Genesis 2000 System Info Sheet

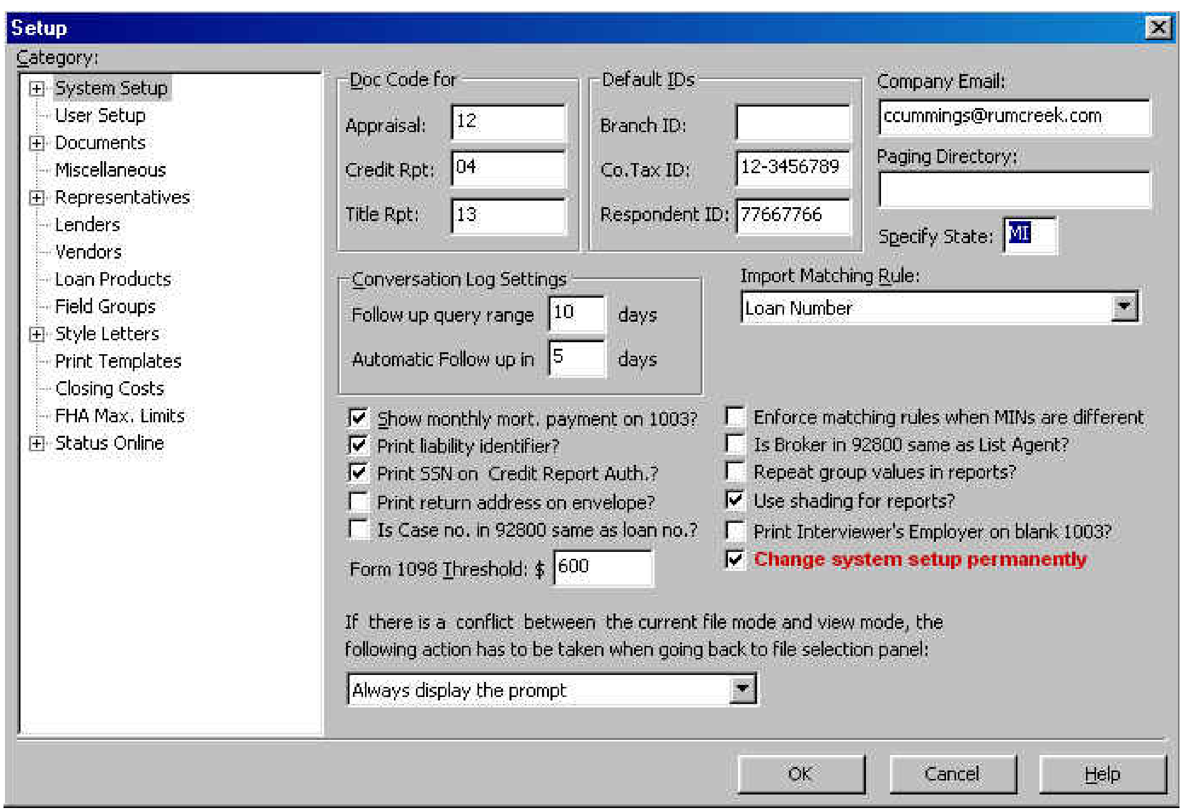
Loan Officer User Set-up

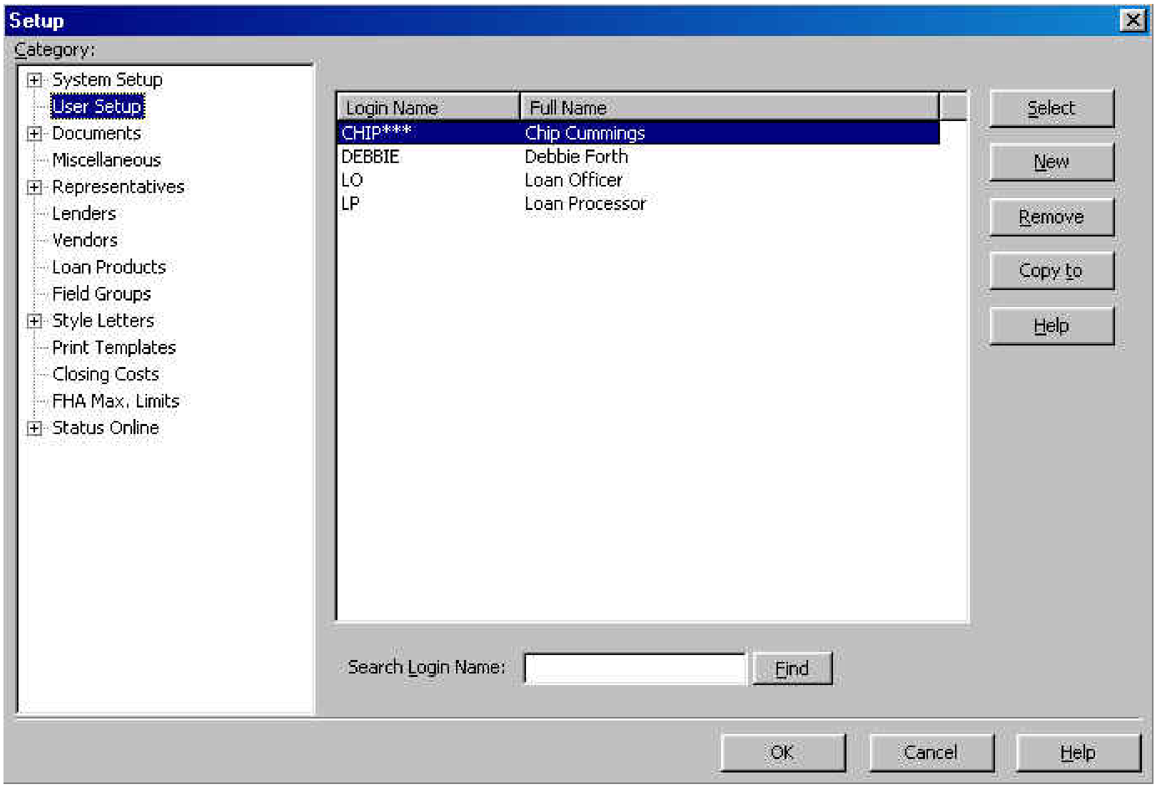
NOTE: The information contained in this report offers suggestions for setting up certain modules of the Genesis 2000 loan processing system. This document is prepared by Northwind Financial Corporation, who is not affiliated with Genesis 2000, Inc., or Ellie Mae, Inc. The information contained herein is only a suggestion, as all computer systems and operational requirements are individual and unique. Northwind does not warrant or guarantee any of the information contained within, and users specifically hold Northwind Financial harmless from any use or system modifications based upon information contained herein. Users with specific system questions, concerns, or problems are encouraged to contact Genesis 2000, Inc., or Northwind Financial Corp. directly.

