



Impact Online

Version 3.00

User Manual Addendum
for Internal Users

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Introduction

Impact Online v3.0 is the latest release for use with the Impact/SQL Title and Escrow software suite. Impact Online is a web-based application that allows clients to open orders and to view critical escrow file information, including documents and escrow status, from anywhere, through the convenience of a web browser. Additionally, Impact Online allows external clients to enter new orders via the web. The application is directly integrated with the Impact/SQL Title and Escrow software suite, so all information shown is up-to-date. Impact Online v3.0 requires the Impact/SQL database to be on version 7.0 or higher. Impact Online is compatible with Internet Explorer 6.0.

This manual, Impact Online V 3.00 – User Manual Addendum for Internal Users, provides information on the tasks only available to internal users, in support of activity initiated by external users: **approving orders** and **approving the posting of documents**.


The rights to approve orders &/or approve documents are granted to the user by the System Administrator.

The Impact Online site can be configured to limit users with the right to approve orders &/or documents to see and approve (or reject) orders &/or documents *relating to their branch only*, unless the user is assigned to branch 099 (Title) or branch 999 (Accounting) OR to allow users with the right to approve orders &/or documents to see and approve (or reject) orders &/or documents *related to any branch*.

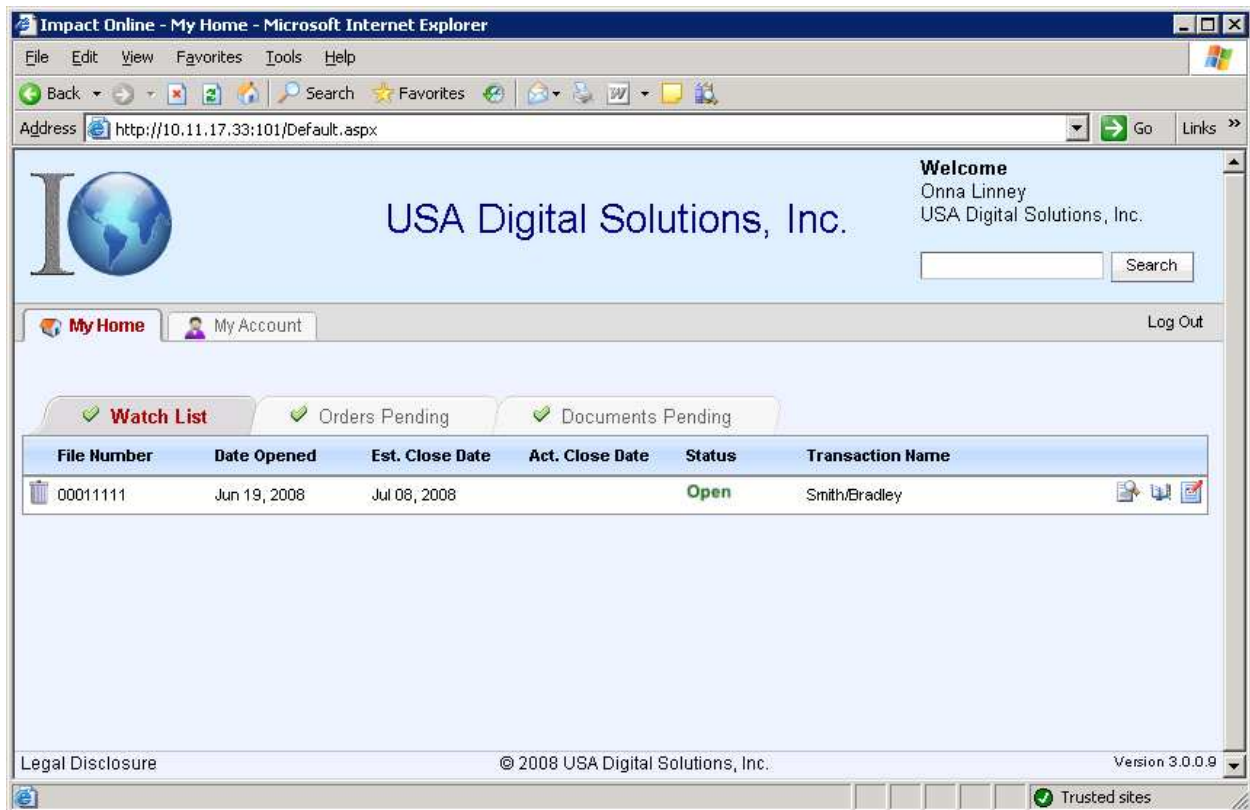
The External User's Manual should be referenced for all other user functionality, and the Site and User Administration manual should be referenced for those functions.

