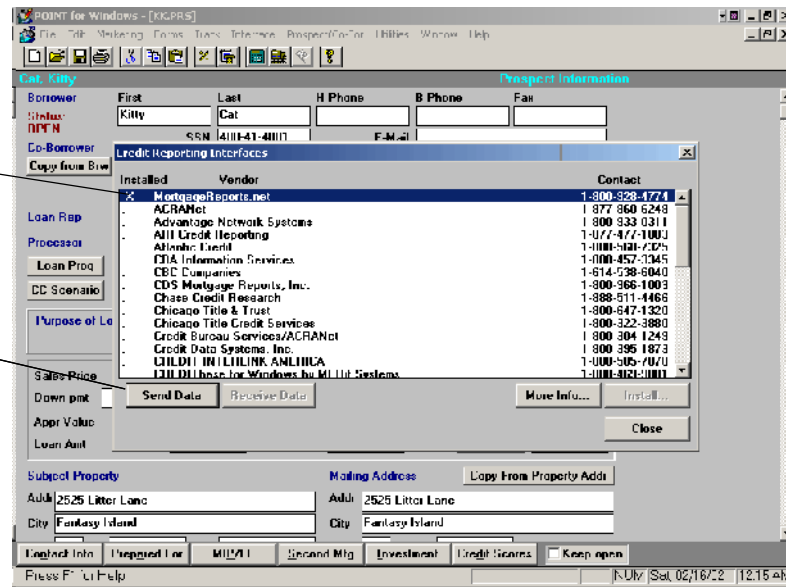
Pull down the **interface** tab from the menu bar and click on **credit reporting**.



Choose...

“Mortgage Reports.net”

...from the menu and then click the **Send Data** button.

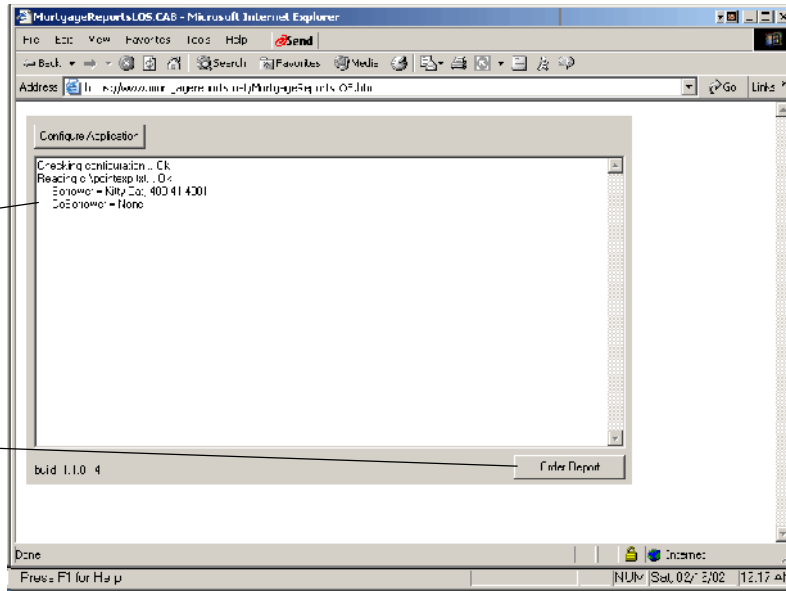


Select the Bureaus and pull credit.

The Borrower info will be retrieved from Point.

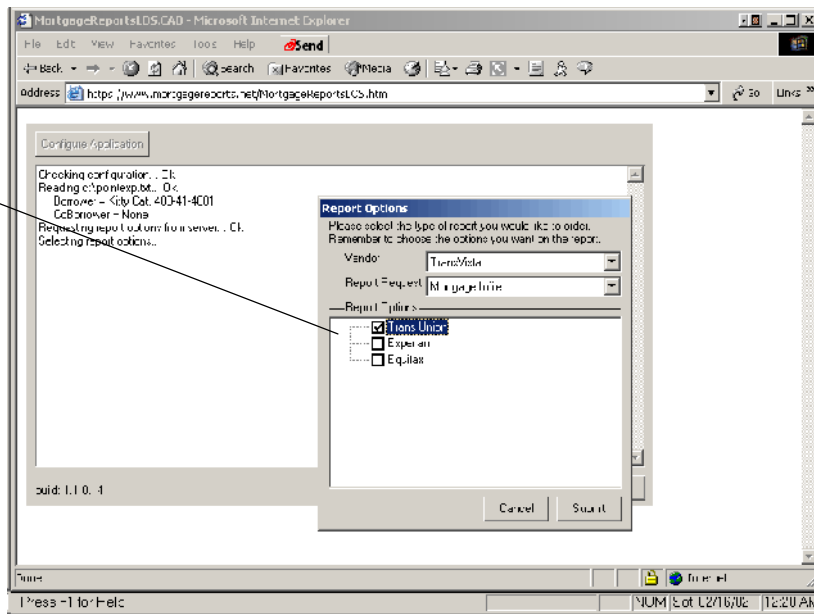
Verify the information.

Click ORDER REPORT to continue.