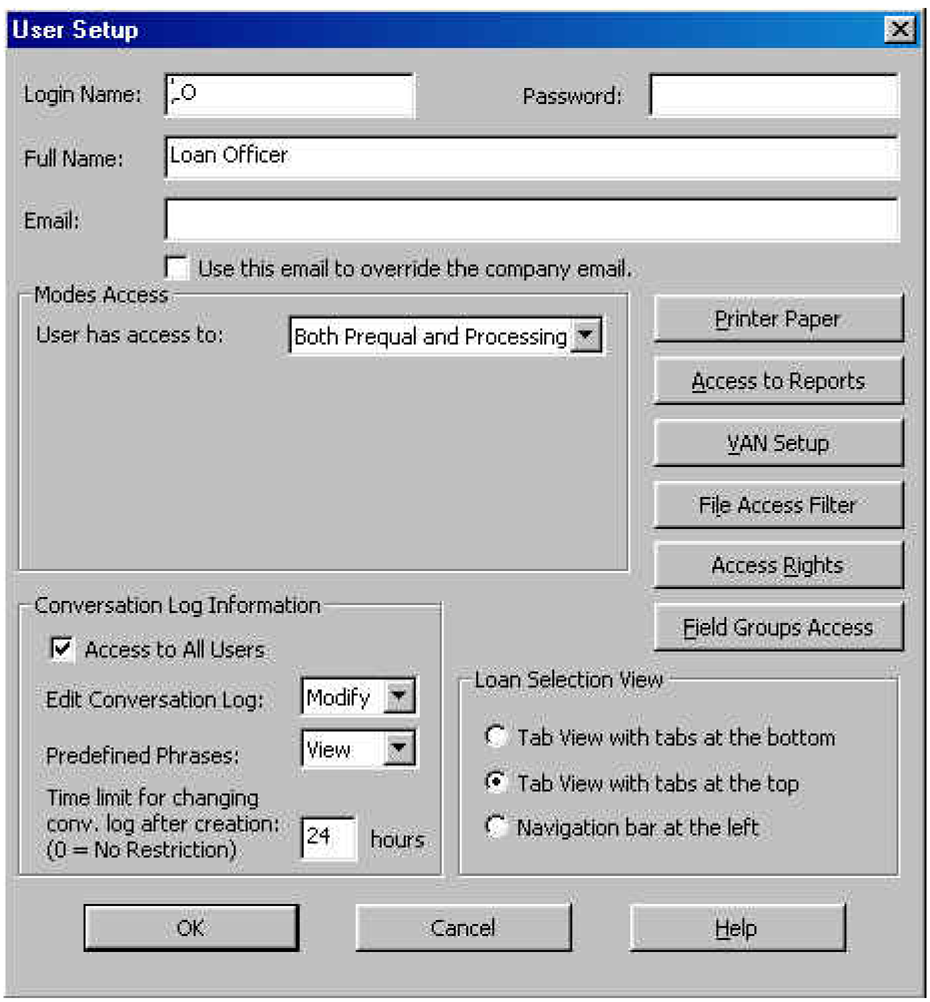
PURPOSE:

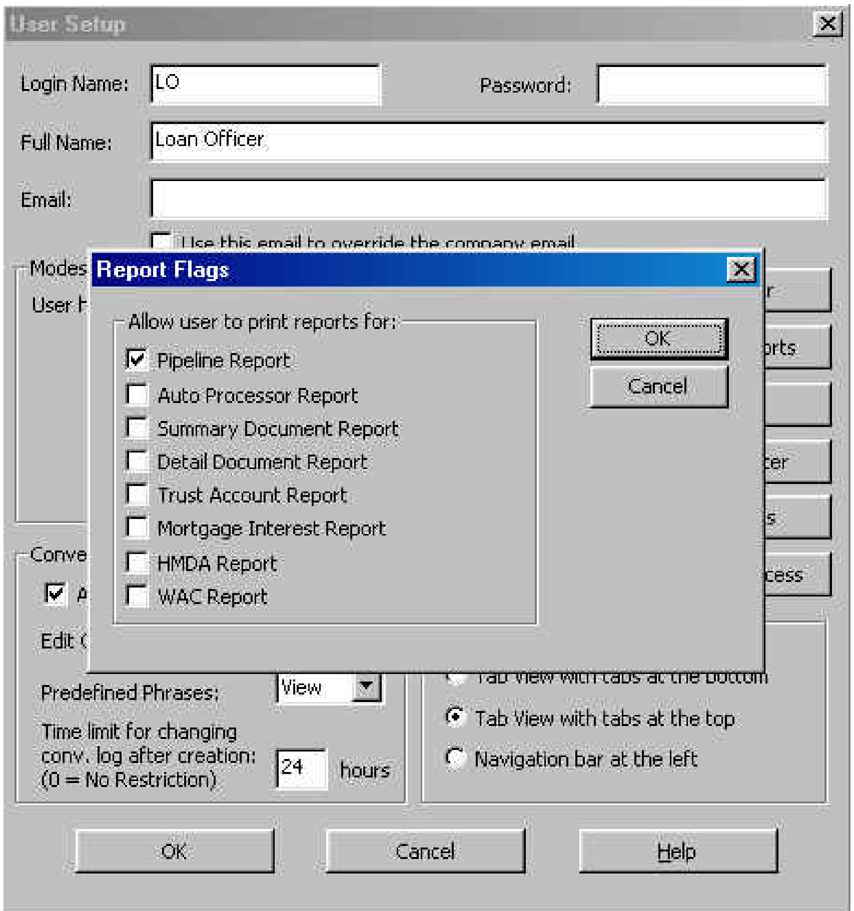
This report is designed to illustrate the common user set-up parameters for a LOAN OFFICER on the Genesis 2000 software system. Each screen is shown in order with switches and selections as indicated.