Approving/Denying Orders

The Impact Online system can be configured to automatically approve all orders entered by your clients, or to require an approval of the order by an internal user before a file number is assigned and the data is entered into Impact/SQL. The following steps will outline what the internal user needs to do to approve orders, if the system is so configured. These instructions assume the user is configured as an internal user linked to a branch in the related Impact/SQL database, and that the user has been granted the rights to approve orders.

Once logged into Impact Online, you will be presented with a display like that below, with **My Home** and **My Account** top level tabs and with **Watch List**, **Orders Pending** and **Documents Pending** tabs, under the My Home tab, with the Watch List tab selected. There will be a check mark icon  on those tabs that have items on them.

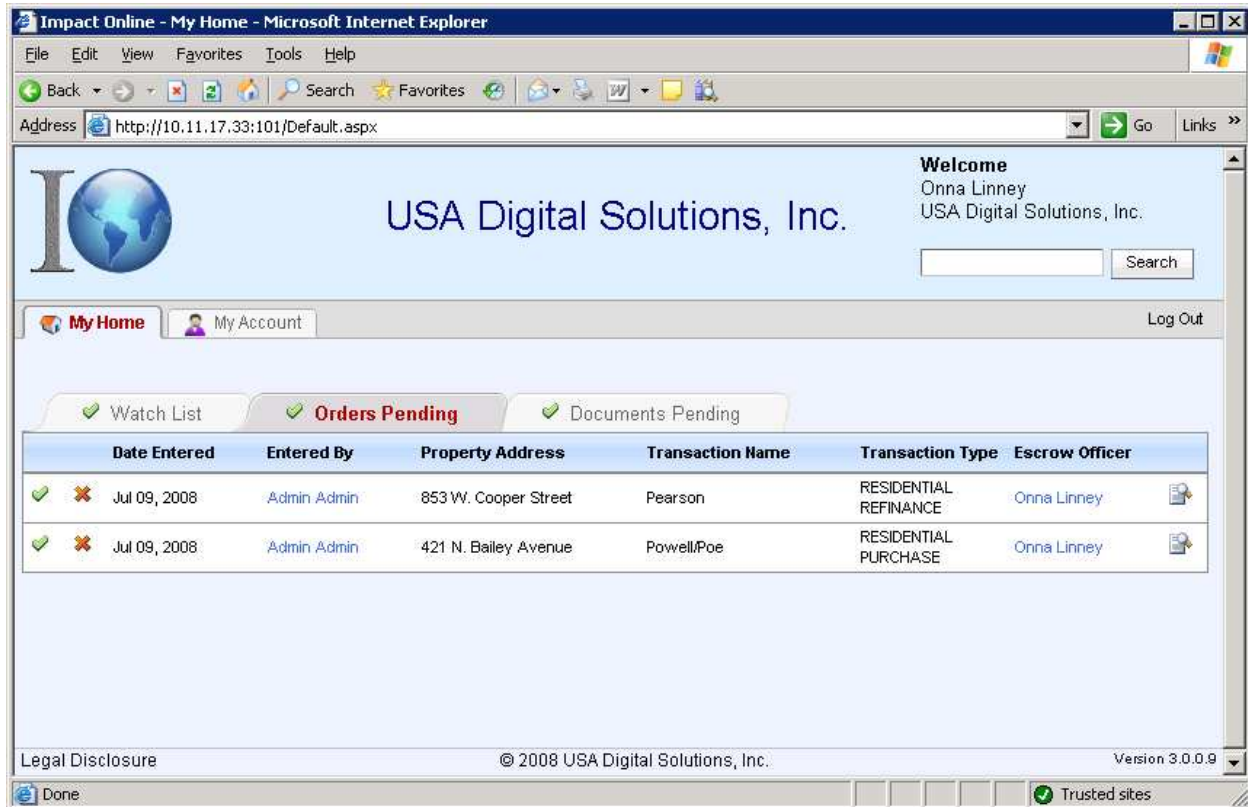
NOTE: if you have been in your session for some time, and there is a lot of file ordering or document uploading being done by your external users, click on the Internet Explorer refresh button (the page with the two curved green arrows) to trigger a re-check of the system for new pending orders or pending documents.



