



Server Reference

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Table of Contents

1	Introduction.....	1
1.1	Features.....	3
1.2	System Requirements.....	4
1.3	Technical Support.....	4
2	Installing the Software.....	5
2.1	Automatic Installation	6
2.2	Manual Installation	10
2.3	Uninstalling the Software.....	16
3	Starting The Software.....	19
3.1	Starting From An LOS.....	20
3.2	Enter UserID and Password.....	21
3.3	Getting to Work.....	22
3.4	Exiting the Software.....	23
4	Configuring the Software.....	25
4.1	Profile Setup	26
4.1.1	Server Profile Window	27
4.1.2	Client Customer Profile Window	28
4.1.3	Adding Profiles	31
4.1.4	Deleting Profiles	32
4.2	Connection Settings	33
4.2.1	Phone Settings.....	33
4.2.2	TCP/IP Settings	36
4.3	Server Options.....	37
4.4	Timeout Settings	39
5	Learning the Environment.....	41
5.1	Moving Between Window Items.....	42
5.1.1	Mouse	42
5.1.2	Keyboard.....	42
5.2	Menus and Buttons	43
5.2.1	Menu Bar.....	43
5.2.2	Setup Menu.....	48
5.2.3	Security Menu.....	48
5.2.4	Help Menu	48
5.3	Button Bar	49
5.3.1	Viewing a Report	50
5.3.2	Printing a Report.....	50
5.3.3	Canceling a Process.....	51
5.3.4	Stopping Server Activity	51
5.4	Processed Credit Reports Window.....	52
5.4.1	Sorting Columns.....	52

5.4.2	Collapsing Columns	52
5.4.3	Resizing Columns	53
5.4.4	Moving Columns	54
5.4.5	Deleting Transactions	55
5.5	The Communications Status Bar	56
5.6	Viewing Logs and Reports.....	57
5.6.1	Print Preview Window	58
6	<i>Security and User Administration.....</i>	<i>61</i>
6.1	Enabling the Security Function	62
6.2	Adding the System Administrator.....	63
6.3	Adding Users	65
6.4	Deleting Users	66
6.5	Deactivate Security.....	67
6.6	Working with Security Enabled.....	68
7	<i>Server File Formats.....</i>	<i>69</i>
7.1	Formatting the Server File.....	70
7.2	Format A (Versions 1.1 through 1.3.1)	71
7.3	Format B (Version 1.4.1)	73
7.4	Format C (Version 1.5.0).....	76
7.5	Format D (ECHO Format).....	80
7.5.1	Coding Structure	80
7.5.2	Format D Fields.....	82
7.5.3	Normal Address	83
7.5.4	Post Office Box Address	84
7.5.5	Rural Route Address	85
7.6	Format E (Version 1.7.0).....	90

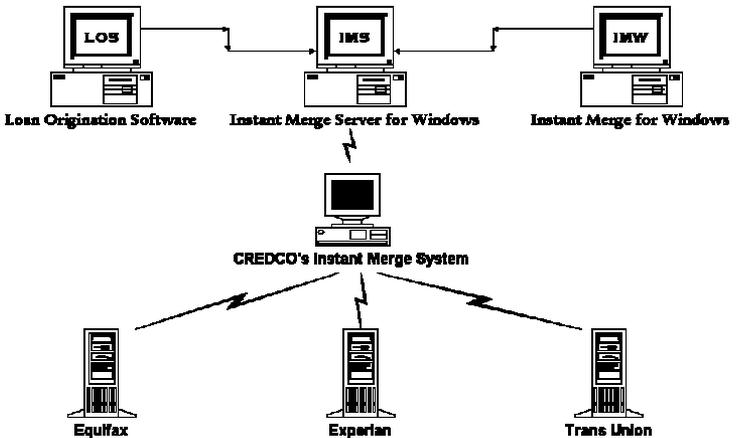
List of Tables

<i>Table 7-1. Format A Fields</i>	<i>71</i>
<i>Table 7-2. Format B Fields.....</i>	<i>74</i>
<i>Table 7-3. Format C Fields</i>	<i>77</i>
<i>Table 7-4. Notes - Format D.....</i>	<i>82</i>
<i>Table 7-5. Borrower Data - Format D.....</i>	<i>82</i>
<i>Table 7-6. Present Address - Format D</i>	<i>82</i>
<i>Table 7-7. Co-borrower Data - Format D.....</i>	<i>86</i>
<i>Table 7-8. Former Address - Format D.....</i>	<i>86</i>
<i>Table 7-9. Profile Identification - Format D.....</i>	<i>87</i>
<i>Table 7-10. Output Filename - Format D</i>	<i>87</i>
<i>Table 7-11. Automatic Print - Format D.....</i>	<i>88</i>
<i>Table 7-12. Automatic Delete - Format D.....</i>	<i>88</i>
<i>Table 7-13. Repository Selection Override - Format D.....</i>	<i>89</i>
<i>Table 7-14. Format E Fields.....</i>	<i>90</i>

1 Introduction



Instant Merge Server for Windows, was created by First American CREDCO to allow Local Area Network (LAN) and database users to process database files prepared by software other than **Instant Merge for Windows Client** software. Files, conforming to one of the various **Instant Merge Server** file formats, can be imported from **Instant Merge for Windows Client**, commercial Loan Origination Software (LOS), or other data entry products, and processed by **Instant Merge** to produce fast, accurate credit reports.



Using the **Instant Merge® Server for Windows** software and your computer, applicant data is imported and sent to First American CREDCO's host computers, repository data is obtained and processed, and the final merged report is returned to you in about one minute.

Instant Merge® Server *for Windows* provides a quick pull of tradeline data from any, or all, of the three credit bureaus Equifax [EFX], Experian [XPN], or Trans Union [TUC]. Credit data for a particular borrower can be reported differently by each of the three national bureaus. These bureaus may also vary their data collection and coverage by geographical areas in the country. **Instant Merge®** *for Windows* simplifies the credit report process for you by using its powerful patented merge logic to compare twelve credit and public record variables, and eliminate duplicate tradelines.

Instant Merge® *for Windows* then presents the strongest tradeline or public record data in an easy-to-read report.

1.1 Features

The **Instant Merge Server** for Windows application includes the following features:

- ◆ Easy to use interface
- ◆ Native Windows application
- ◆ Rapid report generation and delivery
- ◆ One, two, or three credit repository requests are merged into a single credit report
- ◆ Communicates via the public telephone system or TCP/IP
- ◆ Provides its own telecommunications software (no other communications software is required)
- ◆ Allows a variety of transmission options
 - ◆ Single credit report application
 - ◆ Multiple credit report applications (up to 999)
 - ◆ Batch transmission of any subset of the applications, or all of the applications
- ◆ Provides for a variety of configuration options
- ◆ Printer selection
- ◆ File and program access security
- ◆ Transaction logging
- ◆ Communication error logging
- ◆ Easy to understand error messages.

1.2 System Requirements

The following list defines the **Instant Merge Server** for Windows hardware requirements:

- ◆ 486 DX-66 (or higher) IBM Compatible PC
- ◆ VGA (or higher) Video Adapter
- ◆ 6 Megabytes Available Hard Drive Space (10 Megabytes recommended)
- ◆ 16 Megabytes RAM
- ◆ Hayes Compatible Data-Fax Modem - 14.4 KBPS
- ◆ Microsoft Windows 95/98

1.3 Technical Support

Technical support is available through the First American CREDCO Help Desk. For assistance, call:

(800) 423-1150

Technical Support is available Monday through Friday from 6:00 a.m. to 8:00 p.m. Pacific Time, on and Saturday and Sunday from 10:00 a.m. to 3:00 p.m. Pacific Time..

2 Installing the Software

The **Instant Merge Server** for Windows software is installed on the PC using a floppy disk, or CD-ROM drive, and a hard disk drive. Each drive has a letter designator that the operating system recognizes as belonging to that drive.

A typical computer configuration offers a 3.5" floppy diskette as "Drive A:" or "Drive B:", a hard disk as "Drive C:", and a CD-ROM drive as "Drive D". Therefore, the installation in this configuration would be from floppy drive "A:" or "B:" to hard drive "C:", or from CD-ROM drive "D" to hard drive "C".

To determine the correct letter designator for each drive on your computer, refer to your computer's documentation, double-click on the "My Computer" icon, or check with your System Administrator.

The installation of the **Instant Merge Server** for Windows software requires between 10 and 32 Megabytes of disk space, depending on which of the required components are already installed on your PC. If your PC has Windows 98, or Windows 95 with Internet Explorer 4.01, already installed, your installation will require only about 10 Megabytes of space. If these components are not already installed, the extra-required files will bring your total space requirements to approximately 32 Megabytes.

Additionally, we recommend that you have an extra 10 Megabytes of disk space available after installation for storing saved reports.

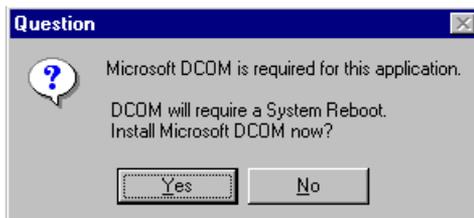
CAUTION: Remember to close all open Windows applications prior to installing **Instant Merge Server**.

2.1 Automatic Installation

Most Windows 95/98 PC's ship with a CD-ROM drive that features an "auto-play" option. If this option has been enabled, software installation, and music CD's, inserted into the drive will automatically start whenever the drive door is closed. Most software installation CD's now provide an "auto-start" capability to take advantage of this unique feature.

The **Instant Merge** installation CD will automatically load the software installation program for you if your CD's "auto-play" option has been enabled.

Because **Instant Merge Server for Windows** is a powerful 32-bit application tightly integrated with Windows 95 and Windows 98, it may require some additional Windows tools to be installed on your PC. If you are not running Windows 98, or Windows 95 with Internet Explorer 4.01, you will initially be advised of the requirement to install the Microsoft DCOM software which is required for **Instant Merge Server for Windows** to function. If you see this window, simply "click" the *Yes* button to install this software.