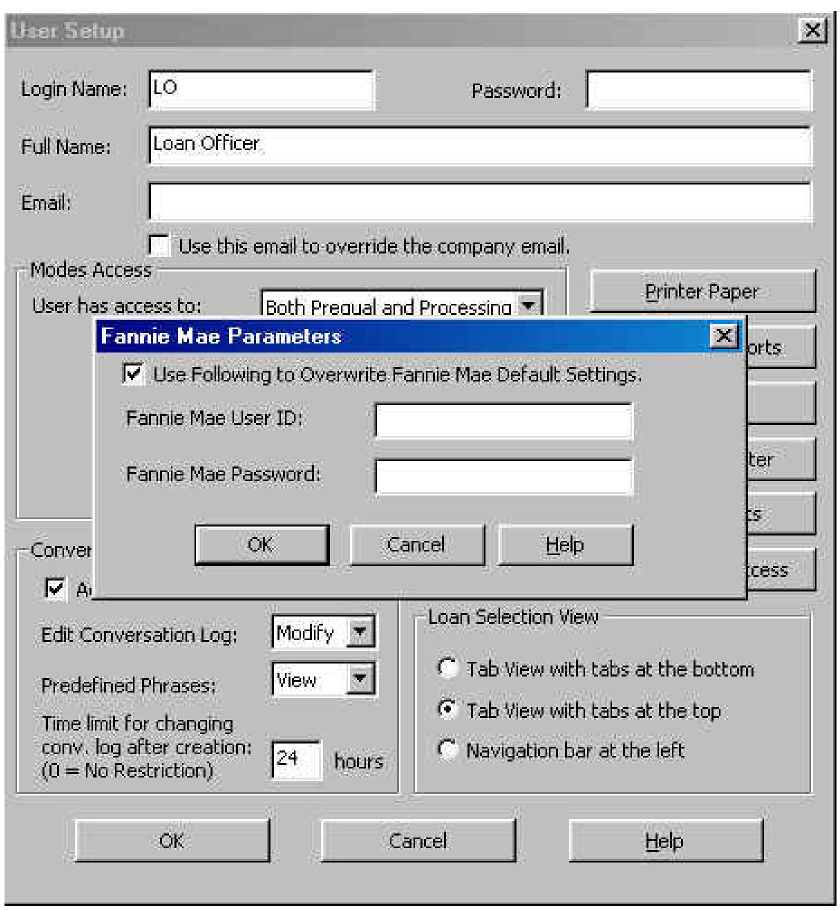
For a complete analysis of what each area affects, please refer to your Genesis 2000 manual, or a Northwind Financial representative.

