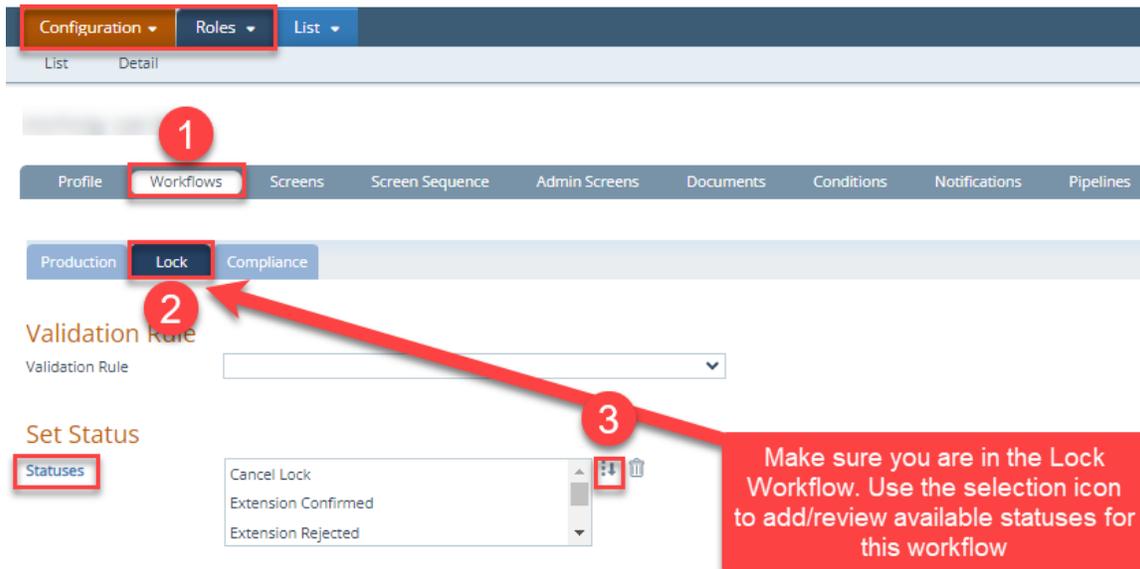


Configuring the Purchase Advice Screen

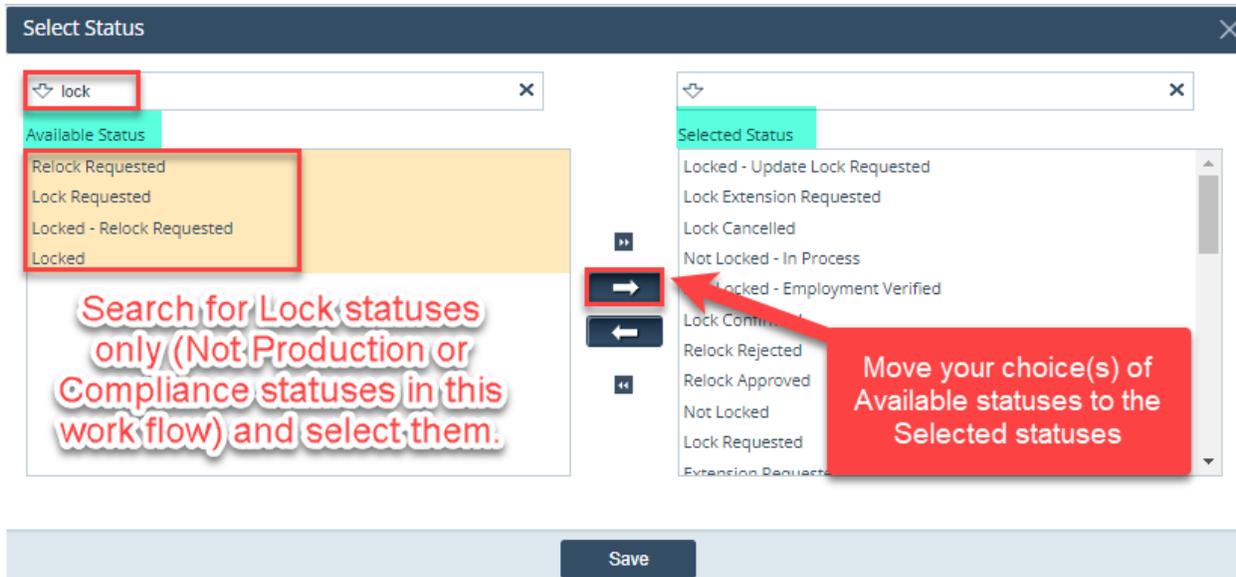
1. As the system administrator, go to **Configurations > Roles** and select the role that will have access to the **Purchase Advice** screen.
2. After selecting the role, go to **Workflows > Lock**.