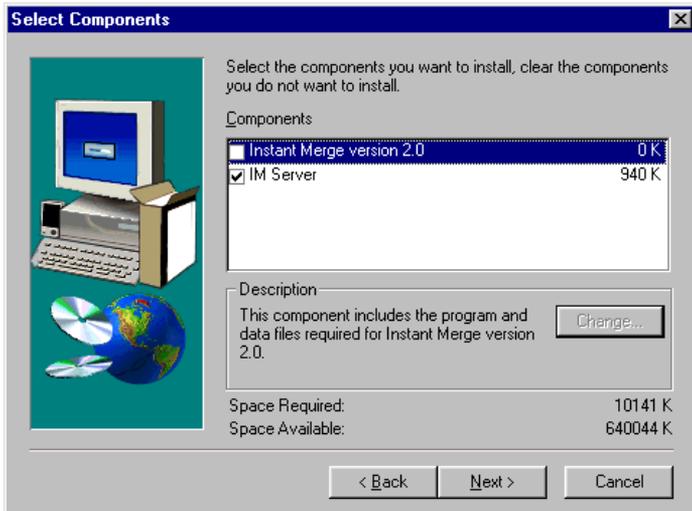
CAUTION: Your PC will automatically shutdown and restart once the DCOM software has finished installing. You must have shutdown all other programs prior to "clicking" the *Yes* button; otherwise you could lose any unsaved work.

The installation program will automatically continue when your PC restarts.

If you do not need to install the above components, the first installation window you will see is the *Welcome Window*. Please read the information presented before continuing.



You should close all active programs before continuing — if you have not already done so. You may do this by clicking on the **Cancel** button, closing each open program individually; and then restarting the installation process. If all of your active programs have been shutdown, “click” on the **Next** button to continue.



You will next be asked if you want to install the **Instant Merge for Windows Client** software, **Instant Merge Server** software, or both. The default installation is for the **Instant Merge for Windows Client** software. Simply “click” on the *IM Server* check box to add a ✓ and install **Instant Merge Server**. To install only the **Instant Merge Server** software, “click” on the **Instant Merge for Windows Client** check box to remove the ✓. **Instant Merge Server** cannot be used without a requirement for any other piece of software. However, it can be used in conjunction with **Instant Merge for Windows Client** software, or one of over 60 commercial Loan Origination Software (LOS) packages, to gain greater credit reporting flexibility for your organization. If you want to install the **Instant Merge Server** software at this time, simply “click” the box to add a ✓ to the **Instant Merge Server** box. Then “click” “Next” to finish the installation.

NOTE: The amount of space required for this installation, and the amount of space available, are identified in this window. The differences between space requirements of individual components, such as **Instant Merge for Windows Client** and **Server**, and total space requirements represent necessary system files being installed with the various software components.

You may customize the **Instant Merge Server** installation by changing the default options during the installation process. The following window allows you to target the installation to a different directory



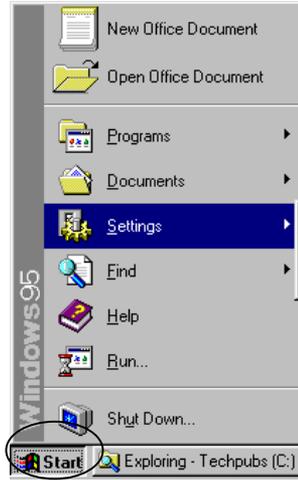
However, for the simplest installation, we recommend you accept the default choices. When you are ready, click the “*Next*” button to continue.

When the installation is complete, you will need to start the software and setup your configuration options to finish the installation and get ready to work.

2.2 Manual Installation

If you have the diskette version, or if the **Instant Merge Server** installation program does not automatically start when you insert the installation CD, you will need to install **Instant Merge Server** manually.

The simplest method is to click on your computer's **Start Button**; then click on the *Settings* option on the *Start Menu*; and finally click on *Control Panel* option.



When the *Control Panel* window appears, click on the “*Add/Remove Programs*” icon to manually start the installation process. Using this feature, Windows will automatically search your floppy disk drive, or your CD-ROM drive, for the **Instant Merge** installation program and then automatically start it for you.



However, if you prefer to do everything yourself, the following steps will guide you through a completely manual installation.

Step 1: Place Disk 1 of the **Instant Merge Server** for Windows installation diskettes in the floppy disk drive, or place the **Instant Merge** installation CD in the CD-ROM drive.

Step 2: From the **Start** menu, select

Run.

Step 3: In the *Run* dialog box, enter:

A: \SETUP
or
D: \SETUP



NOTE: You can also use the **Browse** button to browse your computer to locate the installation program. For more information on how to do this please consult your operating system manual.

Step 4: Click on **OK** to launch the installation program

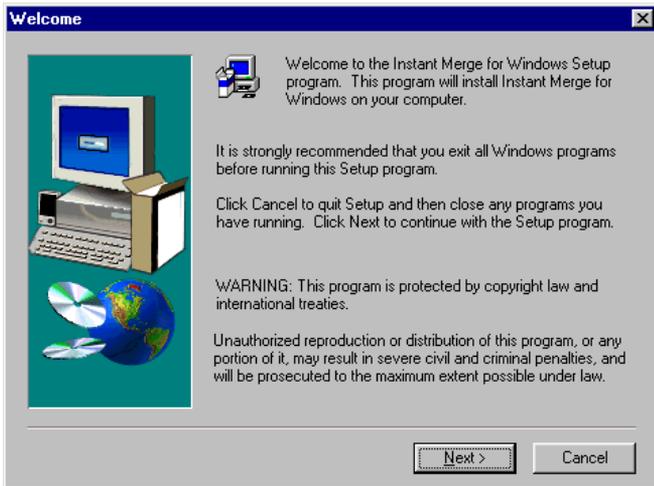
Because **Instant Merge Server for Windows** is a powerful 32-bit application tightly integrated with Windows 95 and Windows 98, it requires that some additional Windows tools be installed on your PC. If you are not running Windows 98, or Windows 95 with Internet Explorer 4.01, you will initially be advised of the requirement to install the Microsoft DCOM software which is required for **Instant Merge Server for Windows** to function. If you see this window, simply “click” the **Yes** button to install this software.



CAUTION: Your PC will automatically shutdown and restart once the DCOM software has finished installing. You must have shutdown all other programs prior to “clicking” the **Yes** button; otherwise you could lose any unsaved work.

The installation program will automatically continue when your PC restarts.

If you do not need to install the above components, the first installation window you will see is the *Welcome Window*. Please read the information presented before continuing.



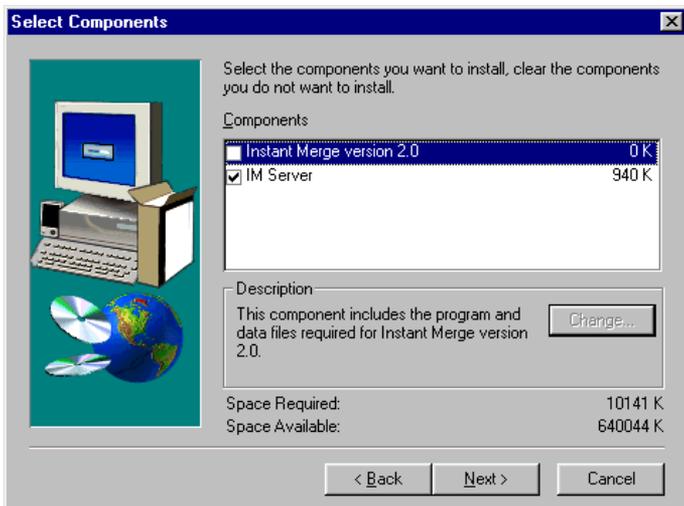
You should close all active programs before continuing. You may do this by clicking on the *Cancel* button, closing each open program individually; and then restarting the installation process. If all of your active programs have been shutdown, “*click*” on the *Next* button to continue.

You may customize the **Instant Merge Server** installation by changing the default options during the installation process. The following window allows you to target the installation to a different directory.



However, for the simplest installation, we recommend you accept the default choices. When you are ready, click the “*Next*” button to continue.

You will next be asked if you want to install the **Instant Merge for Windows Client** software, **Instant Merge Server** software, or both.



The default installation is for the **Instant Merge for Windows Client** software. Simply “click” on the *IM Server* check box to add a ✓ and install **Instant Merge Server**. To install only the **Instant Merge Server** software, “click” on the **Instant Merge for Windows Client** check box to remove the ✓. **Instant Merge Server** cannot be used without a requirement for any other piece of software. However, it can be used in conjunction with **Instant Merge for Windows Client** software, or one of over 60 commercial Loan Origination Software (LOS) packages, to gain greater credit reporting flexibility for your organization. If you want to install the **Instant Merge Server** software at this time, simply “click” the box to add a ✓ to the **Instant Merge Server** box. Then “click” “Next” to finish the installation.

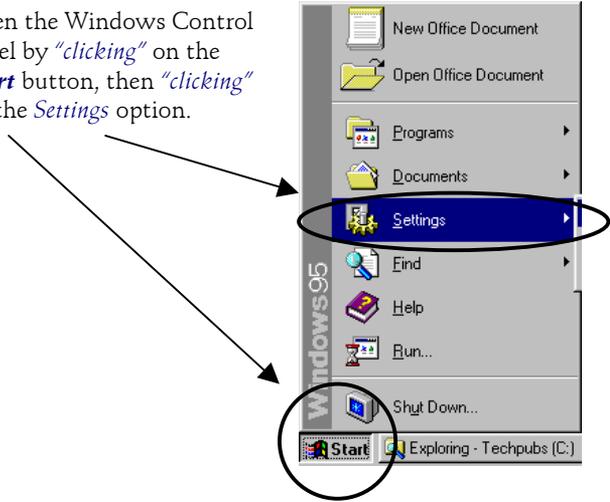
NOTE: The amount of space required for this installation, and the amount of space available, are identified in this window. The differences between space requirements of individual components, such as **Instant Merge for Windows Client** and **Server**, and total space requirements represent necessary system files being installed with the various software components.

