

How to use The Mortgage Office / Genesis Import Wizard

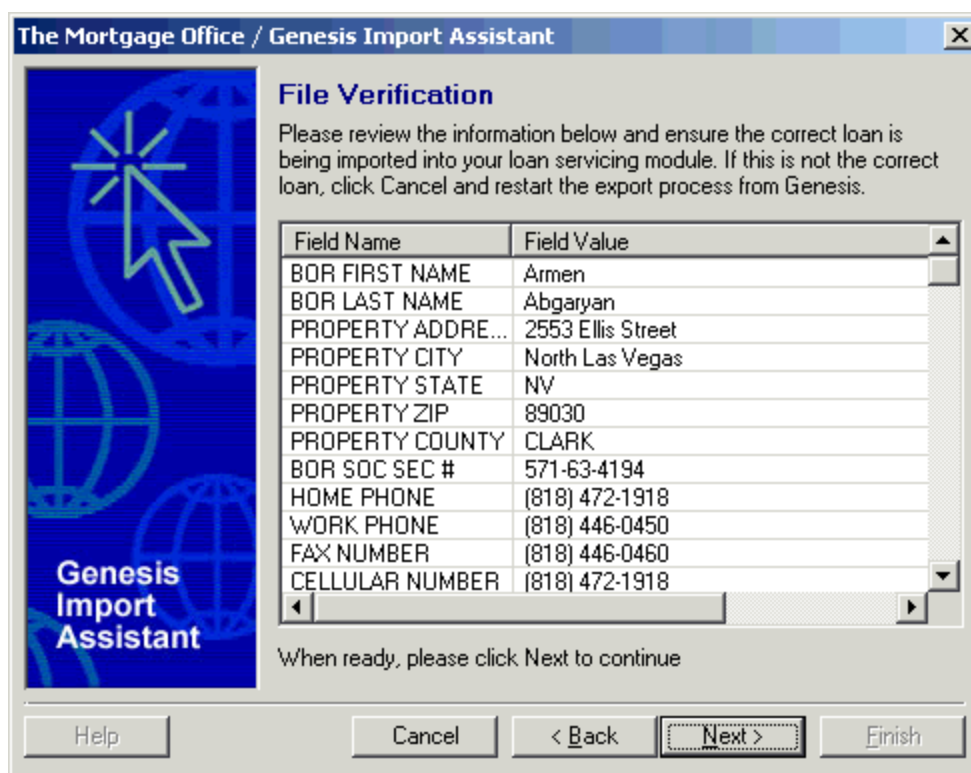
1. Export the Borrower's information, from inside Genesis, to produce the Genesis.csv file. Contact Genesis for instructions on how to do this.
2. Launch The Mortgage Office / Genesis Import Wizard.
3. The Mortgage Office / Genesis Import Wizard's Welcome window will be displayed.