The screenshot shows the configuration interface with the following elements:

- 1**: A red box highlights the **Roles** dropdown menu in the top navigation bar.
- 2**: A red box highlights the **Workflows** tab in the sub-navigation bar.
- 3**: A red box highlights the **Lock** tab in the sub-sub-navigation bar.
- A red arrow points from the **3** box to a select icon (three vertical lines with a downward arrow) next to the **Set Status** field.
- A red callout box contains the text: "Make sure you are in the Lock Workflow. Use the selection icon to add/review available statuses for this workflow".

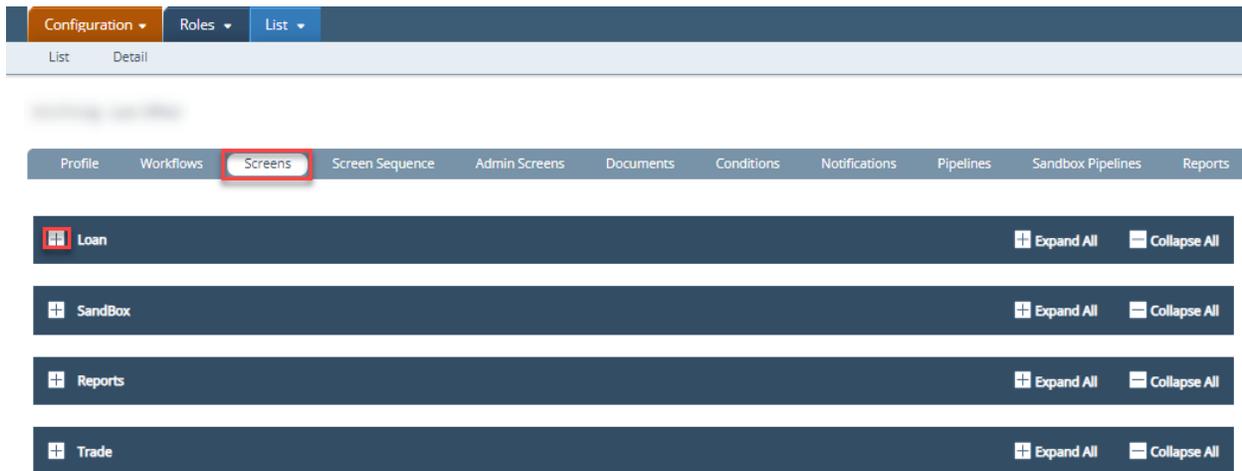
3. Click the select icon (⋮↓) to open the **Select Status** lightbox, where you can select the statuses to be available for this role.
4. Move the statuses over to the right side in the **Selected Status** field. This will be the list of available statuses when configuring each screen. If a role has these statuses added to any screen, that role (users who have that role) will have access to edit the screen.



The screenshot shows the **Select Status** lightbox with the following elements:

- lock**: The role name is displayed in the top left of the lightbox.
- Available Status**: A list of statuses on the left side, including "Relock Requested", "Lock Requested", "Locked - Relock Requested", and "Locked". A red box highlights this list.
- Selected Status**: A list of statuses on the right side, including "Locked - Update Lock Requested", "Lock Extension Requested", "Lock Cancelled", "Not Locked - In Process", "Locked - Employment Verified", "Relock Rejected", "Relock Approved", "Not Locked", "Lock Requested", and "Extension Requested".
- Navigation**: A red box highlights the right-pointing arrow button used to move statuses from the Available list to the Selected list.
- Callouts**:
 - A red callout box at the bottom left says: "Search for Lock statuses only (Not Production or Compliance statuses in this work flow) and select them."
 - A red callout box at the bottom right says: "Move your choice(s) of Available statuses to the Selected statuses".
- Save**: A "Save" button is located at the bottom center of the lightbox.