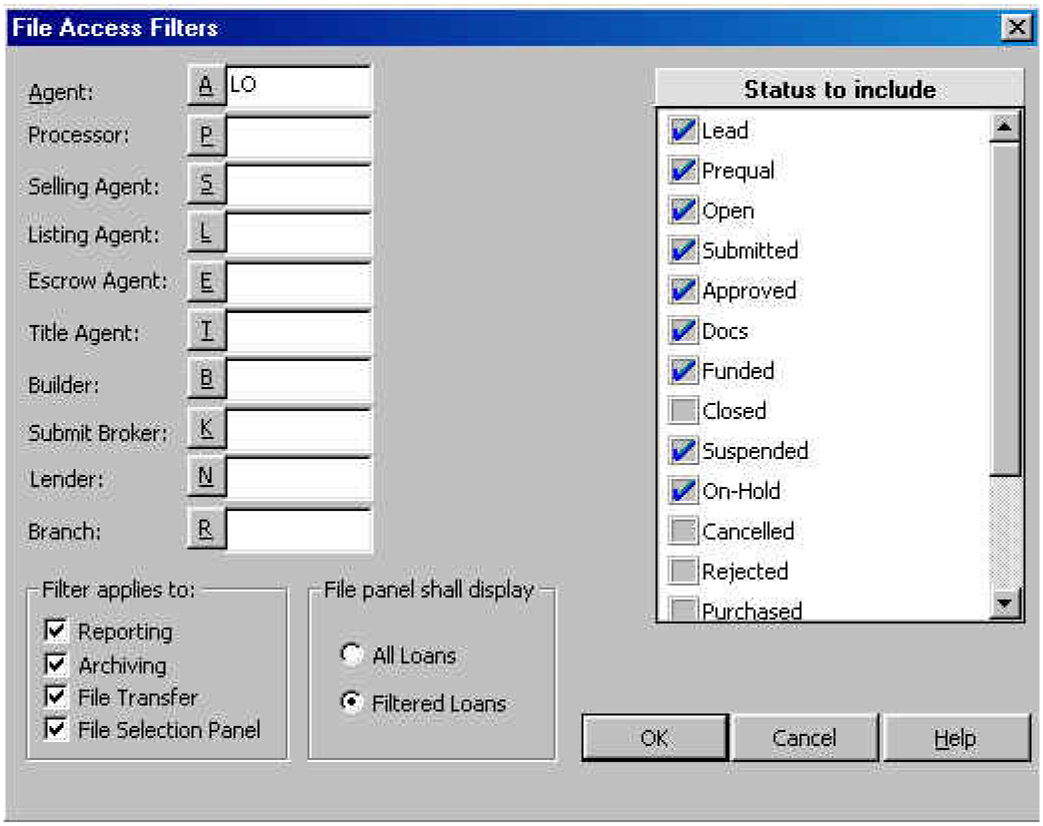


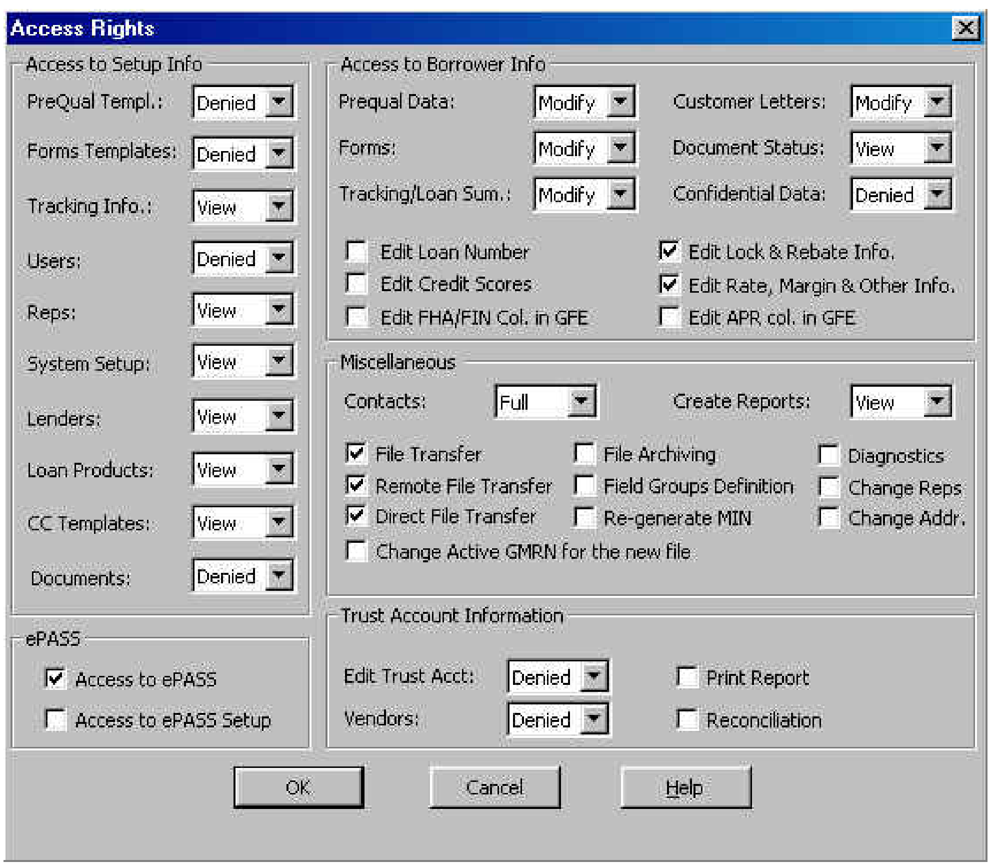

Setup
Category:
System Setup
User Setup
Documents
Miscellaneous
Representatives
Lenders
Vendors
Loan Products
Field Groups
Style Letters
Print Templates
Closing Costs
FHA Max. Limits
Status Online
Login Name
Full Name
CHIP***
Chip Cummings
DEBBIE
Debbie Forth
LO
Loan Officer
LP
Loan Processor
Select
New
Remove
Copy to
Help
Search Login Name:
Find
OK
Cancel
Help


User Setup
Login Name:
LO
Password:
Full Name:
Loan Officer
Email:
Use this email to override the company email.
Modes Access
User has access to:
Both Prequal and Processing
Printer Paper
Access to Reports
VAN Setup
File Access Filter
Access Rights
Field Groups Access
Conversation Log Information
Access to All Users
Edit Conversation Log:
Modify
Predefined Phrases:
View
Time limit for changing
conv. log after creation:
(0 = No Restriction)
24
hours
Loan Selection View
Tab View with tabs at the bottom
Tab View with tabs at the top
Navigation bar at the left
OK
Cancel
Help


User Setup
Login Name: LO
Password:
Full Name: Loan Officer
Email:
Report Flags
Allow user to print reports for:
Pipeline Report
Auto Processor Report
Summary Document Report
Detail Document Report
Trust Account Report
Mortgage Interest Report
HMDA Report
WAC Report
OK
Cancel
Predefined Phrases: View
Tab View with tabs at the top
Navigation bar at the left
Time limit for changing conv. log after creation: (0 = No Restriction) 24 hours
OK
Cancel
Help


User Setup
Login Name: LO
Password:
Full Name: Loan Officer
Email:
Use this email to override the company email.
Modes Access
User has access to: Both Prequal and Processing
Printer Paper
Fannie Mae Parameters
Use Following to Overwrite Fannie Mae Default Settings.
Fannie Mae User ID:
Fannie Mae Password:
OK
Cancel
Help
Edit Conversation Log: Modify
Predefined Phrases: View
Time limit for changing conv. log after creation: (0 = No Restriction) 24 hours
Loan Selection View
Tab View with tabs at the bottom
Tab View with tabs at the top
Navigation bar at the left
OK
Cancel
Help


File Access Filters
Agent: A LO
Processor: P
Selling Agent: S
Listing Agent: L
Escrow Agent: E
Title Agent: T
Builder: B
Submit Broker: K
Lender: N
Branch: R
Status to include
Lead
Prequal
Open
Submitted
Approved
Docs
Funded
Closed
Suspended
On-Hold
Cancelled
Rejected
Purchased
Filter applies to:
Reporting
Archiving
File Transfer
File Selection Panel
File panel shall display
All Loans
Filtered Loans
OK
Cancel
Help


Access Rights
Access to Setup Info
PreQual Templ.: Denied
Forms Templates: Denied
Tracking Info.: View
Users: Denied
Reps: View
System Setup: View
Lenders: View
Loan Products: View
CC Templates: View
Documents: Denied
Access to Borrower Info
Prequal Data: Modify
Customer Letters: Modify
Forms: Modify
Document Status: View
Tracking/Loan Sum.: Modify
Confidential Data: Denied
Edit Loan Number
Edit Lock & Rebate Info.
Edit Credit Scores
Edit Rate, Margin & Other Info.
Edit FHA/FIN Col. in GFE
Edit APR col. in GFE
Miscellaneous
Contacts: Full
Create Reports: View
File Transfer
File Archiving
Diagnostics
Remote File Transfer
Field Groups Definition
Change Reps
Direct File Transfer
Re-generate MIN
Change Addr.
Change Active GMRN for the new file
ePASS
Access to ePASS
Access to ePASS Setup
Trust Account Information
Edit Trust Acct: Denied
Print Report
Vendors: Denied
Reconciliation
OK
Cancel
Help