When the installation is complete, you will need to start the software and setup your configuration options to finish the installation and get ready to work. For information on starting **Instant Merge Server** *for Windows*, please refer to *Chapter 3, Starting the Software*. For information on configuring **Instant Merge Server** *for Windows*, please refer to *Chapter 4, Configuring the Software*.

2.3 Uninstalling the Software

Instant Merge Server for Windows also includes an uninstall utility to allow you to easily uninstall the software should the need ever arrive. To uninstall **Instant Merge Server for Windows** just follow these simple steps:

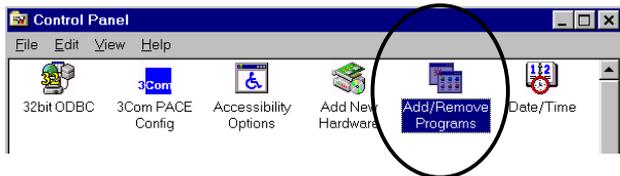
Step 1: Open the Windows Control Panel by "*clicking*" on the **Start** button, then "*clicking*" on the **Settings** option.



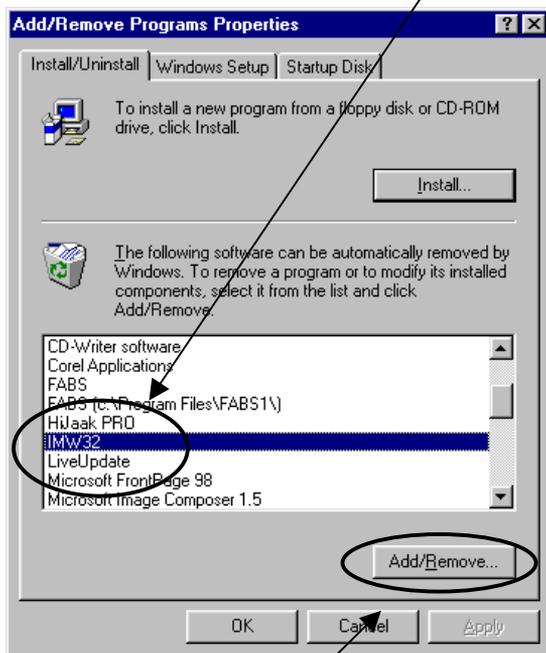
Step 2: Next select the **Control Panel** option.



Step 3: Then select the **Add/Remove Programs** icon.



Step 4: When you see the following window, browse through the list of installed programs until you find **IMW32** and “click” on it to select it.



Then “click” on the **Add/Remove** button to start the automatic uninstall process.

WARNING: If you have both **Instant Merge Server for Windows** and **Instant Merge for Windows Client** installed, they will both be uninstalled at this time. **DO NOT CONTINUE UNLESS YOU WISH TO REMOVE BOTH PROGRAMS.**

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3 Starting The Software

The following section details the steps to start **Instant Merge Server for Windows** software.

Step 1: Click on the **Start** menu button.

Step 2: Select *Programs* → *IM Server 2.0* → *IM Server 2.0*.



Step 3: When **Instant Merge Server** is started for the first time, you will be required to enter the configuration information for your organization. **Instant Merge** will prompt you to establish a new connection based on information provided by account setup, and to select which modem you desire to use (if your PC has more than one modem installed). For more details on how to complete these configuration windows please refer to *Chapter 4, Configuring the Software*.

3.1 Starting From An LOS

Instant Merge Server for Windows also provides a switch for use with Loan Origination Software (LOS) packages. This switch provides a command line option that instructs **Instant Merge Server** to start up, process a credit request, wait to receive and process the completed report, and then automatically exit.

This is easily accomplished by using the following command line syntax within your LOS application:

```
START /WAIT (PATH)\CREDCO\IMWSVR32.EXE /S
```

NOTE: This switch will not work if *Security* has been enabled.

3.2 Enter UserID and Password

Instant Merge Server provides a security function that protects access to the **Instant Merge Server** program and your credit files. If the security feature has been setup and activated, **Instant Merge Server** displays the following *Security* window each time the software is started.



To access the **Instant Merge Server** program:

1. Enter your user identification and password.
2. Click on the **OK** button.

To learn how to configure security for your system, or to add new users, refer to *Chapter 6, Security and User Administration*.

3.3 Getting to Work

When **Instant Merge Server** is started, you will see the following window:



Now you can put the power of **Instant Merge Server** to work. You will find the following sections in this manual very helpful.

- ◆ **Chapter 4**, Configuring the Software
- ◆ **Chapter 5**, Learning the Environment
- ◆ **Chapter 6**, Security and User Administration
- ◆ **Chapter 7**, Server File Formats

3.4 Exiting the Software

To exit the **Instant Merge Server for Windows** program, “click” on the *Exit* button  in the top right corner of the window.

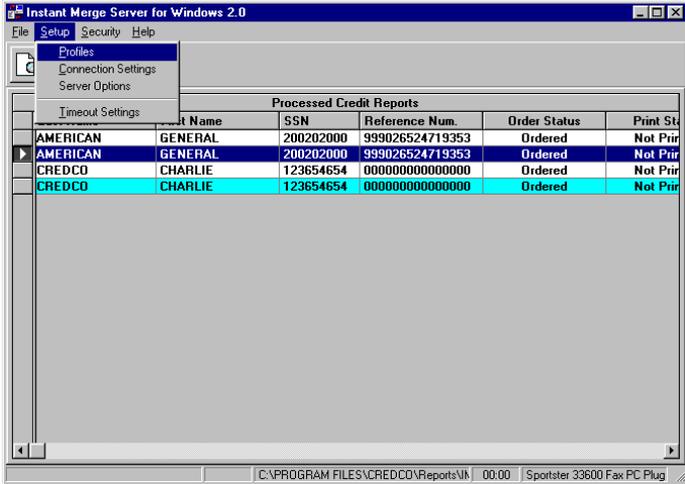


You may also click on the *File* menu and select the *Exit* option.

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4 Configuring the Software

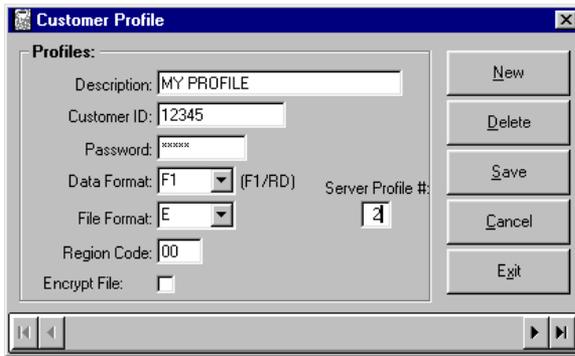
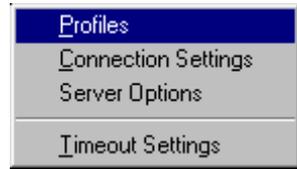
All of the Configuration windows can be accessed from the *Setup* menu within the **Instant Merge Server for Windows** program.



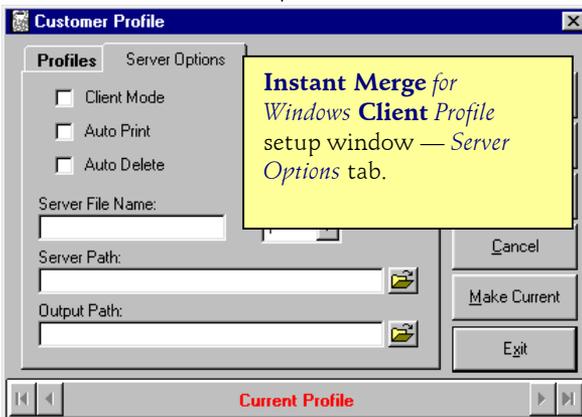
4.1 Profile Setup

Selecting the *Profiles* option on the *Setup Menu* will bring up the *Customer Profile* window.

The *Customer Profile* window is used to enter your First American CREDCO account specification. This window is used to configure a profile with your account information.



NOTE: If you have **Instant Merge for Windows Client** installed, you must also **configure** the **Server Options** tab in the client software for them to work together correctly.



4.1.1 Server Profile Window

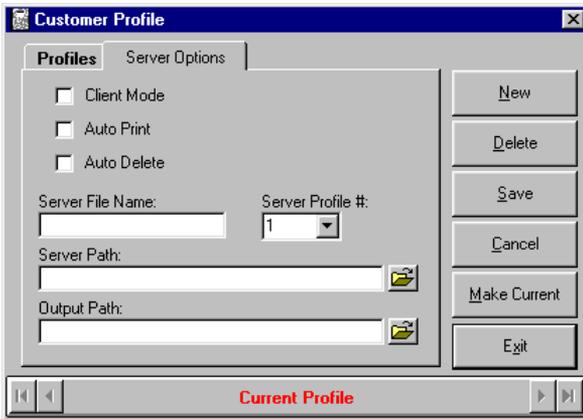
The *Customer Profile* window is used to enter your First American CREDCO account specification. To setup a profile, just follow these simple steps:

- Step 1: OPEN EMPTY PROFILE:** To open a blank screen for your new profile, you must first “click” on the **New** button.
- Step 2: DESCRIPTION:** Enter a description of the profile in the *Description* text box. The description is for your own use. It is recommended that you enter information about the account, such as FICO scores, number of bureaus, etc.
- Step 3: CUSTOMER ID:** Enter your customer identification number in the *Customer Id* text box. This number is your **Instant Merge** account number and is supplied by First American CREDCO.
- Step 4: PASSWORD:** Enter your customer password in the *Password* text box. This password is supplied by First American CREDCO.
- Step 5: DATA FORMAT:** Select the report format, **F1** or **RD**, from the *Data Format* drop down list box. Selecting **F1** requests the formatted **Instant Merge** report. Selecting **RD** requests the Raw Data format. *The default is F1, which has already been entered for you. This is the only report format you should use unless directed to change it by Account Setup.*
- Step 6: FILE FORMAT:** Select the **Instant Merge Server** file format, **A**, **B**, **C**, **D**, or **E**, from the *File Format* drop down list box. Refer to the *Chapter 7, Server File Formats* for more detailed information.