TmoGenesisWizard_01.gif

4. Read the Welcome window and then click on the Next button.

5. The File Verification window will be displayed.



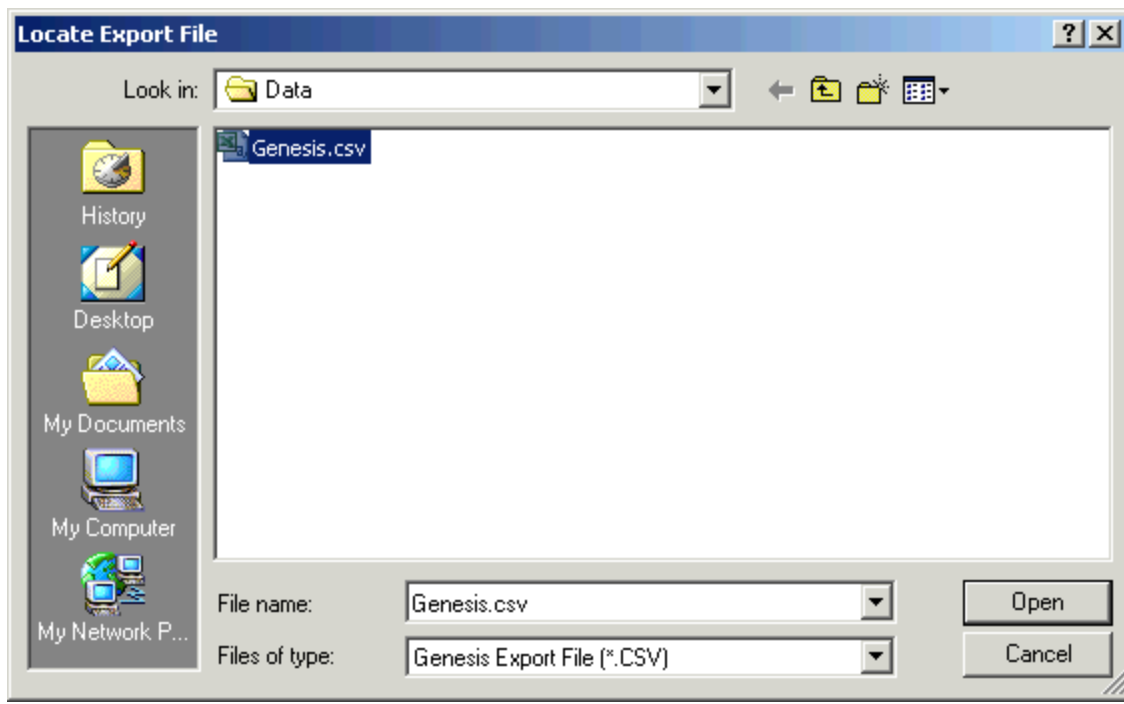
TmoGenesisWizard_03.gif

- a. If you see the following error message instead of the File Verification window, then the Genesis export file named Genesis.csv is missing or located in the wrong directory.



TmoGenesisWizard_02.gif

- i. If you know where the Genesis.csv file is located, you can click on the Yes button to locate the file.

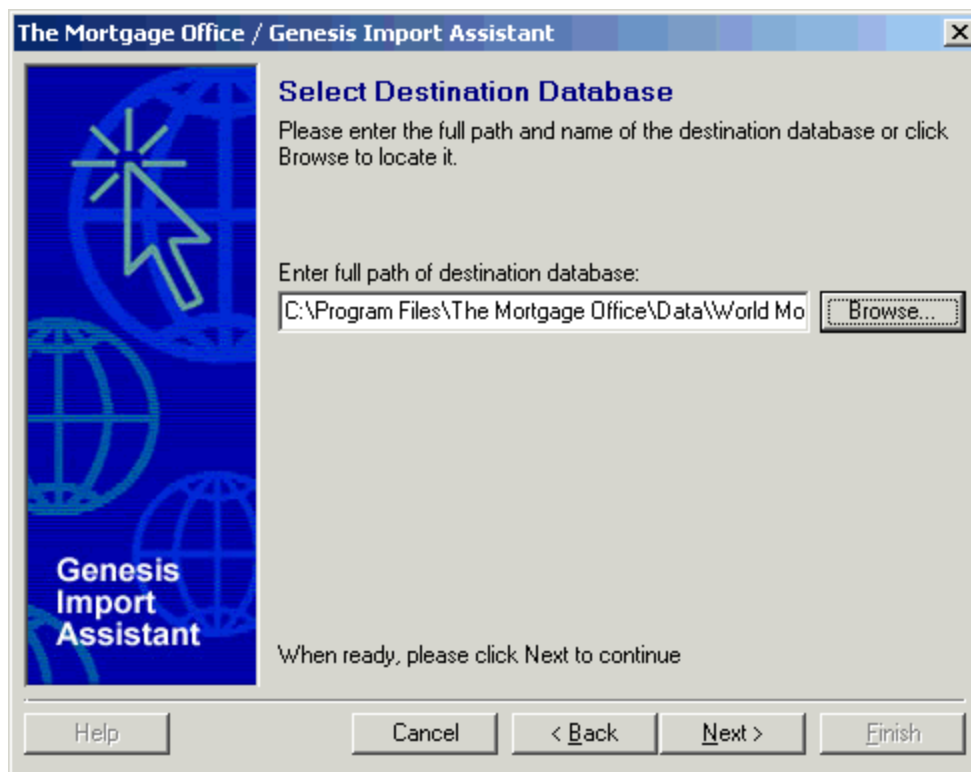


TmoGenesisWizard_09.gif

- ii. If you do not know where the Genesis.csv file is located, contact Genesis.