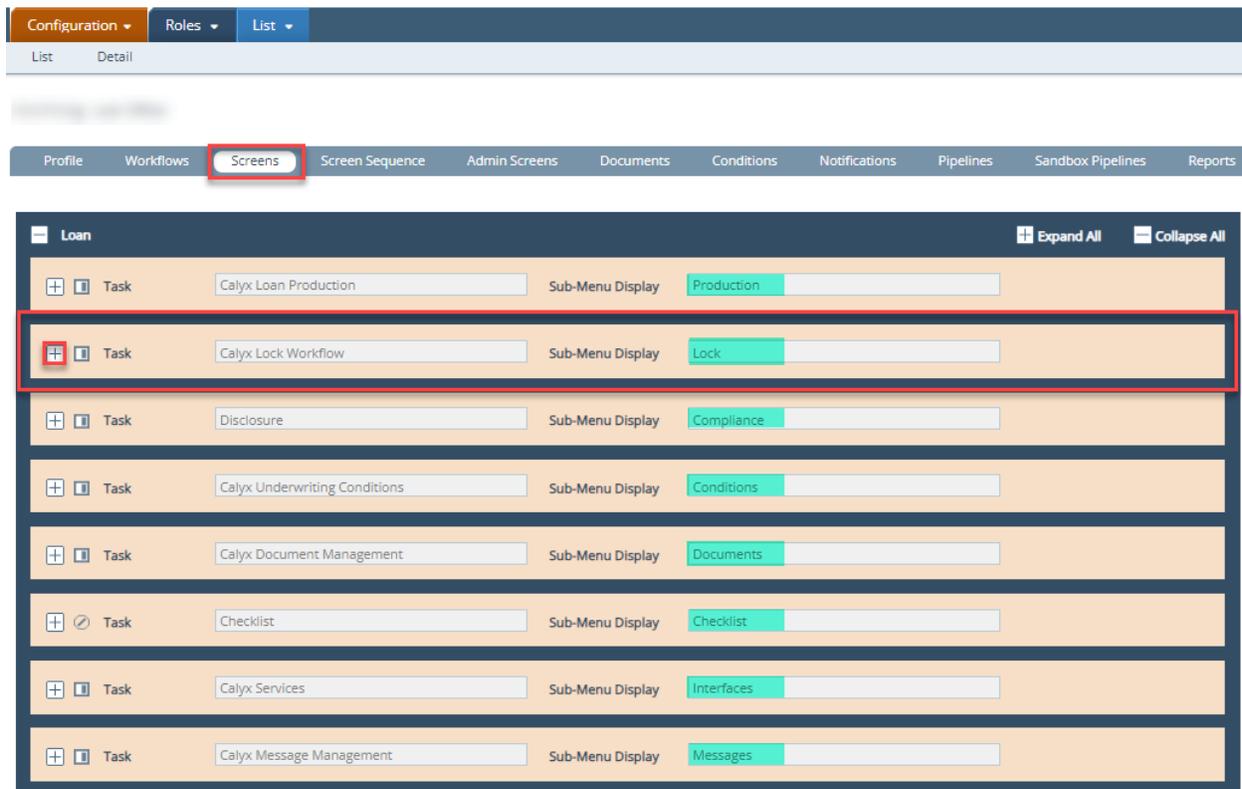
- Now you are ready to configure your screen. Go to the **Screens** tab and select the add icon (+) corresponding to Loans.



The screenshot shows the configuration interface with the following elements:

- Top navigation: Configuration, Roles, List
- Sub-navigation: Profile, Workflows, **Screens**, Screen Sequence, Admin Screens, Documents, Conditions, Notifications, Pipelines, Sandbox Pipelines, Reports
- Screen list: Loan, SandBox, Reports, Trade
- Each screen has an 'Add' icon (+) and 'Expand All' / 'Collapse All' buttons.

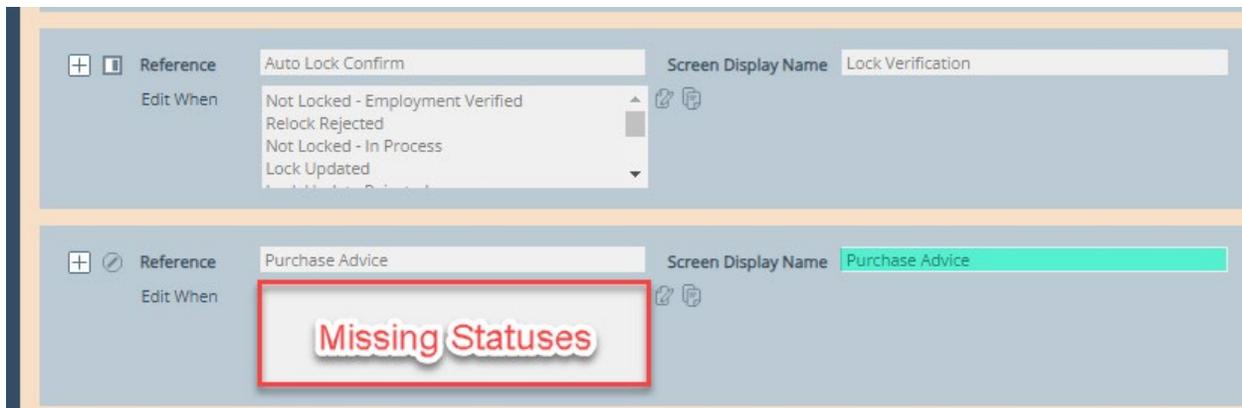
- Select + again for the corresponding section you would like to edit.