- Step 7: SERVER PROFILE #:** The *Server Profile #* displayed here is used by **Instant Merge for Windows Client** and must match the *Server Profile #* displayed in the Client Software's *Customer Profile* window.
- Step 8: REGION CODE:** The default Region Code of **00** is already entered in the *Region Code* text box. Do not change this number unless directed to do so by Account Setup.
- Step 9: ENCRYPT FILE:** To enable file encryption, click on the *Encrypt File* check box, so that a ✓ appears in the box. When file encryption is enabled, files stored on the hard disk are encrypted and can be read by **Instant Merge** only.
- Step 10: FINISH:** "Click" on **Save** to save the information entered for this profile, or **Cancel** to "undo" your changes.

4.1.2 Client Customer Profile Window

If you are also using **Instant Merge for Windows Client** software as the "front-end" for your credit requests, you will also need to configure the *Server Options* tab in the *Profile Setup* section of the **Instant Merge for Windows Client** software. If you need help finding this section, please refer to the **Instant Merge for Windows Client** User's Manual. When you have found the *Customer Profile* window, "click" on the *Server Options* tab and follow these simple steps:



- Step 1: CLIENT MODE:** Place a ✓ in the *Client Mode* check box. This will tell **Instant Merge for Windows** to deposit all credit requests into a file for **Instant Merge Server** to submit.

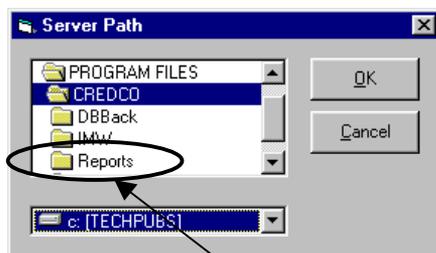
- Step 2: AUTO PRINT:** If you want **Instant Merge Server** to automatically print all returned reports before giving them to **Instant Merge for Windows Client**, or your **LOS** software, place a ✓ in the *Auto Print* check box.
- Step 3: AUTO DELETE:** If you want **Instant Merge Server** to automatically delete all returned reports after giving them to **Instant Merge for Windows Client**, or your **LOS** software, place a ✓ in the *Auto Delete* check box.
- Step 4: SERVER FILE NAME:** Enter the name of the file to be imported from the client software in the *Server File Name* text box. The **IMS.RUN** filename is a reserved name and can *not* be used.

NOTE: In order to ensure compatibility with the maximum number of LOS platforms, this filename has been limited to the standard MS-DOS naming conventions of 8 characters to the left of the period and 3 characters to the right of the period. For example:

XXXXXXXXX.XXX

- Step 5: SERVER PROFILE #:** Select the *Server Profile #* that matches the *Server Profile #* displayed in the **Instant Merge Server Customer Profile** window.
- Step 6: SERVER PATH:** Enter the server path in the *Server Path* text box. This is where the server will look for the credit request.

You may also select the **Browse** button to find the correct *Server Path* that will be used.



The *Server Path* selection window will allow you to browse to *any* file folder on your PC or network.

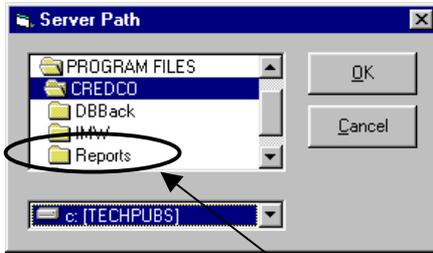
NOTE: You may select any folder you desire. However, the location must be the same for both the **Instant Merge Server** and *Client* (or LOS) software applications. For your convenience, **Instant Merge for Windows Client** creates a "Reports" folder in the Credco folder.

You may also use standard Windows browse techniques to locate another folder on your PC or network. For more information on “browsing” consult your Windows operating system manual, or contact your System Administrator.

Once you have found your folder, “clicking” on it will select it for your *Server Path*. “Clicking” on the **OK** button will then automatically enter it into the *Server Path* text box. As usual, “click” the **Cancel** button to “undo” your choices.

Step 7: OUTPUT PATH: Enter the output path in the *Output Path* text box. This is where the returned credit report is placed.

You may also select the **Browse** button to find the correct *Output Path* that will be used.



The *Server Path* selection window will allow you to browse to *any* file folder on your PC or network.

NOTE: You may select any folder you desire. However, the location must be the same for both the **Instant Merge Server** and *Client* (or LOS) software applications. For your convenience, **Instant Merge for Windows Client** creates a “Reports” folder in the Credco folder.

You may also use standard Windows browse techniques to locate another folder on your PC or network. For more information on “browsing” consult your Windows operating system manual, or contact your System Administrator.

Once you have found your folder, “clicking” on it will select it for your *Output Path*. “Clicking” on the **OK** button will then automatically enter it into the *Output Path* text box. As usual, “click” the **Cancel** button to “undo” your choices.

WARNING: If an output path is included in the server file name, that path supersedes the entry in the *Output Path* text box.

Step 8: **FINISH:** “Click” on **Save** to save the information entered for this profile or **Cancel** to “undo” your changes.

4.1.3 Adding Profiles

Instant Merge Server for Windows supports multiple profiles. To create additional profiles:

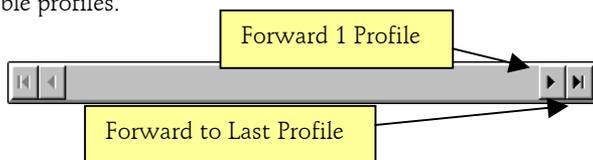
Step 1: **ADD NEW PROFILE:** “Click” on the **New** button to display a blank *Customer Profile* window.

Step 2: **ENTER INFORMATION:** Enter the profile and server option information. See the previous section for a description of the Profile window fields and requirements

Step 3: **FINISH:** “Click” on **Save** to save the information entered for this profile or **Cancel** to “undo” your changes.

NOTE: For your convenience, all buttons, except the **Cancel** and **Delete** buttons, automatically save your changes as you exit this window.

Use the scroll bar at the bottom of the window to scroll through the available profiles.

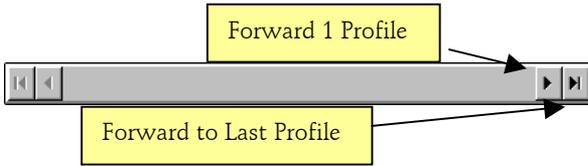


NOTE: You may choose to add different profiles to accommodate your unique business requirements, such as separate billing identification or specific functionality differences.

4.1.4 Deleting Profiles

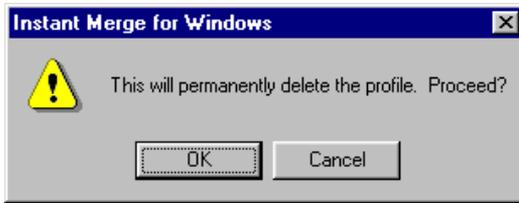
To delete a profile, just follow these simple steps:

Step 1: FIND PROFILE: Use the scroll bar to display the profile you want to delete.



Step 2: DELETE: "Click" on the *Delete* button. A warning window is displayed.

Step 3: FINISH: If you are sure you want to permanently delete the profile, click on *OK*. "Click" on *Cancel* if you do not want to delete this profile.



4.2 Connection Settings

The *Connection Settings* window is used to set up the method and means of connecting to the First American CREDCO facility. At present, two methods are available — Dial Phone connection and TCP/IP for large, leased line customers.



4.2.1 Phone Settings

Dial-up access is available through CompuServe® and SprintNetSM. To setup your system for dial-up access, follow these simple steps:

Step 1: SERVICE: You must first choose the Service you will be using. Simply click on the desired Service so that a ● appears adjacent to your selection.

Step 2: DIAL PHONE NUMBER: Enter the local CompuServe® or SprintNetSM telephone number in the *Dial Phone Number* text box.

You may obtain a local access for your Service by calling the below information numbers, or the **Instant Merge Help Desk**.

(800)635-6225 — CompuServe®

(800)890-5128 — SprintNetSM

(800)423-1150 — Help Desk

The CompuServe® and SprintNetSM telephone numbers are automated systems requiring a touch-tone telephone. Simply answer the questions using the keypad on your telephone. These automated systems will provide you with a local telephone access number. If you prefer to speak to “real person”, you can also get an access number from our Help Desk personnel during the normal working hours listed in *Chapter 1, paragraph 1.3, Technical Support*. Then enter that number in the *Dial Telephone Number* box above.

Step 3: LOCAL PHONE NUMBER: Enter the telephone number of your PC in the *Local Phone Number* text box.

Step 4: SERVER ID NUMBERS: The *CompuServe Server* and *Sprint Server ID Number* boxes have already been completed for you.



CompuServe Server: CRD01
Sprint Server: C 714439.01

CAUTION: Do not change these fields without specific instructions from Technical Support.

Step 5: CONNECT USING: The *Connect Using* box is a “drop-down” box from which you can select, or configure, a modem to be used to send and receive your credit requests.



Connect Using: Sportster 33600 Fax PC Plug and Play [Configure]
From Location: Hayes 9600 Bps Modem [Configure]
Hayes Optima 144
Sportster 33600 Fax PC
Sportster 33600 Fax PC Plug and Play

This list will contain a list of all modems installed on your PC. *In most cases, you will have only one modem on your list.* Simply click on the modem you desire to use and it will be displayed in this box. If you desire to change the modem’s configuration, then “click” on the *Configure* button. You will be presented with the standard Windows modem properties windows to allow you to change the configuration. For more information on reconfiguring your modem, please refer to your Windows 95 or 98 User Manual, your modem documentation, or contact your System Administrator.

Step 6: FROM LOCATION: The *From Location:* box will use the default location that has been identified during the installation of your modem.



From Location: Default Location [Configure]

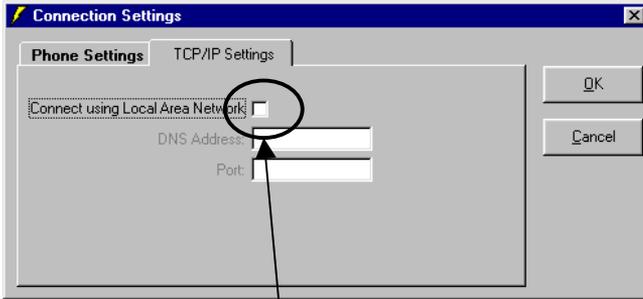
If you need to change the default location's configuration, then "*click*" on the **Configure** button. You will be presented with the standard Windows dialing properties windows to allow you to change the configuration. For more information on reconfiguring your dialing properties, please refer to your Windows 95 or 98 User Manual, your modem documentation, or contact your System Administrator.