The Watch List tab's functionality is explained in the [External User's Manual](#), and so will not be re-explained here.

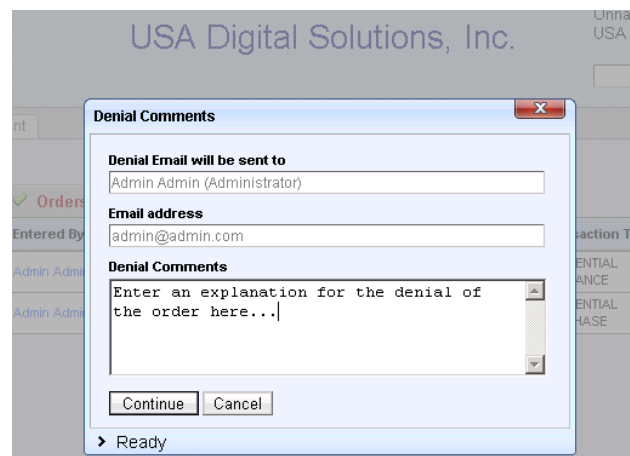
Click on the **Orders Pending** tab, if there is a green check mark by the tab name, indicating there are orders to be reviewed, so you can work the orders.


The **Orders Pending** tab, when populated, will display a limited set of information about orders that are pending approval for your branch (or all branches if you are assigned to Br. 099 or 999, or if the system is configured to not limit approvals to one branch). The fields presented are **Date Entered**, **Entered By** (the external user), **Property Address** (line 1 only), **Transaction Name** (Buyer/Seller), **Transaction Type** and **Escrow Officer** selected.