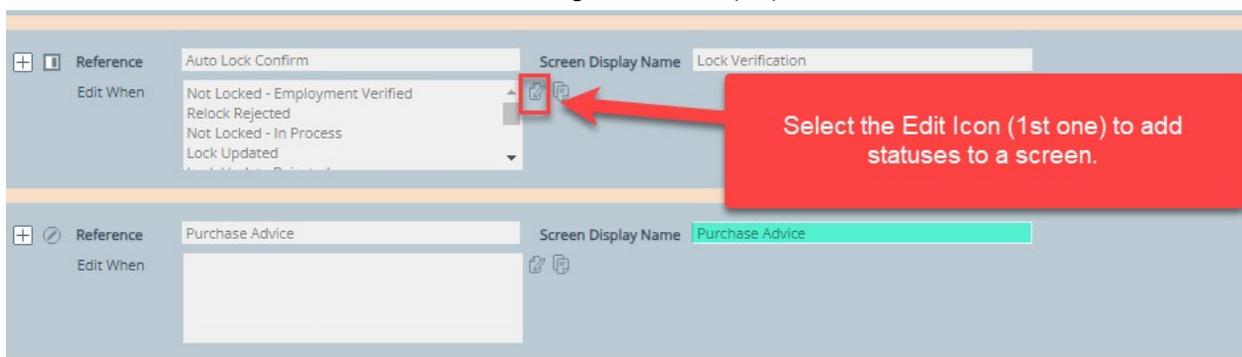
The screenshot shows the configuration interface with the following elements:

- Top navigation: Configuration, Roles, List
- Sub-navigation: Profile, Workflows, **Screens**, Screen Sequence, Admin Screens, Documents, Conditions, Notifications, Pipelines, Sandbox Pipelines, Reports
- Screen list: Loan, SandBox, Reports, Trade
- The 'Loan' screen is expanded, showing a list of tasks:
 - Task: Calyx Loan Production (Sub-Menu Display: Production)
 - Task: Calyx Lock Workflow (Sub-Menu Display: Lock)** - This row is highlighted with a red box.
 - Task: Disclosure (Sub-Menu Display: Compliance)
 - Task: Calyx Underwriting Conditions (Sub-Menu Display: Conditions)
 - Task: Calyx Document Management (Sub-Menu Display: Documents)
 - Task: Checklist (Sub-Menu Display: Checklist)
 - Task: Calyx Services (Sub-Menu Display: Interfaces)
 - Task: Calyx Message Management (Sub-Menu Display: Messages)