NOTE: If you are in a Metro dialing area you should call Technical Support for detailed guidance on configuring your system.

Step 7: FINISH: "*Click*" on **OK** to save the telephone numbers.

4.2.2 TCP/IP Settings

The *TCP/IP Settings* window is used by large customers with dedicated CREDCO “leased lines.” All boxes on this window *should be blank* unless the Technical Support staff provides you with specific information for these fields.



When directed by the Technical Support staff to enter information in this window, you must first “click” on *the Connect using Local Area Network* check box. An ✓ in this box will activate the remaining fields.

DNS Address: Technical Support will provide a *DNS Address* for you to enter in this box. The entry will be in the following format:

999.999.999.999

Port: Technical Support will also provide a Port number for you to enter in this box. The entry will be in the following format:

9999

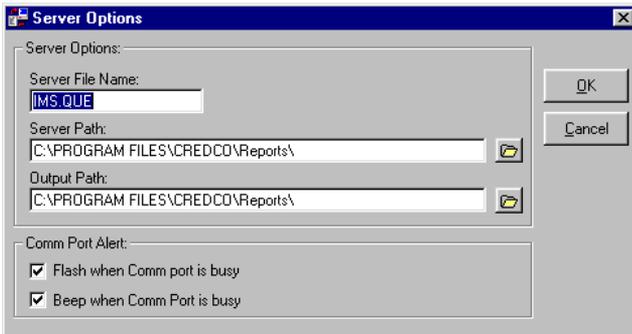
Simply “click” on the **OK** button to save your settings, or the **Cancel** button to “undo” the changes.

4.3 Server Options

The *Server Options* window allows you to configure **Instant Merge Server's** file handling options.



When you “click” on the *Server Options* option you will see the following window.



To configure the *Server Options*, just follow these simple steps:

Step 1: SERVER FILE NAME: Enter the name of the file to be imported from the client software in the *Server File Name* text box. The **IMS.RUN** filename is a reserved name and can *not* be used.

NOTE: In order to ensure compatibility with the maximum number of LOS platforms, this filename has been limited to the standard MS-DOS naming conventions of 8 characters to the left of the period and 3 characters to the right of the period. For example:

XXXXXXXX.XXX

This will be the file name generated by **Instant Merge for Windows Client** or the LOS software and **must match exactly**.

Step 2: SERVER PATH: Enter the server path in the *Server Path* text box. This is where the server will look for the credit request.

NOTE: You may select any folder you desire. However, the location must be the same for both the **Instant Merge Server** and *Client* (or LOS) software applications. For your convenience, **Instant Merge for Windows Client** creates a “Reports” folder in the Credco folder.

This will be the path to the credit request file generated by **Instant Merge for Windows Client** or the LOS software and **must match exactly**.

Step 3: OUTPUT PATH: Enter the output path in the *Output Path* text box. This is where the returned credit report is placed.

NOTE: You may select any folder you desire. However, the location must be the same for both the **Instant Merge Server** and *Client* (or LOS) software applications. For your convenience, **Instant Merge for Windows Client** creates a “Reports” folder in the Credco folder.

This will be the path to the credit report file where **Instant Merge for Windows Client** or the LOS software will look for the returned report and **must match exactly**.

WARNING: If an output path is included in the server file, that path supersedes the entry in the *Output Path* text box.

Step 4: COMM PORT ALERT: Enter a ✓ in the **Comm Port Alert** check boxes if you want **Instant Merge Server** to *Flash* or *Beep* when the Comm Port is busy.

Step 5: FINISH: “Click” on **OK** to save the information entered for this profile or **Cancel** to “undo” your changes.

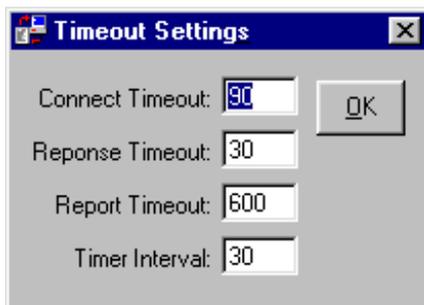
NOTE: For your convenience, all buttons, except the **Cancel** button, automatically save your changes as you exit this window.

4.4 Timeout Settings

The *Timeout Settings* window allows you to control the timeout delays. The default settings will typically work fine on most systems.



When you “click” on the *Timeout Settings* option you will see the following window.



A brief description of these values and their use is as follows:

- Connect Timeout:** The number of seconds **Instant Merge Server for Windows** will wait after the number is dialed, to establish a connection with the communications network before generating a “timeout” error. The time limit can be adjusted up or down. However, the default setting of **90** seconds is usually ample time to obtain a connection.
- Response Timeout:** The number of seconds **Instant Merge Server for Windows** will wait for a response from the CREDCO host computer before generating a “timeout” error. The time limit can be adjusted up or down. The default is **30** seconds.

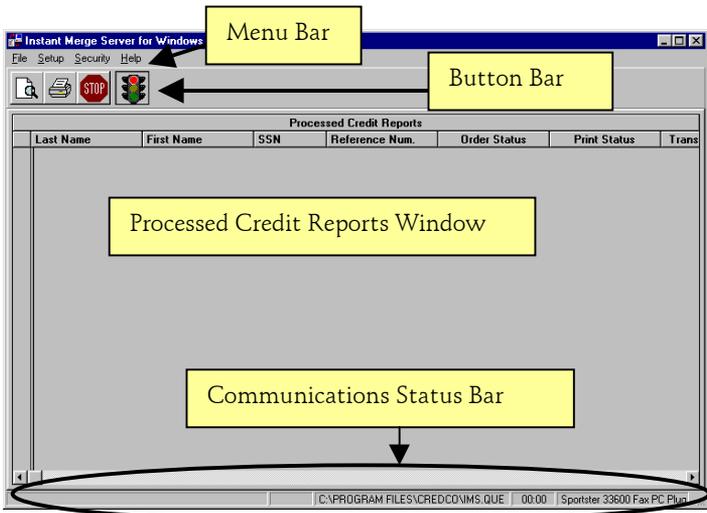
- Report Timeout:** The number of seconds **Instant Merge for Windows** will wait for completed report to be transmitted back to you before the connection is terminated. The time limit can be adjusted up or down. However, setting the time limit below the default **600** seconds, can prevent the return of a complete report if the timeout expires before a complete transfer is accomplished.
- Timer Interval:** The amount of time that **Instant Merge Server for Windows** waits, after processing a server input file, before attempting to process another. This allows users on a Local Area Network (LAN) time to create new server input files between processing periods. The default value is 30 seconds. A maximum of 99 seconds is allowed.

NOTE: These settings should not typically be modified unless directed by Technical Support. However, if adjustments are necessary, simply make the changes and click on the **OK** button.

5 Learning the Environment

The **Instant Merge Server for Windows** software requires no user intervention to import transaction files, order credit reports from First American CREDCO, and receive the returned report. As reports are ordered, the **Instant Merge Server for Windows** window is populated with the transaction information. The **Instant Merge Server for Windows** screen consists of four parts:

- ◆ *Menu Bar*
- ◆ *Button Bar*
- ◆ *Processed Credit Reports Window*
- ◆ *Communications Status Bar*
- ◆ *Viewing Logs & Reports*



5.1 Moving Between Window Items

You may use either of the two standard Windows methods of moving between items on your screen.

5.1.1 Mouse

To use your mouse to move between text boxes, button, combo boxes, radio buttons, etc. on your screen, simply place the mouse cursor over the item of your choice and “*click*” the left mouse button.

5.1.2 Keyboard

To move to the next text box, press

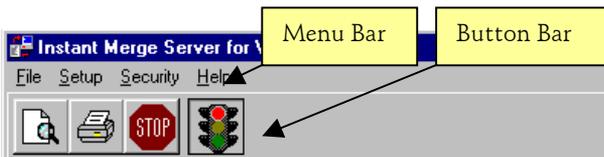
%o

To move back to the previous text box, press

^ + %o

5.2 Menus and Buttons

The *Menu Bar*, located above the *Button Bar*, contains “drop-down” menus with easy-to-use choices to help you setup your system or rapidly view or print reports.



5.2.1 Menu Bar

The *Menu Bar* provides the following menus: *File*, *Setup*, *Security*, and *Help*. A description of these menu items and their use is provided below.

5.2.1.1 File Menu

The *File* menu allows you to print a file, view a file, select a printer, view the error log, view the transaction log, clear the transaction log, and exit the software.

For information on accessing the transaction log or the error log, refer to *Viewing the Transaction Log* or *Viewing the Error Log* later in this chapter.

A description of these menu choices is provided below:



Print

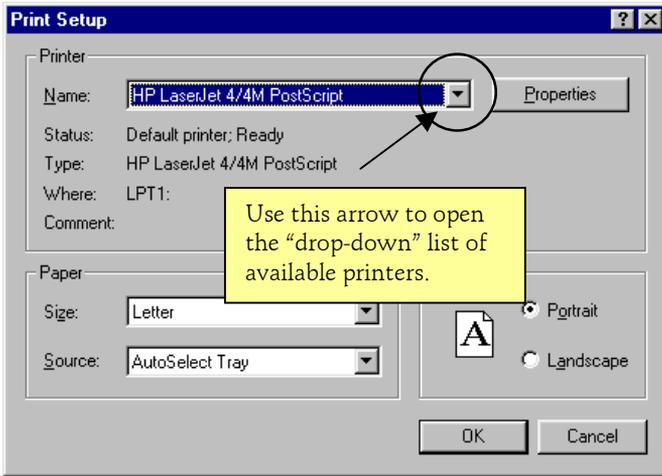
This menu choice may be used interactively with the **Print** button on the *Button Bar*. “Clicking” on either one will send the credit report for the active client to your default printer.