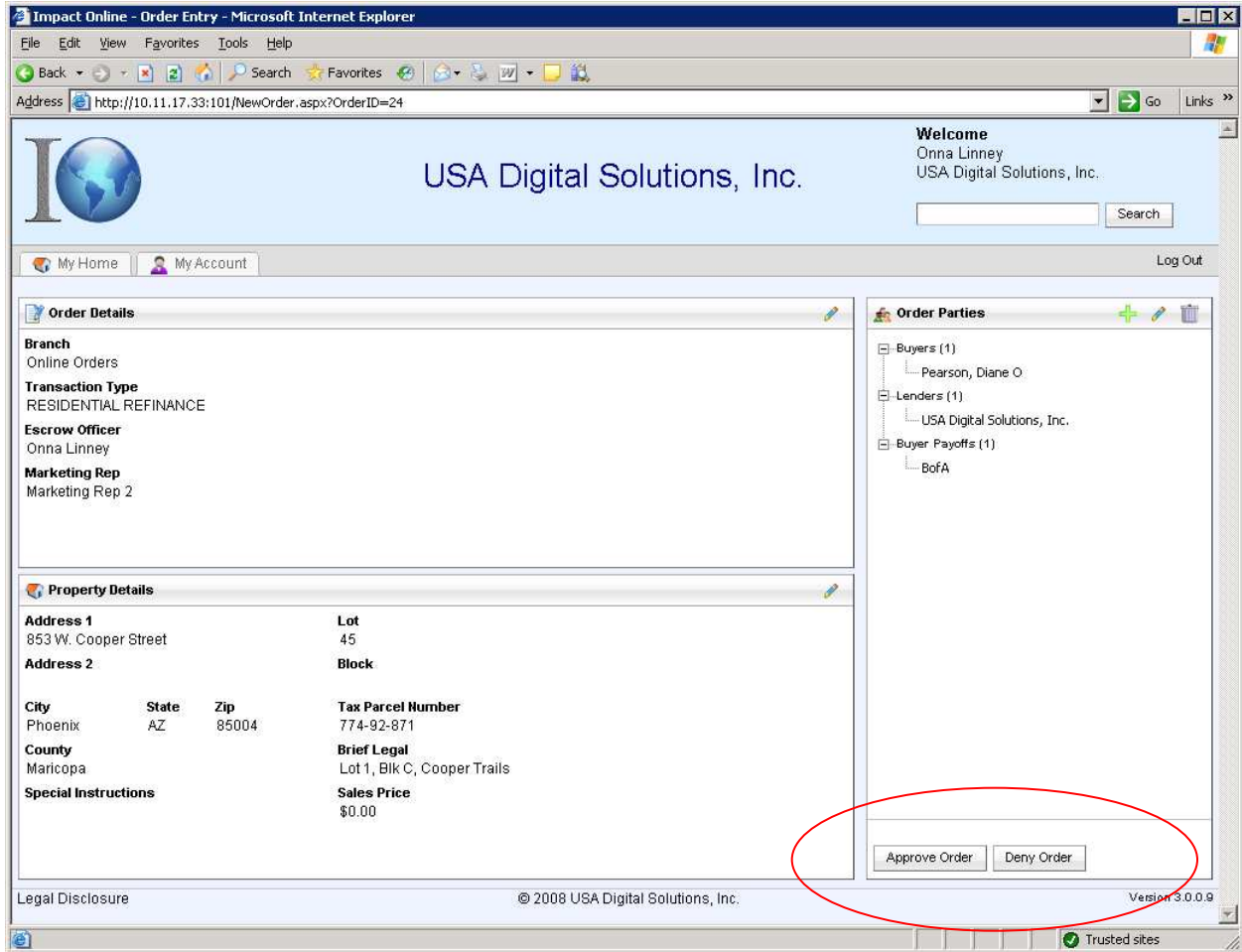


There are two icons to the left of each order:

- ✔ This icon is used to **Approve the pending order**. This icon should be clicked on only after reviewing the detail on the order and assuring yourself that the order information is entered properly. You may also wish to try to confirm that the order is not a duplicate order. *There is no "second chance" on this icon...once clicked, the order will be created within Impact/SQL and an e-mail will be sent to the Entered By party with that information.*
- ✘ This icon is used to **Deny the pending order**. After reviewing the order you may determine it is a duplicate or may wish to decline it for some other reason. Once clicked on, a window will be presented asking for the reason for the denial. Enter the reason and click on **Continue** or **Cancel** to send the denial or return to the Orders Pending tab, without denying the order.



On the right side of each order there is an icon used to preview the order . Clicking on this icon will take you to the same screens used to enter the order (described in detail in the External User's Manual) and the Order Entry Wizard will start up. Once you have reviewed the order detail, and exited out of the wizard, the order information screen will present with the three sections of **Order Details**, **Property Details** and **Order Parties**.



In the lower right corner, are buttons labeled **Approve Order** and **Deny Order**. These will trigger the same action as the icons for those actions, in the front of each order, on the Orders Pending tab.



To move away from this screen, without taking either action, click on the **My Home** tab, and you will be returned to that tab, with the Watch List sub-tab presented.

Approving/Removing Documents

Click on the **Documents Pending** tab, if there is a green check mark by the tab name, indicating there are uploaded documents to be reviewed, so you can determine if the documents should be approved or removed. In the sample below, there are four documents, for file #00011111. Information about each is contained in the **File Number**, **Document Type**, **Description**, **Document Name**, **Published Date** and **Uploaded By** fields.

File Number	Document Type	Description	Document Name	Published Date	Uploaded By
00011111	ESCROW INSTRUCTIONS	Escrow Instructions	1-Escrow Instructions.pdf	Jul 11, 2008	Administrator
00011111	DOCUMENTS	HOA Demand request	1-HOA Demand req.pdf	Jul 11, 2008	Administrator
00011111	DOCUMENTS	Payoff request	1-Payoff Req.pdf	Jul 11, 2008	Administrator
00011111	DOCUMENTS	Affidavit	1-Affidavit.pdf	Jul 11, 2008	Administrator

There are two icons to the left of each document listed:

-  This icon is used to **Approve the pending document**. This icon should be clicked on only after reviewing the document and assuring yourself that it should be made a part of the record for the file related to it AND you have set the Security Options on the document (see **Document Approval Review** on the next page). *There is no "second chance" on this icon...once clicked, the document will be made available for viewing within Impact Online. A message "Document Approved Successfully will be presented.*
-  This icon is used to **Remove the pending document**. After reviewing the document you may determine it should be declined for some reason. Once the icon is clicked on, a window will be presented asking for the reason for the denial. Enter the reason and click on **Continue** or **Cancel** to send the denial or return to the Documents Pending tab, without removing the document.