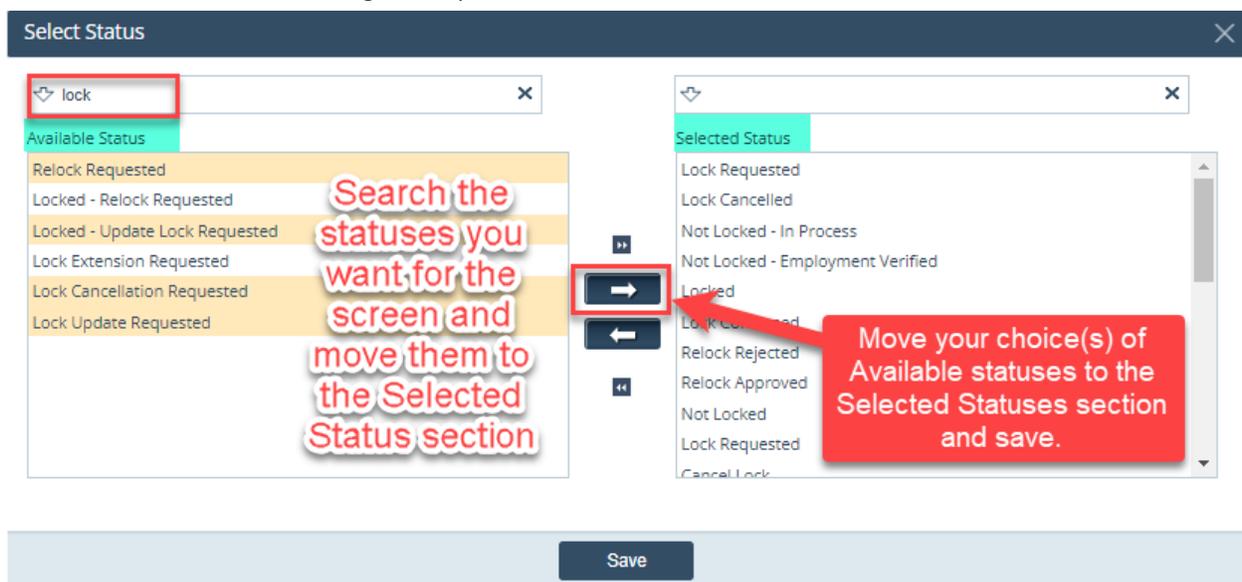
- When you first visit **Configurations > Roles > Screens > Lock > Purchase Advice**, there are no statuses added for the screen, as shown below.



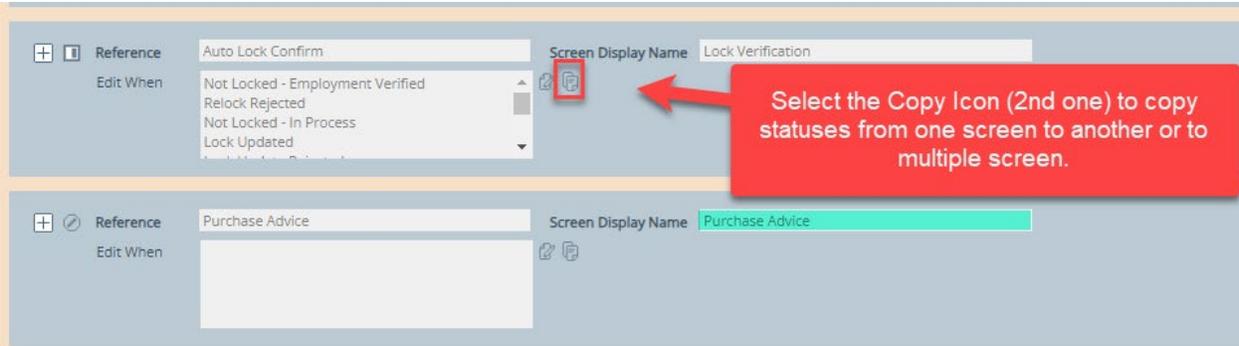
8. You need to add statuses to the screen using the edit icon (✎).



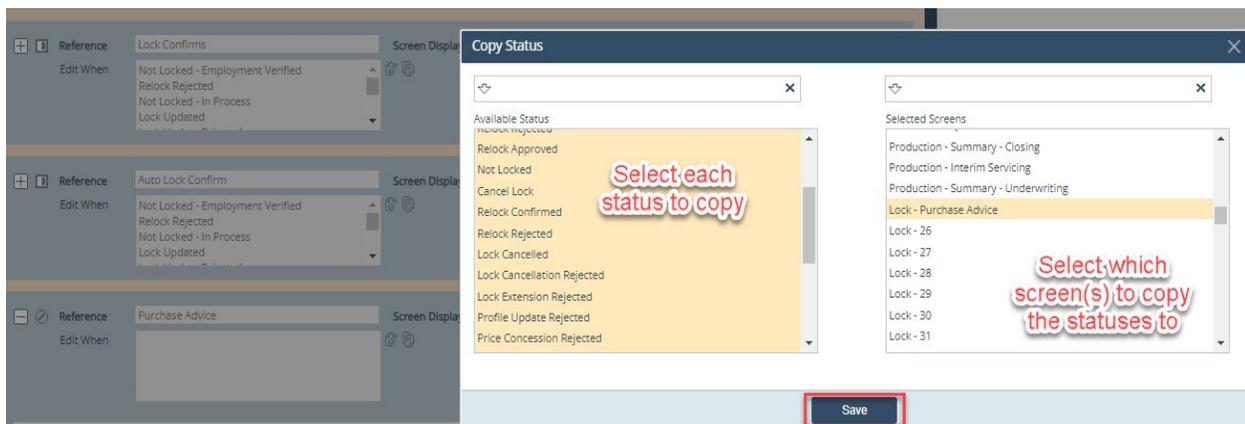
9. Then the **Select Status** lightbox opens.