Genesis 2000 System Info Sheet

Loan Processor User Set-up

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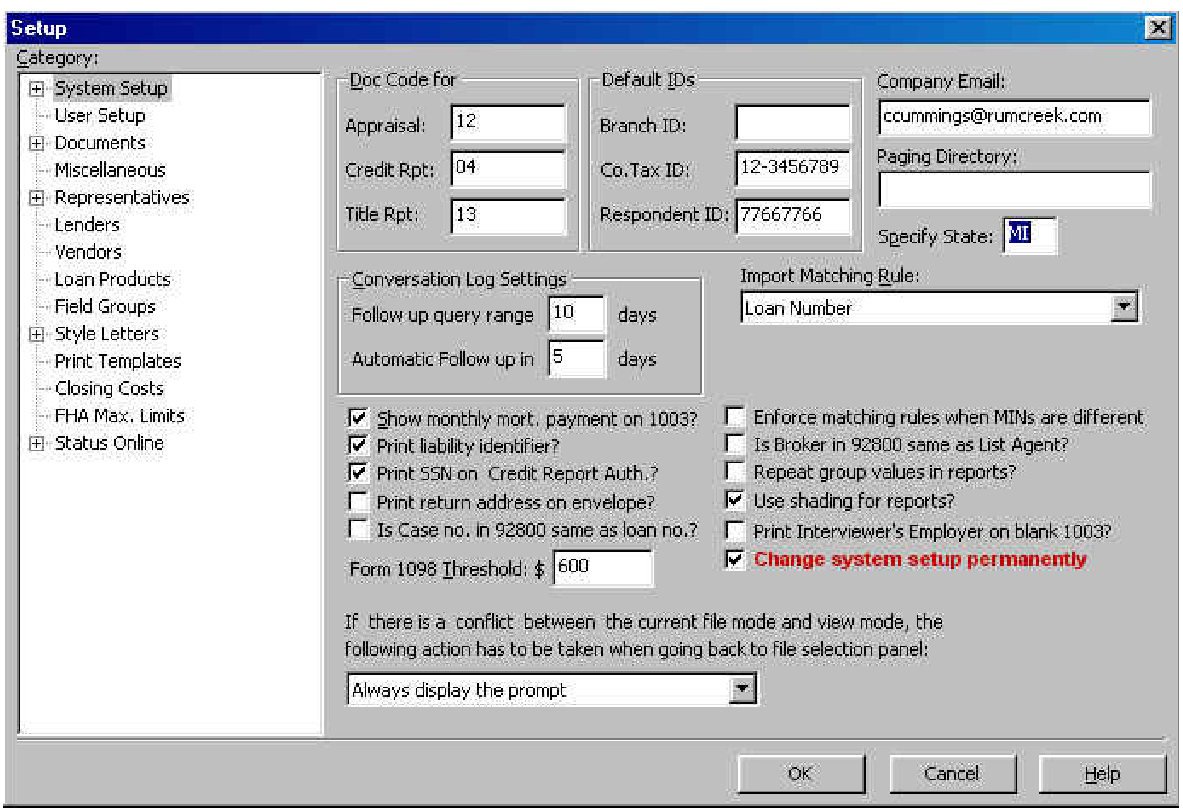
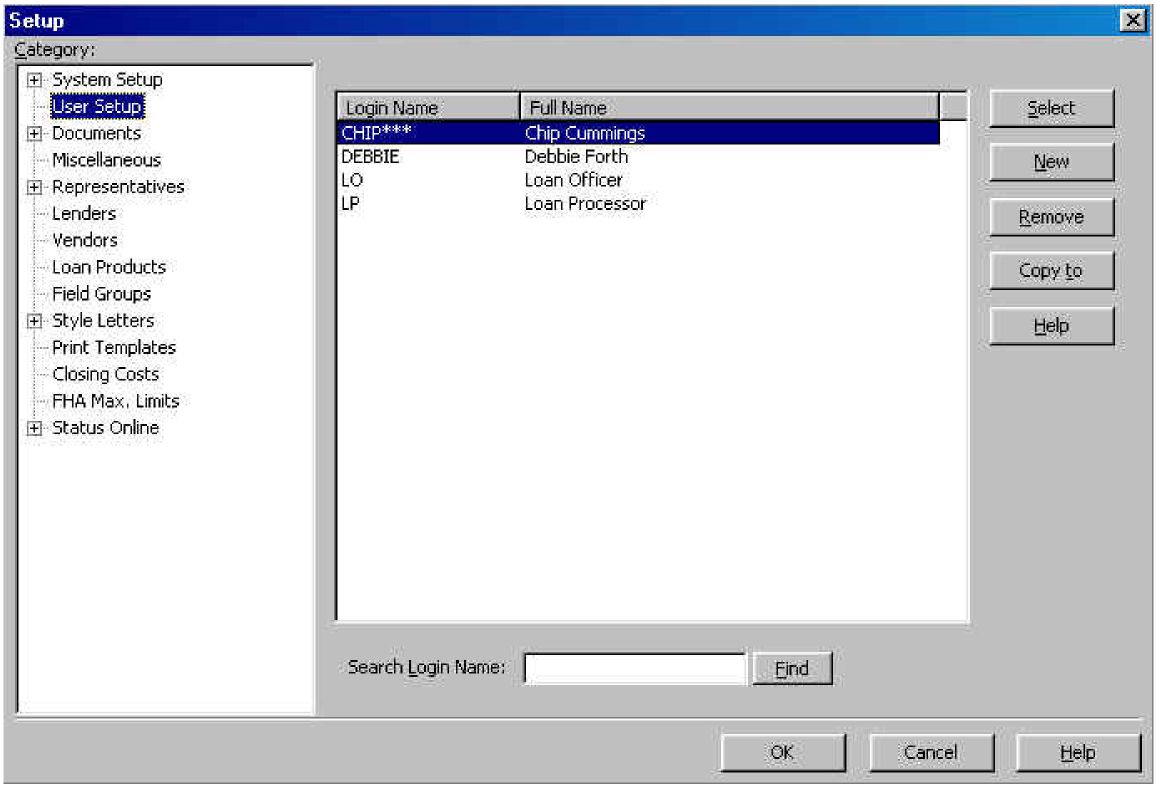