View

This menu choice may be used interactively with the **View** button on the *Button Bar*. “Clicking” on either one will open the credit report for the active client so that you may view it on your PC.

Select Printer

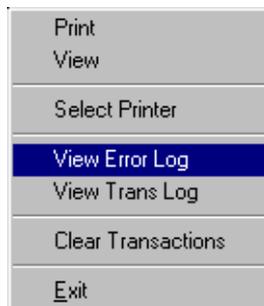
Use this option to select a printer that is *not* your default printer. When you “click” on this menu item, you will be presented with the following Print Setup Window.



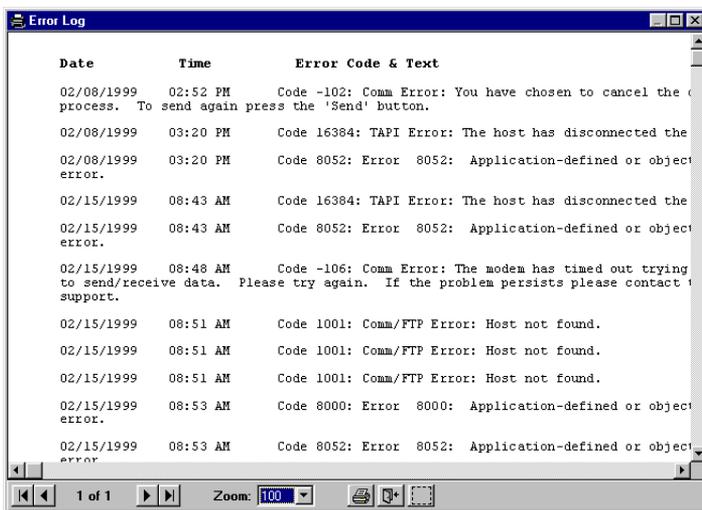
Simply “click” on the printer you want to use. The printer name will appear in the *Name* window. If this is the printer you want, simply “click” on the **OK** button. Then print your report using the **Print** button on the *Button Bar*, or the *Print* menu choice on the *File* menu.

View Error Log

Use this option to view the **Instant Merge Server for Windows Error Log**.



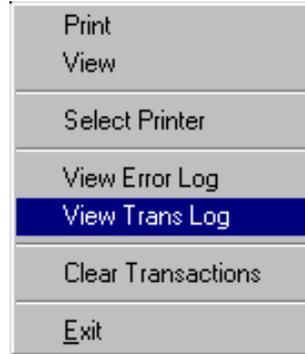
When you “click” on this menu item, you will be presented with the following *Error Log* Window.



The error log displays the Date, Time, Error Code, and Text of the error. This is information that will guide Technical Support in their efforts to help you resolve any errors that may be occurring. For more information on how to use the *Print Preview* window that is displaying the *Error Log*, please refer to the *Viewing Logs, and Reports* section later in this chapter.

View Trans Log

Use this option to view the **Instant Merge Server for Windows Transaction Log**.



When you “click” on this menu item, you will be presented with the following *Transaction Log* Window.

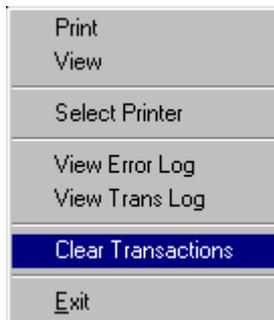
The screenshot shows a window titled 'Transaction Log' with a table of data. The table has the following columns: Last Name, First Name, SSN, Table Record ID number, Transaction Date, Transaction Time, and Reference Number. The data is as follows:

Last Name	First Name	SSN	Table Record ID number	Transaction Date	Transaction Time	Reference Number
AMERICAN	GENERAL	200-20-2000	713	01/28,		
AMERICAN	GENERAL	200-20-2000	710	01/28,		
AMERICAN	GENERAL	200-20-2000	677	01/27,		
AMERICAN	GENERAL	200-20-2000	702	01/27,		
AMERICAN	GENERAL	200-20-2000	718	01/28,		
AMERICAN	GENERAL	200-20-2000	729	01/28,		
AMERICAN	GENERAL	200-20-2000	715	01/28,		
AMERICAN	GENERAL	200-20-2000	727	01/28,		
AMERICAN	GENERAL	200-20-2000	725	01/28,		
AMERICAN	GENERAL	200-20-2000	671	01/27,		
AMERICAN	GENERAL	200-20-2000	674	01/27,		
AMERICAN	GENERAL	200-20-2000	731	01/28,		
AMERICAN	GENERAL	200-20-2000	676	01/27,		
AMERICAN	GENERAL	200-20-2000	695	01/27,		
AMERICAN	GENERAL	200-20-2000	679	01/27,		
AMERICAN	GENERAL	200-20-2000	722	01/28,		
AMERICAN	GENERAL	200-20-2000	691	01/27,		
AMERICAN	GENERAL	200-20-2000	708	01/28,		
AMERICAN	GENERAL	200-20-2000	700	01/27,		
AMERICAN	GENERAL	200-20-2000	693	01/27,		
AMERICAN	GENERAL	200-20-2000	678	01/27,		
AMERICAN	GENERAL	200-20-2000	720	01/28,		
AMERICAN	GENERAL	200-20-2000	675	01/27,		
AMERICAN	GENERAL	200-20-2000	706	01/28,		
AMERICAN	GENERAL	200-20-2000	697	01/27,		
CREDCO	CHARLIE	123-65-4654	730	01/28,		
CREDCO	CHARLIE	123-65-4654	721	01/28,		
CREDCO	CHARLIE	123-65-4654	723	01/28,		

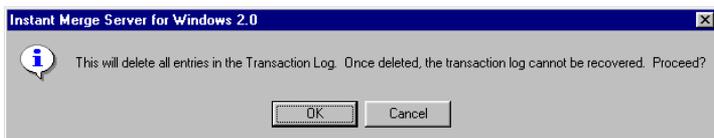
This transaction log displays the Last Name, First Name, SSN, Table Record ID number, Transaction Date, Transaction Time, and Reference Number. This is information that will help you if you ever need to reorder a report. It may also help guide Technical Support in their efforts to help you with other questions regarding your transactions. For more information on how to use the *Print Preview* window that is displaying the *Transaction Log*, please refer to the *Viewing Logs, and Reports* section later in this chapter.

Clear Transactions

Use this option to clear the **Instant Merge Server for Windows Transaction Log**.



When you “click” on this menu item, you will be presented with the following warning window.



To delete all entries in the *Transaction Log*, “click” on the **OK** button. An information window confirms that the *Transaction Log* was successfully deleted. “Click” on the **OK** button to continue.



Exit

Use this option to exit **Instant Merge Server for Windows**.

5.2.2 Setup Menu

The *Setup* menu allows you to access configuration windows used to select configuration options for communication port setup, modem setup, customer profiles setup, phone numbers, and timeout settings. Refer to *Chapter 4, Configuring the Software* for information on selecting configuration options.



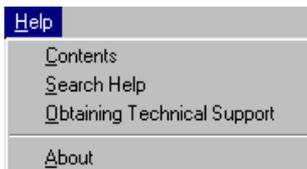
5.2.3 Security Menu



The *Security* menu provides access to the *Instant Merge Security* window. This window allows you secure access to the system by assigning a system administrator and multiple users with user identifications and passwords. Refer to *Chapter 6, Security and User Administration* for additional information.

5.2.4 Help Menu

The *Help Menu* provides access to online Help, Technical Support Information, and information about the **Instant Merge Server** for Windows software.



5.3 Button Bar

The **Button Bar**, located below the *Menu* bar, contains icon buttons that allow you to view a report, print a report, cancel a process, or stop all server processes.



PREVIEW BUTTON: Allows you to view a report for the selected client.



PRINT BUTTON: Allows you to print a report for the selected client



STOP PROCESS BUTTON: Allows you to stop a process.



TRAFFIC LIGHT BUTTON: Allows you to start/stop server processes.

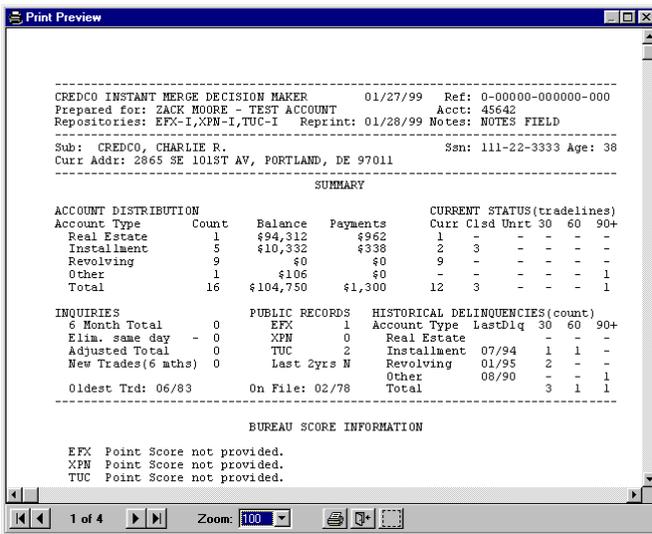
Note: You may only access the configuration menu options when the light is Red. These options are disabled when the light is Green.

The following sections contain more detailed information on these activities.

5.3.1 Viewing a Report

To view a report:

1. Highlight the transaction request you want to view by “*left-clicking*” on the empty box at the left of the transaction request row. When the  symbol appears in the left column, this transaction is now “active” and the associated report can be printed or viewed.
2. “*Left-click*” on  (**Print Preview Button**). The selected report is displayed in the *Print Preview* window.