10. Once statuses are added to a screen, you can use the copy icon (📄) to copy statuses from one screen to another or to multiple screens. In this scenario we are copying from the **Lock Verification** screen.



11. After selecting , the **Copy Status** lightbox opens, here you choose the status(es) to be copied to the screen.



12. Next, select the screen where these statuses are copied to, then click **Save**.

13. The screen has now been added to the lock workflow, but it is by default greyed out (read only) and missing action buttons, as shown below.

Loans ▾ | Summary | Request | Lock ▾ | Purchase Advice ▾

Send/Status | Summary | Request | Lock Verification | Confirm | Final Commitment | Pricing Review | Purchase Advice

Loan Information

Loan Type: Conventional ▾ | Subject Property: 10655 Birch St
 Term: 360 | Address: 10655 Birch St
 Note Rate: 9.000% | Unit Type: ▾
 Total Loan Amount: \$ 300,000.00 | Unit Number: ▾
 First Payment Date: ▾ | City: Burbank
 State: CA ▾ | ZIP: 91502-1234

Purchase Advice Detail

Sale Date: ▾ | Amount Purchased: \$
 Investor First Payment Date: ▾ | Per Diem Interest Basis: 360 ▾
 Date: ▾ | Per Diem Current Interest Rate: 9.000% ▾

Realized Sell Price

Loan Program: ▾ | Program Group: ▾

Base Price: ▾ + \$ ▾ = \$ ▾

Price Adjustments

Final Price: 0.00000000 | \$ 0.00

Interest

Interest	Starting Interest Date	Sale Date	Interest Days	Per Diem	Per Diem Total
Interest To Sale Date	▾	to ▾	▾	\$ 0.00	\$ 0.00

Escrows

Escrow Name	Charge	Total: \$
No records		0.00

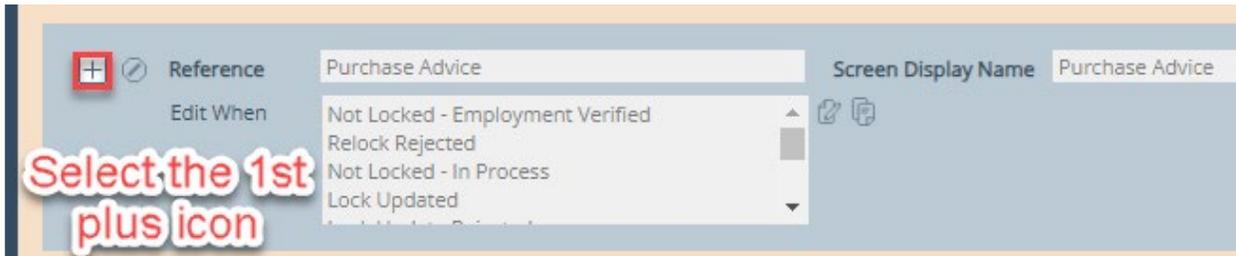
Fees

Total: \$
0.00

No Buttons showing.

14. Next you need to enable the buttons for the screen.

15. Select the corresponding .

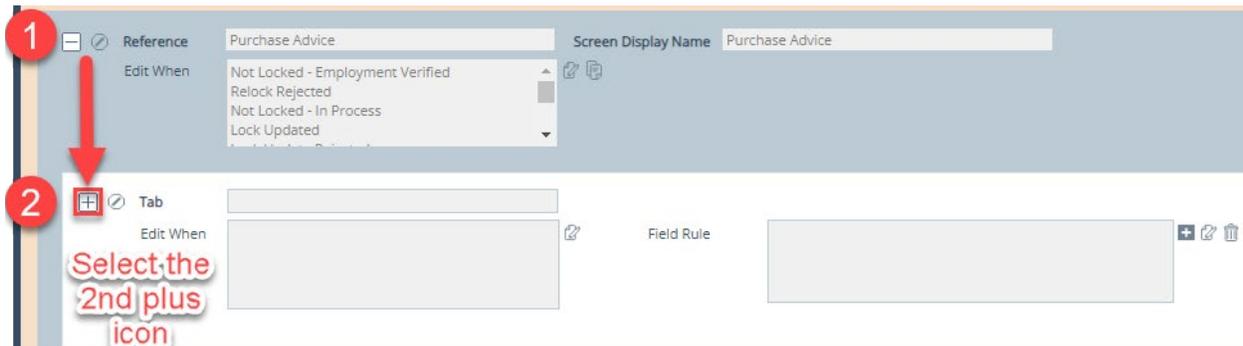


Reference: Purchase Advice | Screen Display Name: Purchase Advice

Edit When: Not Locked - Employment Verified, Relock Rejected, Not Locked - In Process, Lock Updated