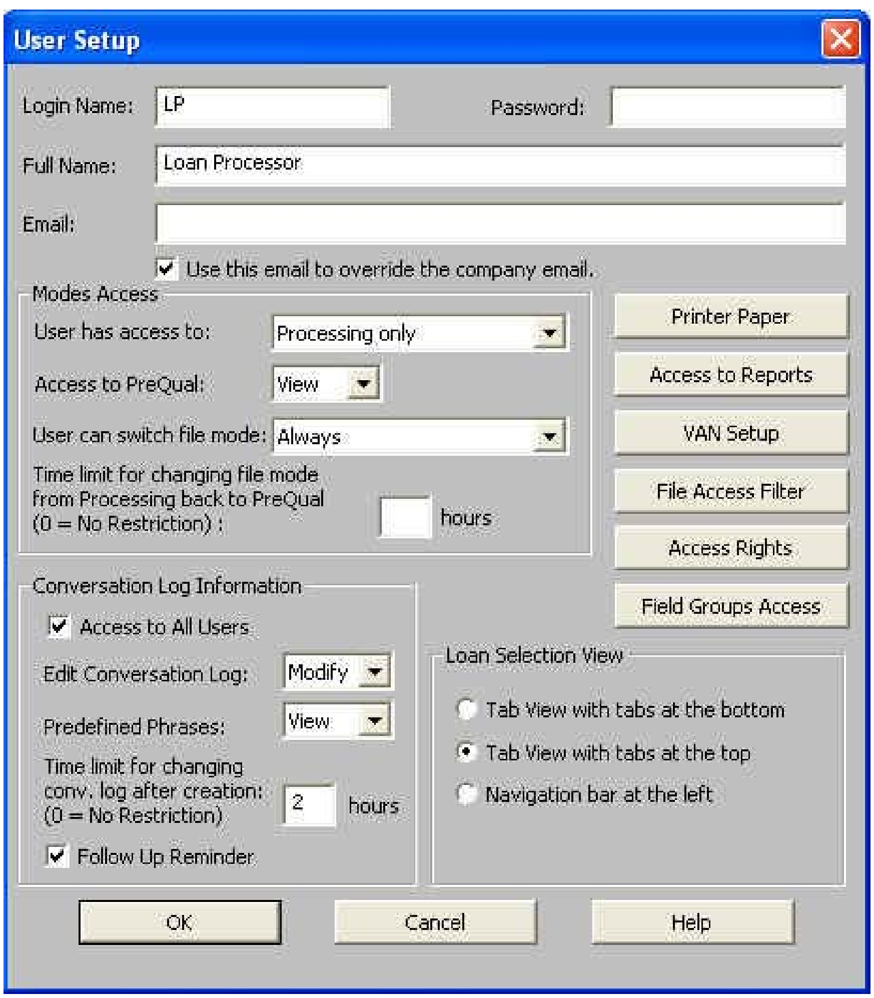
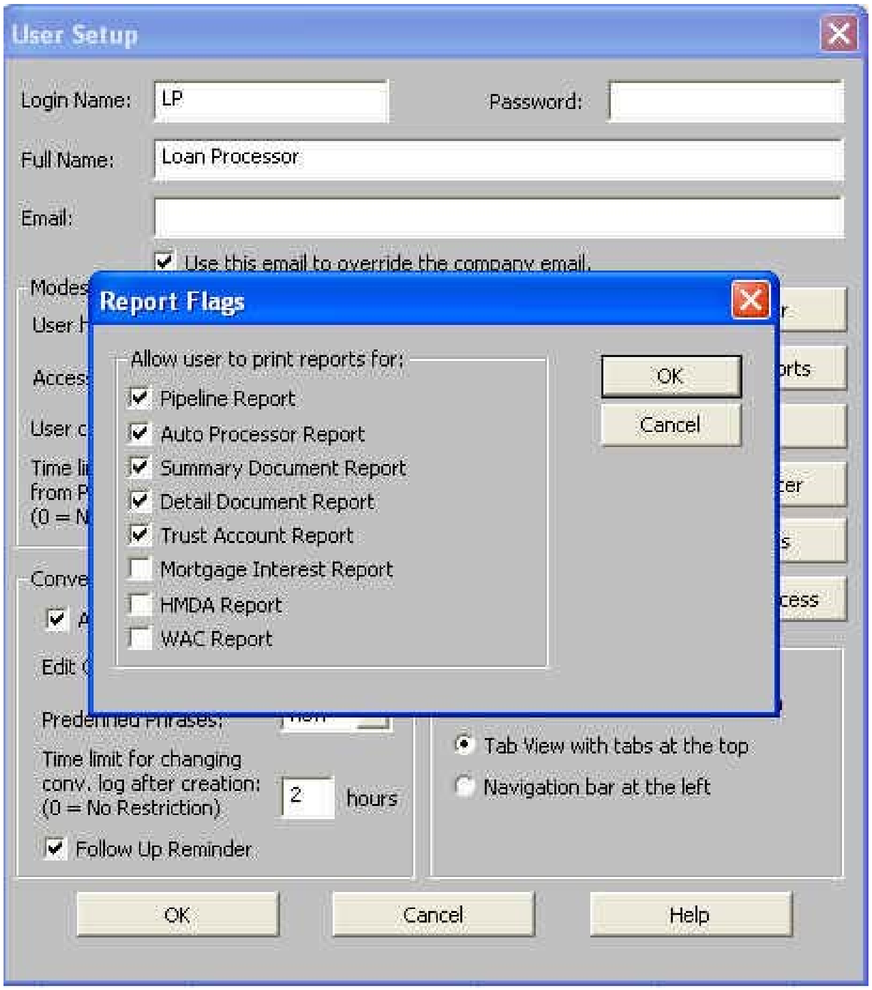
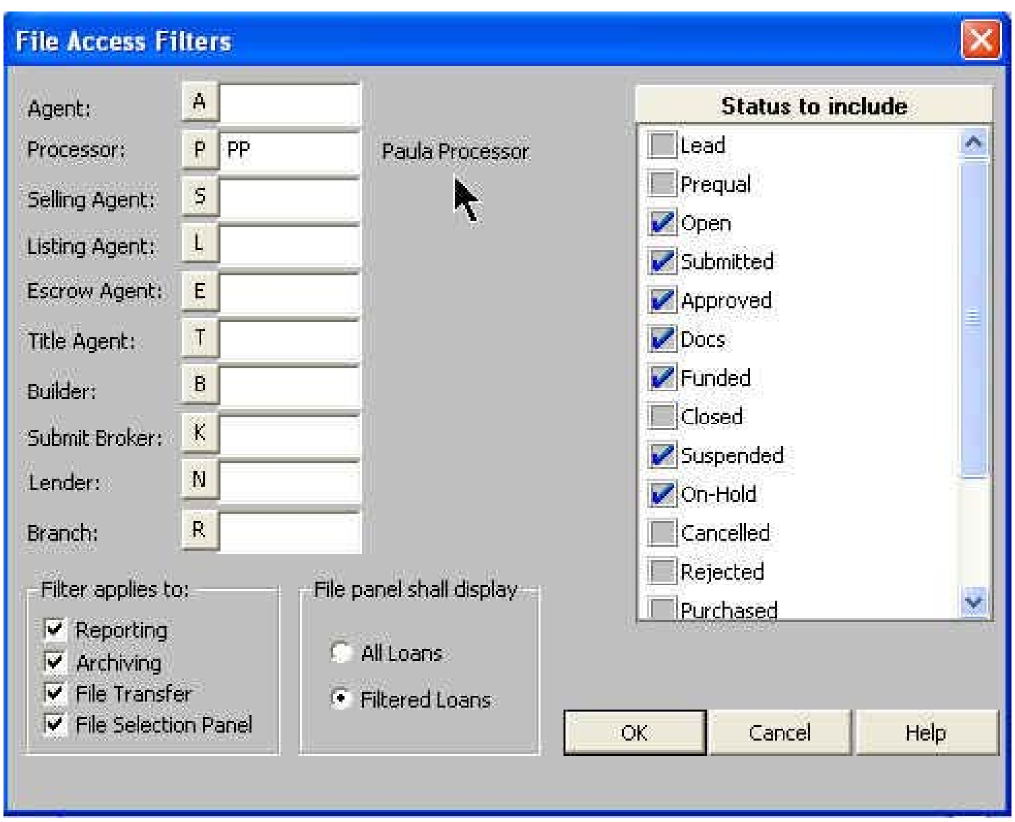
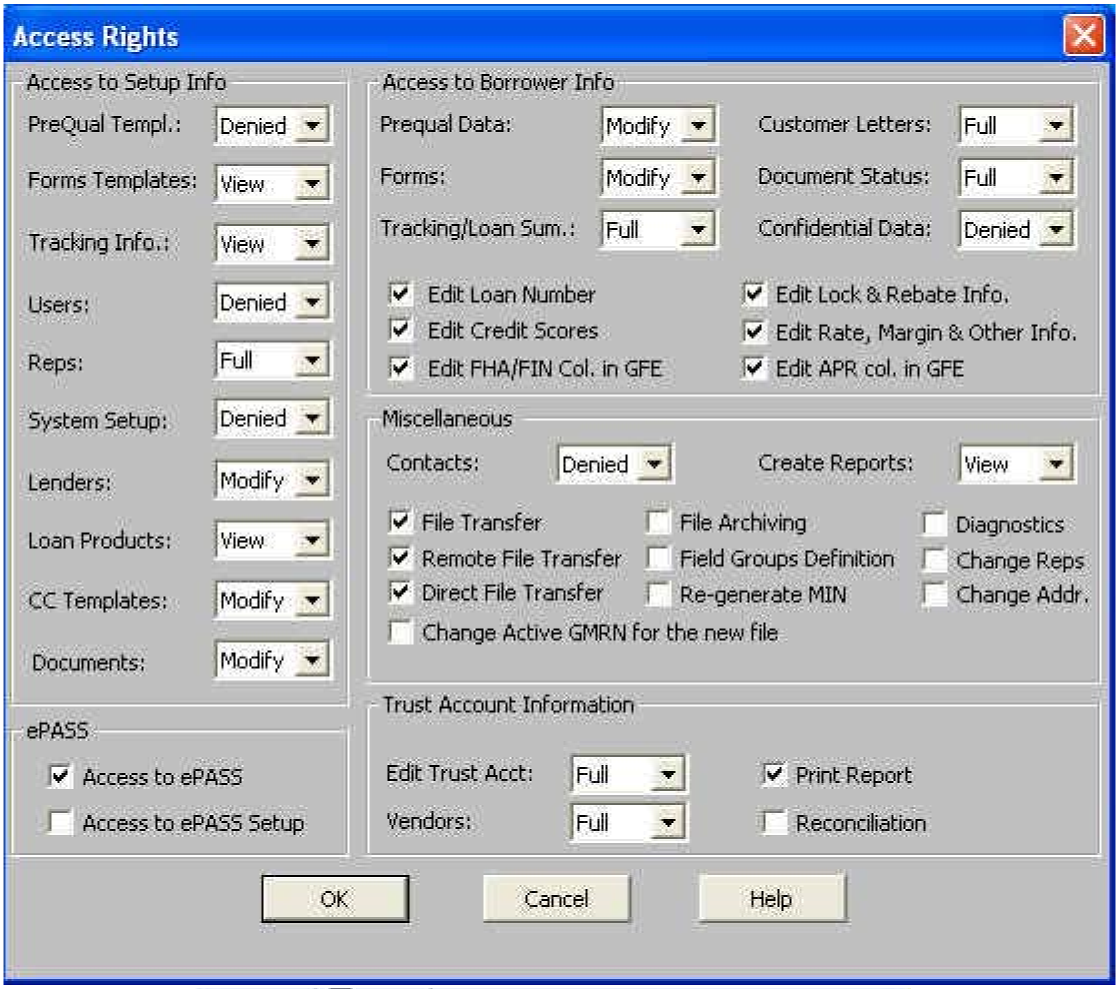