Select the Credit Bureaus you wish to pull

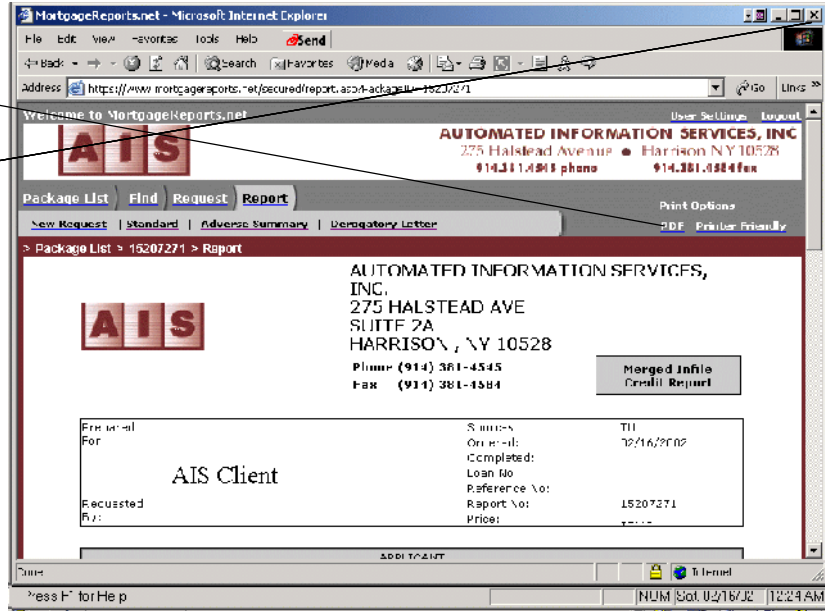
Click SUBMIT and credit report will be retrieved, displayed and exported back to Point automatically.



Review, Print Report and Receive Data

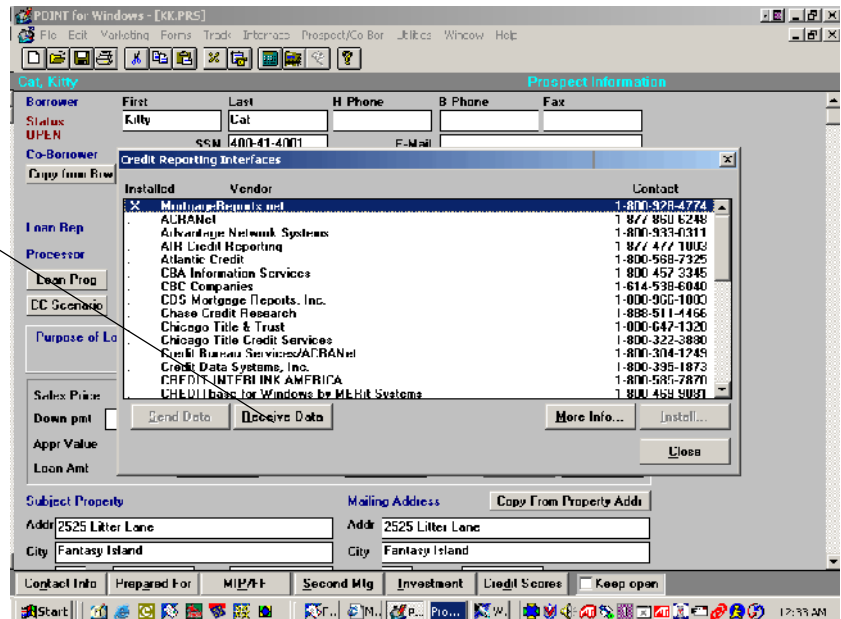
Review report on screen and Print Report if necessary

Close the Browser window and return to Point



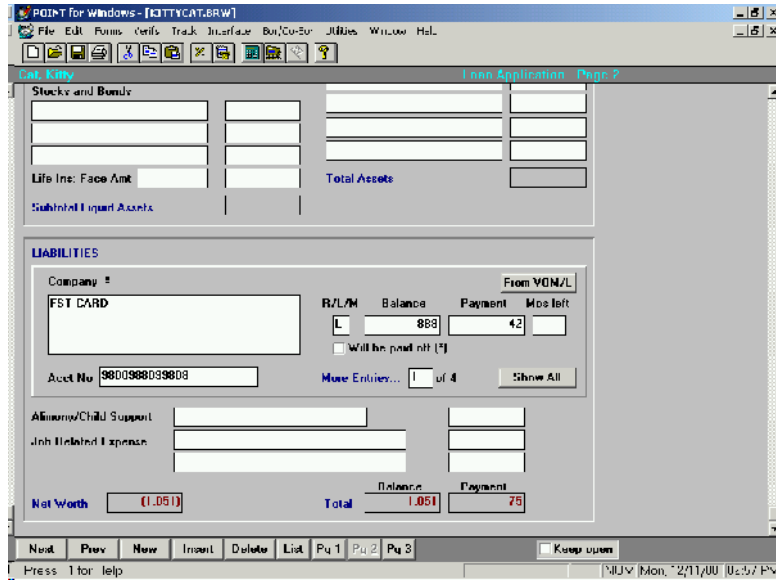
When you return to Point please click the RECEIVE DATA button to update the liabilities.

Then Click OK to confirm the update.



Verify the Liabilities on page two of the Loan application. (1003)

You're done importing the data. All the liabilities will import with the amounts and details.



AUTOMATED INFORMATION SERVICES, INC
275 Halstead Avenue
Harrison NY, 10528
(914) 381-4545

For technical support please call...

John DePietro
Jdepietro@automatedinfo.com
(917) 251-6264