Select the 1st plus icon

16. The select 2nd  to expand the screen fully.



1  Reference: Purchase Advice | Screen Display Name: Purchase Advice

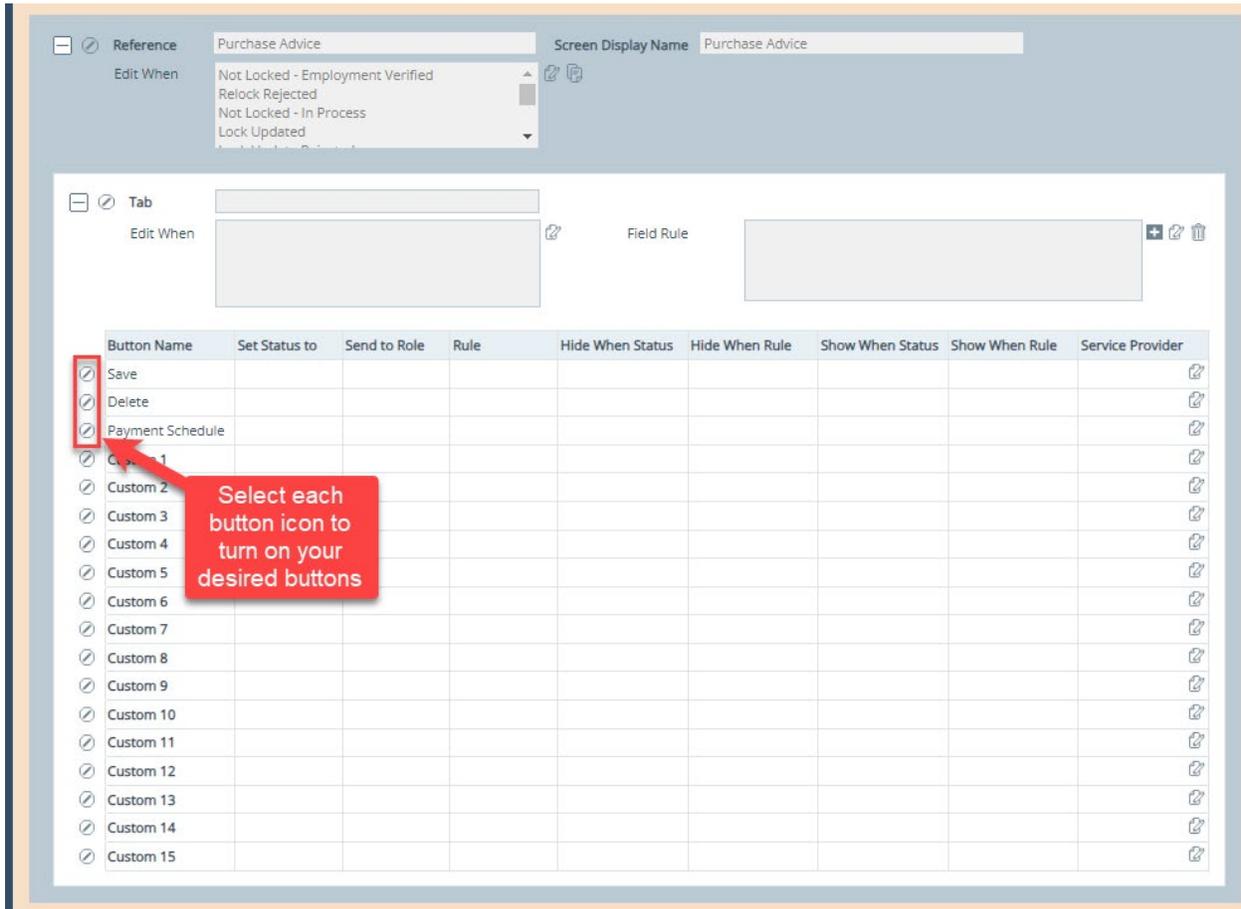
Edit When: Not Locked - Employment Verified, Relock Rejected, Not Locked - In Process, Lock Updated