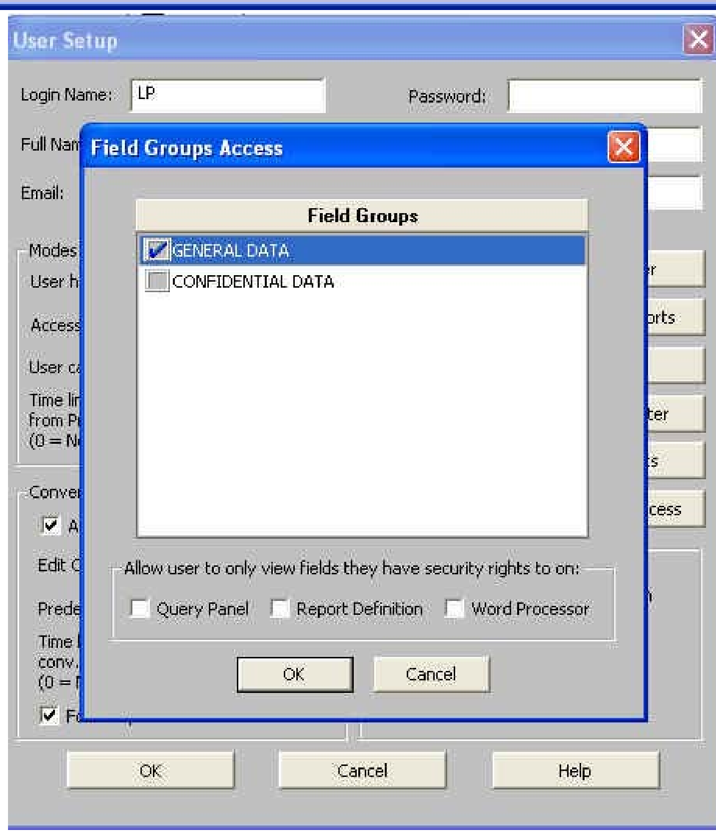

Setup
Category:
System Setup
User Setup
Documents
Miscellaneous
Representatives
Lenders
Vendors
Loan Products
Field Groups
Style Letters
Print Templates
Closing Costs
FHA Max. Limits
Status Online
Login Name
Full Name
CHIP***
Chip Cummings
DEBBIE
Debbie Forth
LO
Loan Officer
LP
Loan Processor
Select
New
Remove
Copy to
Help
Search Login Name:
Find
OK
Cancel
Help


User Setup
Login Name:
LP
Password:
Full Name:
Loan Processor
Email:
Use this email to override the company email.
Modes Access
User has access to:
Processing only
Access to PreQual:
View
User can switch file mode:
Always
Time limit for changing file mode from Processing back to PreQual (0 = No Restriction) :
hours
Printer Paper
Access to Reports
VAN Setup
File Access Filter
Access Rights
Field Groups Access
Conversation Log Information
Access to All Users
Edit Conversation Log:
Modify
Predefined Phrases:
View
Time limit for changing conv. log after creation: (0 = No Restriction)
2
hours
Follow Up Reminder
Loan Selection View
Tab View with tabs at the bottom
Tab View with tabs at the top
Navigation bar at the left
OK
Cancel
Help


User Setup
Login Name:
LP
Password:
Full Name:
Loan Processor
Email:
Use this email to override the company email.
Report Flags
Allow user to print reports for:
Pipeline Report
Auto Processor Report
Summary Document Report
Detail Document Report
Trust Account Report
Mortgage Interest Report
HMDA Report
WAC Report
OK
Cancel
Tab View with tabs at the top
Navigation bar at the left
Time limit for changing conv. log after creation: (0 = No Restriction)
2
hours
Follow Up Reminder
OK
Cancel
Help