CREDCO INSTANT MERGE DECISION MAKER 01/27/99 Ref: 0-00000-000000-000
 Prepared for: ZACK MOORE - TEST ACCOUNT Acct: 45642
 Repositories: EFX-I,XFN-I,TUC-I Reprint: 01/28/99 Notes: NOTES FIELD

Sub: CREDCO, CHARLIE R. Ssn: 111-22-3333 Age: 38
 Curr Addr: 2865 SE 101ST AV, PORTLAND, DE 97011

SUMMARY

ACCOUNT DISTRIBUTION			CURRENT STATUS(tradelines)			
Account Type	Count	Balance	Payments	Curr Clsd	Uhr	30 60 90+
Real Estate	1	\$94,312	\$962	1	-	- - -
Installment	5	\$10,332	\$338	2	3	- - -
Revolving	9	\$0	\$0	9	-	- - -
Other	1	\$106	\$0	-	-	- - -
Total	16	\$104,750	\$1,300	12	3	- - - 1

INQUIRIES		PUBLIC RECORDS		HISTORICAL DELINQUENCIES(count)		
				Account Type	LastDly	30 60 90+
6 Month Total	0	EFX	1	Real Estate	-	-
Elig. same day	0	XFN	0	Real Estate	-	-
Adjusted Total	0	TUC	2	Installment	07/94	1 1 -
New Trades(6 mths)	0	Last 2yrs N		Revolving	01/95	2 - -
		On File:	02/78	Other	08/90	- - 1
				Total		3 1 1

BUREAU SCORE INFORMATION

EFX Point Score not provided.
 XFN Point Score not provided.
 TUC Point Score not provided.

1 of 4 Zoom: 100

To learn more about how to control the *Print Preview* window and even adjust the margins of your printed reports, refer to the *Viewing Logs and Reports* section later in this chapter.

5.3.2 Printing a Report

To print a report:

1. Highlight the transaction request you want to print by “*left-clicking*” on the empty box at the left of the transaction request row. When the  symbol appears in the left column, this transaction is now “active” and the associated report can be printed or viewed.
2. “*Click*” on  (**Print button**). The “default” printer will be used.

5.3.3 Canceling a Process

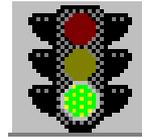


To cancel a process:

1. Click on (STOP Sign button).
2. The current process is canceled.

5.3.4 Stopping Server Activity

When the Server software is looking for server files, dialing out, or communicating with First American CREDCO to order and receive reports, the **Traffic Signal Button** displays a “green light”.



NOTE: When the “green light” is visible, the *Setup* and *Security* menu options are disabled. You must stop server activity before you can make changes to *Setup* or *Security*.



To stop server activity while you perform other tasks, such as viewing or printing:

1. “Click” on the **Traffic Signal Button** so that the “red light” is displayed .
2. To restart server activity, click on the **Traffic Signal Button** so that the “green light” is displayed.

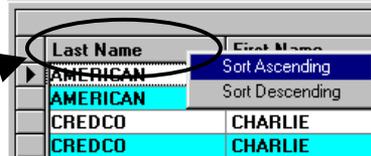
5.4 Processed Credit Reports Window

The *Processed Credit Reports Window* section of the **Instant Merge Server for Windows** window displays the transaction request information, repository access information, order and print status, Instant Merge reference number, output path, and error messages when an error occurs.

Processed Credit Reports								
Last Name	First Name	SSN	Reference Num.	Order Status	Print Status	Transaction Date	Transaction Time	Output Path
BEAR	WINNIE J.	022443196	397141537394644	Ordered	Not Printed	05/21/1997	16:53	F:\temp\unpa
BEAR	WINNIE J.	022443196	397141537229644	Ordered	Not Printed	05/21/1997	16:52	F:\temp\unpa
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/26/1997	10:55	F:\temp\unpa
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/25/1997	10:55	F:\temp\unpa
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/24/1997	10:10	F:\temp\unpa
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/24/1997	10:10	F:\temp\unpa
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/24/1997	10:08	F:\temp\A123
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/24/1997	10:08	F:\temp\A123
CREDCO	CHARLIE	123245566	000000000000000	Ordered	Not Printed	05/21/1997	15:32	F:\temp\A123

5.4.1 Sorting Columns

Columns can be sorted in ascending or descending order. To sort the transactions, “left-click” on the column heading that you want sorted. “Left-click” on *Sort Ascending* or *Sort Descending*. Notice that the transactions are sorted according to the information in the selected column.



5.4.2 Collapsing Columns

At times you may want to collapse a column so you can view other columns more easily. To collapse a column, “right-click” on the column heading.

Processed Credit Reports				
	Last Name	Reference Num.	Order Status	Print Status
▶	AMERICAN	999026524719353	Ordered	Not Printed
	AMERICAN	999026524719353	Ordered	Not Printed
	CREDCO	000000000000000	Ordered	Not Printed
	CREDCO	000000000000000	Ordered	Not Printed

In the example above, the First Name and SSN columns have been collapsed. To expand a column, “right-click” again on the collapsed column heading.

5.4.3 Resizing Columns

If collapsing columns is distracting because you feel you are “loosing track” of which column(s) has been collapsed, or you would like to see “some” of the information in that column, then resizing the columns may be the solution. To resize a column, just follow these simple steps:

Step 1: Move the mouse cursor to the edge of the *Title Bar* in the column you wish to resize. Notice that the mouse cursor changes into .

Step 2: Hold the “left mouse” and “drag” the column smaller, or larger, to accommodate your needs.

Processed Credit Reports						
	Last Name	First Name	SSN	Ref	Order	Print Status
	AMERICAN	GENERAL	200202000	999	Ordered	Not Printed
▶	AMERICAN	GENERAL	200202000	999	Ordered	Not Printed
	CREDCO	CHARLIE	123654654	000	Ordered	Not Printed
	CREDCO	CHARLIE	123654654	000	Ordered	Not Printed

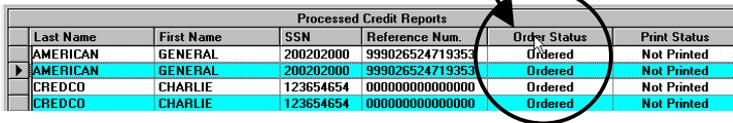
NOTE: *This is only temporary.* The next time you start *Instant Merge Server for Windows*, the columns automatically return to their original widths.

5.4.4 Moving Columns

Instant Merge Server for Windows offers more valuable information than can be displayed on most standard sized PC monitors. To make things easier for you **Instant Merge Server for Windows** provides a feature that can be a real time-saver by allowing you to relocate an important column to within your visible screen area.

Column positions can be changed using standard Windows “*drag and drop*” features. To move a column, follow these simple steps:

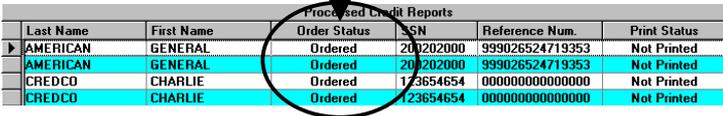
Step 1: Position the cursor in the column heading you want to move.



Processed Credit Reports					
Last Name	First Name	SSN	Reference Num.	Order Status	Print Status
AMERICAN	GENERAL	200202000	999026524719353	Ordered	Not Printed
AMERICAN	GENERAL	200202000	999026524719353	Ordered	Not Printed
CREDCO	CHARLIE	123654654	000000000000000	Ordered	Not Printed
CREDCO	CHARLIE	123654654	000000000000000	Ordered	Not Printed

Step 2: “Click” and hold down the *left* mouse button.

Step 3: “Drag” the column to the new position and “drop” it into position by releasing the mouse button.



Processed Credit Reports					
Last Name	First Name	Order Status	SSN	Reference Num.	Print Status
AMERICAN	GENERAL	Ordered	200202000	999026524719353	Not Printed
AMERICAN	GENERAL	Ordered	200202000	999026524719353	Not Printed
CREDCO	CHARLIE	Ordered	123654654	000000000000000	Not Printed
CREDCO	CHARLIE	Ordered	123654654	000000000000000	Not Printed

NOTE: *This is only temporary.* The next time you start **Instant Merge Server for Windows**, the columns automatically return to their original positions.

5.4.5 Deleting Transactions

To delete transaction requests and the associated credit reports, follow these simple steps:

Step 1: Select the desired transactions:

You may use standard Windows selection techniques to identify the transactions you wish to delete:

SINGLE: To select a single transaction, “left-click” on the empty box at the beginning of the row. When the  symbol appears in the left column, this transaction is now “active” and the transaction can be deleted.

MULTIPLE: To select multiple transactions, press **<Ctrl>** and “left-click” on the empty box at the beginning of the row. Repeat for all transactions that you want to delete.



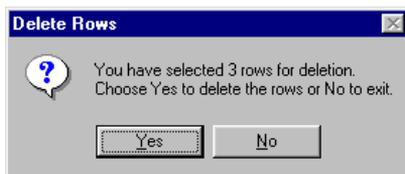
	Last Name
	AMERICAN
	AMERICAN
	CREDCO
	CREDCO

NOTE: All selected records will be highlighted.

RANGE: To select a range of transactions, “left-click” on the empty box to select the first transaction. Press **<Shift>** and left-click on the empty box of the last transaction in the range. All transactions between the first and last selection are highlighted.

Step 2: Press **<Delete>**. **TM**

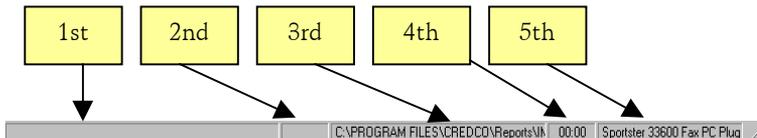
The *Delete Rows* window is displayed to confirm your deletion(s).



Step 3: If you are sure you want to permanently delete the reports, “click” on **Yes**. “Click” on **No** if you do not want to delete the selected reports.

5.5 The Communications Status Bar

The *Communication Status Bar* displays various aspects of the communications process when **Instant Merge Server for Windows** transmits requests and receives reports. The information displayed in the communication status bar is useful in the troubleshooting process.



The *Communication Status Bar* consists of the following components:

Component	Description
1st	<u>Message area</u> — Used to display program activity messages during report transmission and receipt.
2nd	<u>Received Data Indicator</u> — Monitors the receipt of report data by displaying the total number of bytes being received for each report.
3rd	<u>Path to Server File</u> — Reflects the path to the Server File.
4th	<u>Activity Timer</u> — Shows the connection time..
5th	<u>Connection Type</u> — Displays the type of connection currently being used. Options are: <ul style="list-style-type: none"> ◆ If TCP/IP connection this message will display “LAN” ◆ If Modem connection, this message displays the name of the modem currently being used for communications.