6. Read the File Verification window and then click on the Next button.

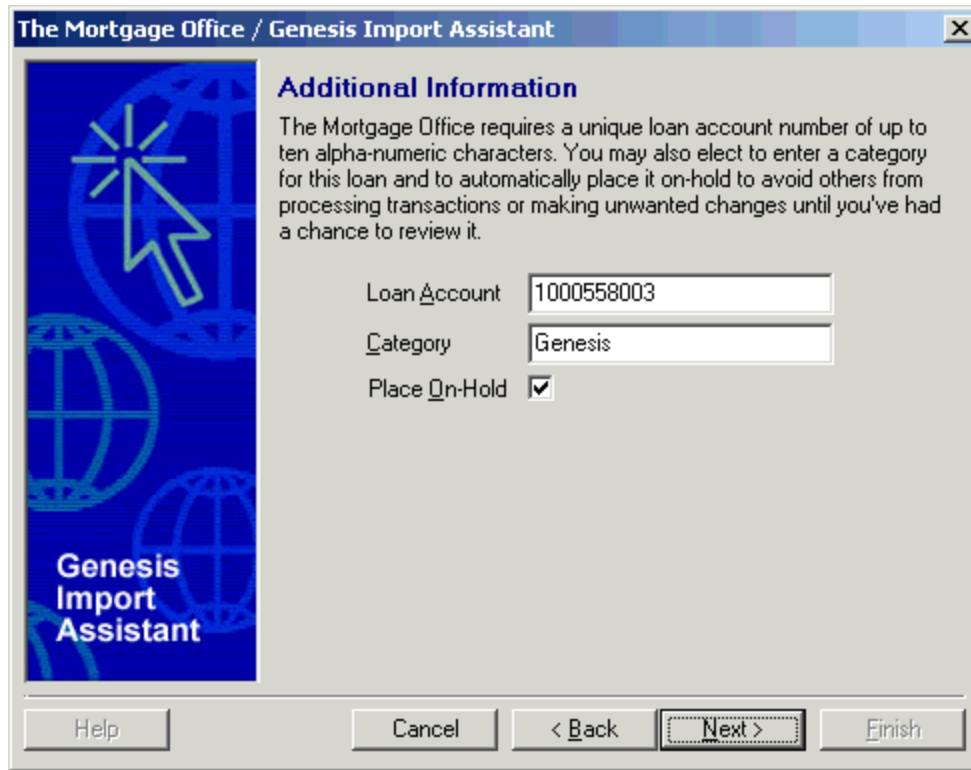
7. The Select Destination Database window will be displayed.



TmoGenesisWizard_04.gif

8. Select which Company database to import the Borrower information into by: Clicking on the Browse button and locating the .tmo database. Then click on the Next button.