2  Tab

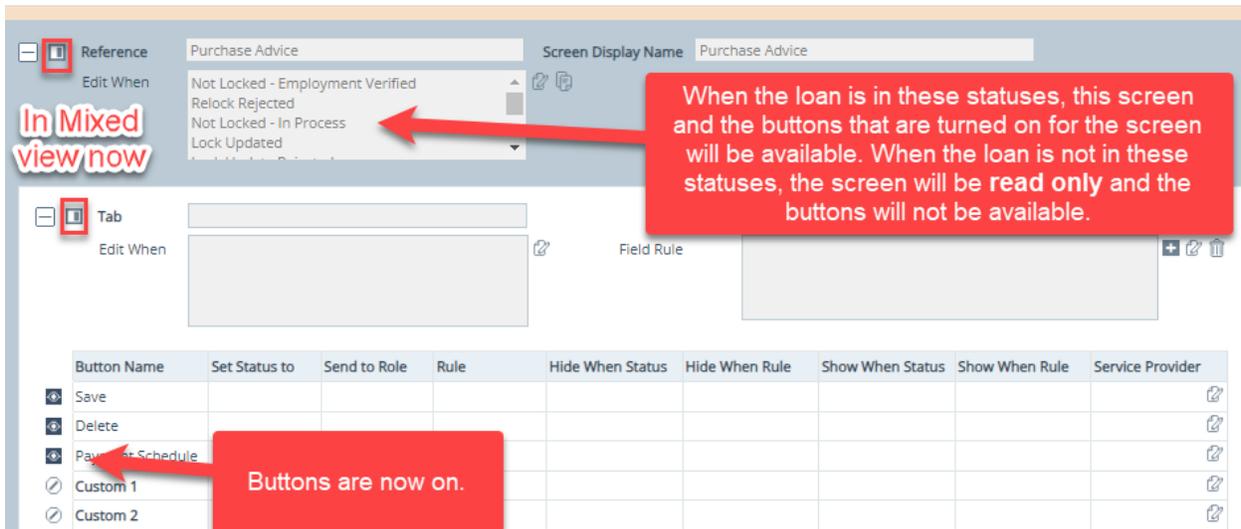
Edit When: | Field Rule: |  

Select the 2nd plus icon

17. Toggle the icon next to the corresponding button to be enabled for this screen. You can toggle between no access (🔒) and access (🔓).



18. The corresponding icon is 🔓, the button is enabled. Now that the buttons are enabled, the role will have access to the screen and buttons, if the added statuses are present. In all other cases, the screen will be read only, and the role won't be able to edit/add/delete on this screen.



In Mixed view now

When the loan is in these statuses, this screen and the buttons that are turned on for the screen will be available. When the loan is not in these statuses, the screen will be read only and the buttons will not be available.

19. The screen and the buttons are now enabled and available to users who have this role.

Loans ▾
Lock ▾
Purchase Advice ▾
Send/Status
Summary
Request
Lock Verification
Confirm
Final Commitment
Pricing Review
Purchase Advice

Loan Information

Loan Type	Conventional ▾	Subject Property	
Term	360	Address	10655 Birch St
Note Rate	9.000 %	Unit Type	▾
Total Loan Amount	\$ 300,000.00	Unit Number	
First Payment Date	<input type="text"/>	City	Burbank
		State	CA ▾ ZIP 91502-1234

Purchase Advice Detail

Sale Date	<input type="text"/>	Amount Purchased	\$ <input type="text"/>
Investor First Payment Date	<input type="text"/>	Per Diem Interest Basis	360 ▾
		Per Diem Current Interest Rate	9.000 %

Realized Sell Price

Loan Program	<input type="text"/>
Program Group	<input type="text"/>
Base Price	<input type="text"/> + \$ <input type="text"/> = \$ <input type="text"/>

Price Adjustments

Final Price	Add Adjustment ▾	\$ <input type="text"/>
	0.00000000	\$ 0.00

Interest

Starting Interest Date	to	Sale Date	Interest Days	Per Diem	Per Diem Total
Interest To Sale Date		<input type="text"/>	<input type="text"/>	\$ 0.00	\$ 0.00

Escrows

	Total: \$	0.00
Escrow Name		Charge
No records		

Fees

	Total: \$	0.00
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Save Delete Payment Schedule

Buttons are now available and the screen is ready for use!!

20. This completes configuring the **Purchase Advice** screen and its available buttons.