Denial Comments

Denial Email will be sent to
Admin Admin (Administrator)

Email address
admin@admin.com

Denial Comments
Enter an explanation for the denial of the document's posting here...

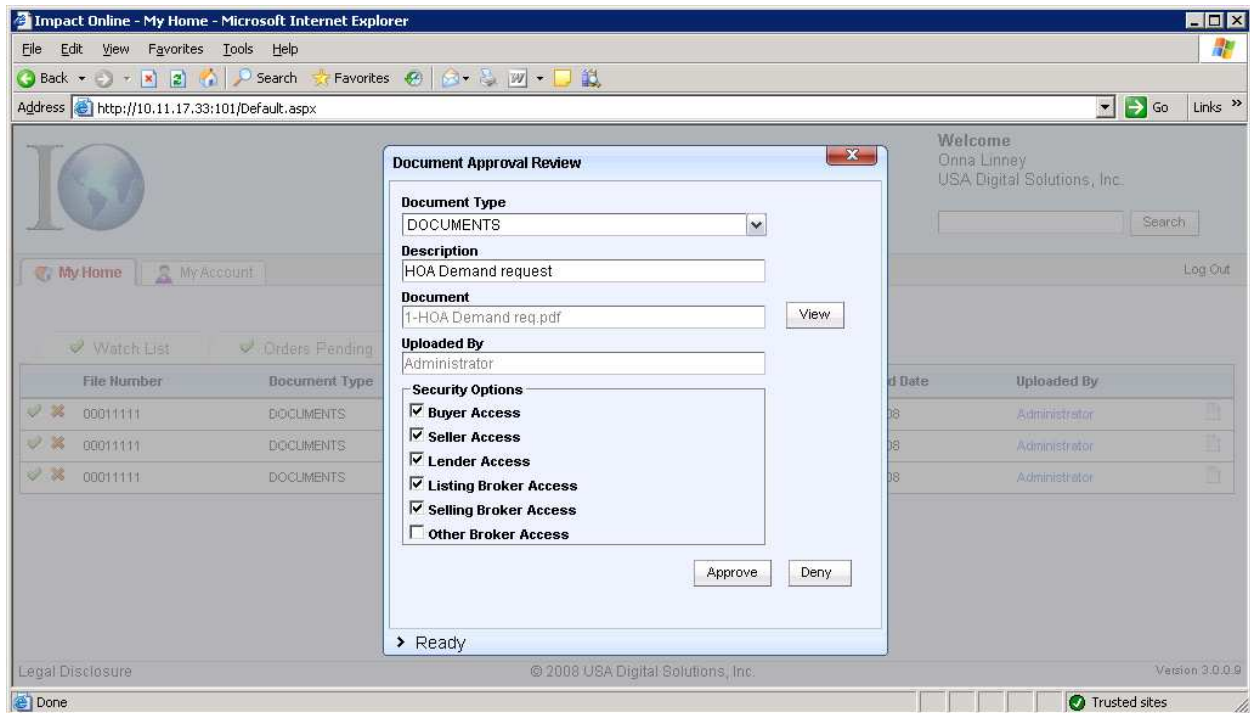
Continue Cancel

Ready

There is an icon on the right side of each document listed that will open a **Document Approval Review** window. On this window, presented below, the **Document Type** can be adjusted (the types are a function of the Escrow Document Menu headings in the related Impact/SQL database), and you can determine which party(ies) to the file should have access to view the document within Impact Online – by selecting the appropriate party(ies) in the **Security Options** box.

Click on the **View** button (right side) to view the document.

Click on the **Approve** or **Deny** button for the desired action.



Other Documentation

Detailed instructions for Impact Online external users is provided in the [Impact Online version 3.00 External User's Manual](#).

Detailed instructions for Impact Online site and user administration is provided in the [Impact Online version 3.00 Site and User Administration](#) guide.

Support

Please contact USA Digital Solutions, Inc. at (602) 866-8199 x 2 or by email at Support@Digisolaz.com for support issues.