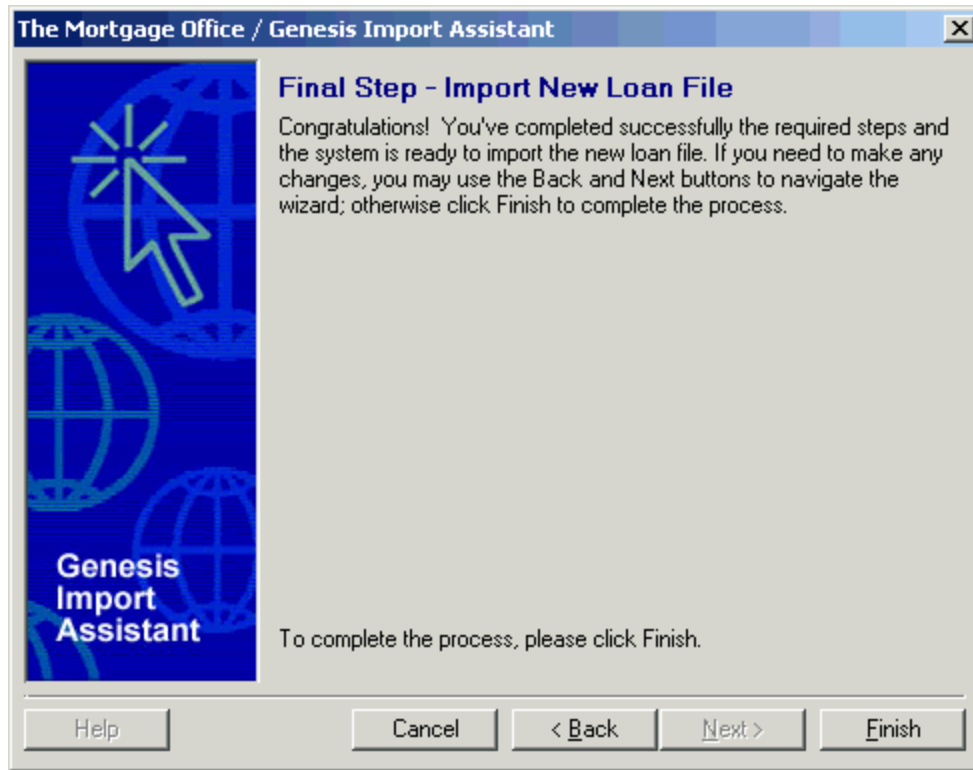
9. The Additional Information window will be displayed.



TmoGenesisWizard_05.gif

10. Read the Additional Information window, accept the defaults or make changes as needed and then click on the Next button.

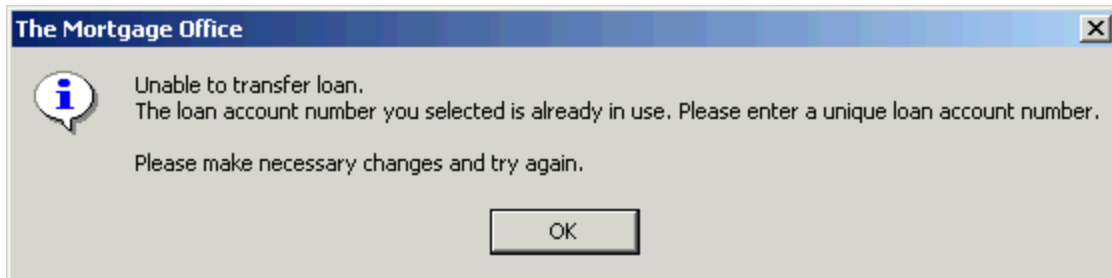
11. The Final Step – Import New Loan File window will be displayed.



TmoGenesisWizard_06.gif

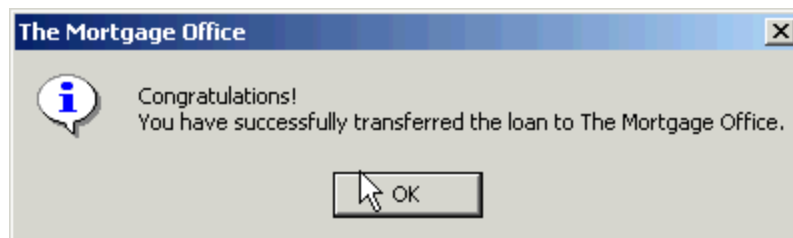
12. Read the Final Step window and click on the Finish button.

13. If you see the following error message, then the Loan that you are trying to import already exists in The Mortgage Office and cannot be imported again.



TmoGenesisWizard_07.gif

14. When you see the following message, the import competed successfully.



TmoGenesisWizard_08.gif