File Access Filters
Agent:
A
Processor:
P
PP
Paula Processor
Selling Agent:
S
Listing Agent:
L
Escrow Agent:
E
Title Agent:
T
Builder:
B
Submit Broker:
K
Lender:
N
Branch:
R
Status to include
Lead
Prequal
Open
Submitted
Approved
Docs
Funded
Closed
Suspended
On-Hold
Cancelled
Rejected
Purchased
Filter applies to:
Reporting
Archiving
File Transfer
File Selection Panel
File panel shall display
All Loans
Filtered Loans
OK
Cancel
Help


Access Rights
Access to Setup Info
PreQual Templ.: Denied
Forms Templates: View
Tracking Info.: View
Users: Denied
Reps: Full
System Setup: Denied
Lenders: Modify
Loan Products: View
CC Templates: Modify
Documents: Modify
Access to Borrower Info
Prequal Data: Modify
Forms: Modify
Tracking/Loan Sum.: Full
Customer Letters: Full
Document Status: Full
Confidential Data: Denied
Edit Loan Number
Edit Credit Scores
Edit FHA/FIN Col. in GFE
Edit Lock & Rebate Info.
Edit Rate, Margin & Other Info.
Edit APR col. in GFE
Miscellaneous
Contacts: Denied
Create Reports: View
File Transfer
Remote File Transfer
Direct File Transfer
Change Active GMRN for the new file
File Archiving
Field Groups Definition
Re-generate MIN
Diagnostics
Change Reps
Change Addr.
ePASS
Access to ePASS
Access to ePASS Setup
Trust Account Information
Edit Trust Acct: Full
Vendors: Full
Print Report
Reconciliation
OK
Cancel
Help


User Setup
Login Name: LP
Password:
Email:
Field Groups Access
Field Groups
GENERAL DATA
CONFIDENTIAL DATA
Allow user to only view fields they have security rights to on:
Query Panel
Report Definition
Word Processor
OK
Cancel
OK
Cancel
Help

Genesis Short Cut Keys

For Help on a Specific Field:
Click on the field, and then press **SHIFT +F1** keys. Genesis will give you a description on the use of the field and/or tips on what to input. If the data originated from someplace else in Genesis, it will also tell you where that data is pulling from.

For General Help on the Screen:
Press the **F1** key. Genesis will give you an overview of the Subject and the screen you are currently working on.

To search for Help on a Topic:
You can research help topics by selecting **Index** from the **Help** menu where you will see hyperlinks to related subjects. Once in the help index, you can search for specific topics using the search feature.

Selecting Buttons and Accessing the Menu bar
When possible, Genesis 2000 provides shortcuts to select buttons on the screen. Some are self explanatory, such as the **F10** Save & Exit button. Others will have a character underlined. These will be selected when the Alt key is held down and the character is typed, e.g. **Alt+Z** to calculate the Truth-In-Lending form while in the Reg-Z screen.

Every large button displayed has a corresponding menu item that will also select the feature. For instance, you could click on the Open Loan button, or you could bring down the Loan Menu using **Alt+L**, and then press the letter **O** to select Open Loan.

Moving to the Top or Bottom of a Form
When entering information in a form you can quickly jump to the top of the form by holding down the **CTRL** key and pressing the **Home** key (**Ctrl+Home**). Similarly, you can move to the bottom of the form with **Ctrl+End**. To move one screen up or down the form, you can use the **PgUp** or **PgDwn** keys.

Accessing Utilities
Depending on the type of field you are in, you can use these shortcuts:

SHORTCUT	LOADS	WHERE YOU MUST BE:
Shift + F5	Calculator	Numerical Fields only
Shift + F8	Calendar	Date Fields only
Shift + F6	Conversation Log	Anywhere

Closing a Form Menu
To close a form window that is in the foreground, hold down the **Ctrl key** and press the **F4** key (**Ctrl+F4**).

Re-sizing a Form Window
To change the size or close a Form Window, use **Alt + -** (minus sign). Hold down the **Alt** key and press the minus (**-**) key. This will bring down a menu in the upper left hand corner of the window providing options such as Restore, Maximize, Minimize, Move, Size, Close and Next. Note: You can setup your system so that by default, a form will open in Maximized mode. From Utility, Change Setup, select Miscellaneous.

Exiting Genesis 2000 for Windows
To exit Genesis 2000 for Windows, hold down the **Alt** key and press the **F4** key (**Alt+F4**). You will be prompted with Save options if any data has been entered and not saved yet.

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Genesis Keyboard Shortcuts

KEY	COMBINATION	ACTION
Enter & TAB Key		Will move you to next field in a form, or to a button in a dialog. Enter may also be used to execute an OK or Select button (just like double clicking with mouse).
Escape Key		Will cancel (or close) a dialog box.
Alt Key	Alt -	(Alt/Minus sign) will bring down the Windows system menu so that the current window can be re-sized Maximize-Make window full screen Minimize-Make window shrink to icon Restore-Restores a maximized Window to original size
	Alt+Enter	Will toggle a DOS Window to Full Screen or Full Screen to DOS Window.
	Alt+TAB	Will bring up a menu of open programs and allow you to cycle through them.
	Alt+D	Will insert Today's Date into a date field (then ”+” to add, or “-“ to subtract days
	Alt+F10	Will turn off Search for Multiple Borrowers
Ctrl Key	Ctrl+Home	Takes you to the very top of a form
	Ctrl+End	Takes you to the very bottom of a form.
	Ctrl+C	Copy highlighted text into field or document
	Ctrl+M	Change File Mode (Pre-qual / Processing)
	Ctrl+X	Cut highlighted text into field or document
	Ctrl+V	Paste Cut or Copied text into field or document
	Ctrl+Arrow	While in a field, will move one word over
Shift Key	Shift+F5	Brings up the Genesis 2000 Calculator
	Shift+F8	Brings up the Genesis 2000 Calendar
	Shift+F6	Opens the Conversation Log
Insert Key		Insert new file (Main Panel Screen)
Delete Key		Delete File or entry
Home Key		While in a field, will move cursor to beginning of entry
End Key		While in a field, will move cursor to end of entry
PageUp Key		Move one screen up while in a form.
PageDn Key		Move one screen down while in a form.
Spacebar		Use to bring down ComboBox menu selections.
F1	F1 Shift + F1	Brings up help information for that form/area. Tells you where that entry data is pulling from.
F2	F2	From File Selection Panel, will bring up File Summary Screen. Inside Loan File – rolodex; drop-down; or go to another section within loan file
F3		Re-order File Selection Panel
F5		Copy File
F7	 Alt + F7 Ctl + F7	Search for file information - address, city, etc. Continue search for next matching entry Go to previous matching entry
F8		Prints the current form you are working on
F9		Search for names of multiple borrowers *(ALT+F10 to turn off)*
F10		Save and Exit