5.6 Viewing Logs and Reports

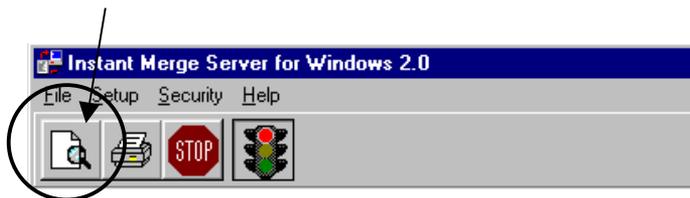
Viewing logs and reports is accomplished with simple menu choices or button clicks. For example, to view *Reports*, the *Error Log*, or the *Transaction Log* from the *File Menu*, just “click” on your desired option.

REMEMBER: The *View* option will display the report of the “active” customer in the *Report Status Window*. This is the customer identified by the  beside their name.



“Clicking” *View Error Log* or *View Trans Log* will display the error or transaction logs respectively. These have been described earlier in this chapter.

You may also choose to view a returned report by “clicking” on the *Print Preview Button* located on the *Button Bar*.



REMEMBER: This option will display the report of the “active” customer in the *Report Status Window*. This is the customer identified by the  beside their name.

5.6.1 Print Preview Window

All reports and logs are displayed in the *Print Preview* Window. This window has some easy-to-use, yet very powerful features. For our example, we will discuss a sample credit report for customer Charlie Credco

 CREDCO INSTANT MERGE DECISION MAKER 01/27/99 Ref: 0-00000-000000-000
 Prepared for: LOANFINDER INC. Acct: 12345
 Repositories: EFX-I, XPM-I, TUC-I Reprint: 02/05/99 Notes: NOTES FIELD

 Sub: CREDCO, CHARLIE R. Sm: 111-22-3333 Age: 38
 Cur Addr: 2865 SE 101ST AV, PORTLAND, DE 97011

SUMMARY

ACCOUNT DISTRIBUTION		Balance		Payments	CURRENT STATUS (tradelines)					
Account Type	Count				Cur	Clsd	Unit	30	60	90+
Real Estate	1	\$94,312	\$962		1	-	-	-	-	-
Installment	5	\$10,332	\$338		2	3	-	-	-	-
Revolving	9	\$0	\$0		9	-	-	-	-	-
Other	1	\$106	\$0		-	-	-	-	-	1
Total	16	\$104,750	\$1,300		12	3	-	-	-	1

INQUIRIES PUBLIC RECORDS HISTORICAL DELINQUENCIES (count)

6 Month Total	0	EFX	1	Account Type	LastDtg	30	60	90+
Elim. same day	-	XPM	0	Real Estate		-	-	-
Adjusted Total	0	TUC	2	Installment	07/94	1	1	-
New Trades (6 mths)	0	Last 2yrs N		Revolving	01/95	2	-	-
				Other	08/90	-	-	1
Oldest Trd: 06/83		On File: 02/78		Total		3	1	1

BUREAU SCORE INFORMATION

EFX Point Score not provided.
 XPM Point Score not provided.
 TUC Point Score not provided.

1 of 4 Zoom: 100

The report is displayed in the *Print Preview* window. The current page number of the report is shown on the *Print Preview* tool bar, at the bottom of the window.



Additional functions can also be selected from the tool bar.



Click this icon to move to the beginning of the report file.



Click this icon to move one page to the left in the report file.



Click this icon to move to the end of the report file.



Click this icon to move one page to the right in the report file.



Use the *Zoom* drop down text box to enlarge or reduce the size of the displayed report. You can use the Scroll Bar at the bottom of the screen to move “left” or “right” to see more of the transaction log.



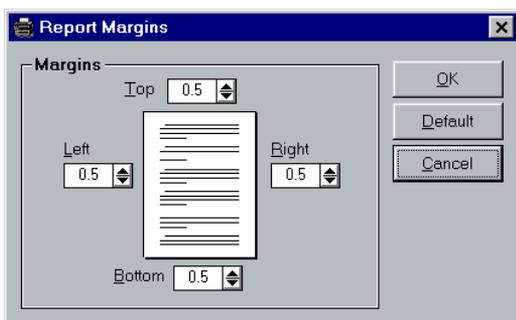
Click on the printer icon to print the report on your default printer.



Click on this icon to close the *Print Preview* window and return to **Instant Merge Server for Windows**..



Click this icon to adjust the margins for your printed report.



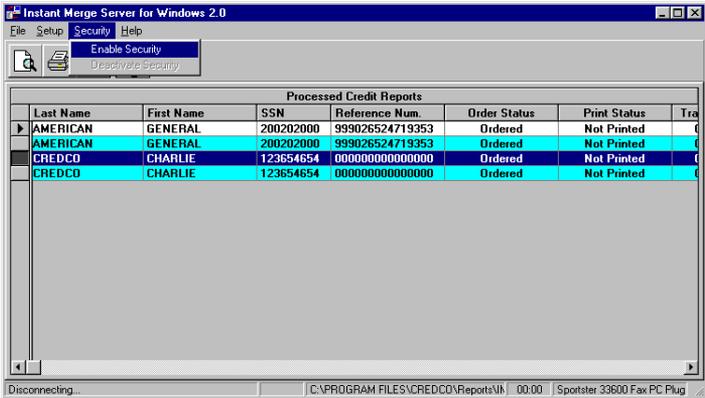
Use the margin windows to adjust the top, bottom, left, or right margins. When you are finished, click **OK** to save your changes and exit. Click **Cancel** to exit without saving your changes. To restore your margin settings to the default system margins (1/2”), click the **Default** button.

You may also move the visible portion of the report within the *Print Preview* window by using the horizontal or vertical scroll bars that may be visible above the *Print Preview* tool bar at the bottom of the report, or along the right side of the window. Simply click on the “up”, “down”, “left”, or “right” arrow to move the report in the direction you desire.

Another, faster method is to simply place your mouse cursor in the middle of the report and press and hold the left mouse button. You can now move the visible portion in any direction available to you. Notice that as you move the report, the scroll bar location indicator moves at the same time.

6 Security and User Administration

Instant Merge Server for Windows provides a *Security* function that protects access to the **Instant Merge Server for Windows** program. This function allows the system administrator and multiple users to be setup with user identifications and passwords. In addition, add, delete, and update permissions can be allowed or disallowed for each user.



6.1 Enabling the Security Function

In order to enable the Security function, you must access the **Instant Merge Server Security** window and set up user identifications, passwords, and privileges.



“Click” the *Enable Security* menu choice to open the **Instant Merge Server Security** window and let you configure your security system.

6.2 Adding the System Administrator

When the **Instant Merge Server Security** window is first displayed, notice that the *Administrator* option button is the only one you can select. Simply “click” on it to add a ● to the Administrator button and a ✓ to the *Add*, *Delete*, and *Update* check boxes.



To finish setting up the user identification, password, and permissions for the system administrator, follow these simple steps:

- Step 1:** USERID: Enter the system administrator’s user identification in the *UserID* text box.
- Step 2:** PASSWORD: Enter the system administrator’s password in the *Password* text box.
- Step 3:** VERIFY: To verify the password, re-enter the password in the *Verify* text box.
- Step 4:** PRIVELEGES: Ensure that the system administrator has add, delete, and update privileges. “Click” on the *Add*, *Delete*, and *Update* check boxes, so that a ✓ appears in each box.
- Step 5:** SAVE: Click on *Save* to save the information.

After the information is saved, you can access all of the other buttons at the bottom of the window.

Button	Action
<i>New</i>	Displays a blank <i>Instant Merge Security</i> window
<i>Delete</i>	Deletes the currently displayed user
<i>Save</i>	Saves the information entered in the window
<i>Cancel</i>	Cancel the window and discards unsaved information
<i>View Password</i>	Displays the password in the <i>Password</i> text box
<i>Exit</i>	Exits the <i>Instant Merge Security</i> window

The *Security* window has a Scroll Bar at the bottom of the window to allow you to administer the users by simply scrolling through the users' records.



NOTE: The UserID name is displayed in the center of the Scroll Bar for your convenience.

6.3 Adding Users

Additional **Instant Merge Server for Windows** users can be added through the **Instant Merge Server Security** window. Simply “click” on the *Maintain Security* menu option on the *Security* menu to activate the **Instant Merge Server Security** window.



Then follow these simple steps:

- Step 1:** **NEW:** Click on the *New* button on the **Instant Merge Security** window. A blank window is displayed.
- Step 2:** **USERID INFO:** Enter the new user identification, password, and the access privileges you want this user to have.
- Step 3:** **SAVE:** “Click” on *Save* to save the information.
- Step 4:** **CONTINUE:** Continue to add users by clicking on *New*, entering the user information, and clicking on *Save*.
- Step 5:** **EXIT:** When you have entered all users, click on *Exit* to close the **Instant Merge Server Security** window.

6.4 Deleting Users

To delete a user from the system simply “click” on the *Maintain Security* menu option on the *Security* menu to activate the **Instant Merge Server Security** window, and follow these simple steps:



Step 1: FIND USER: Use the scroll bar at the bottom of the **Instant Merge Server Security** window to scroll to the user you want to delete.



Step 2: DELETE: Press the *Delete* button.



Step 3: CONFIRM: You will be asked if you really want to delete this security record. If you do, “click” on the **OK** button, if not then “click” the *Cancel* button.



6.5 Deactivate Security

To deactivate security, simply “click” on the *Deactivate Security* menu option on the *Security* menu to activate the **Instant Merge Server Security** window.



You will be warned that this will permanently remove all security from the system.



NOTE: Removing security from your system will require that you start over entering users and their access the next time you want to add security back to your system.

To permanently remove security from your system, “click” the **Yes** button, otherwise “click” the **No** button to keep your present security configuration.

The complete removal of security from your system will be confirmed with the following window.



“Click” on the **OK** button to continue.

6.6 Working with Security Enabled

Once the Security function is setup and activated, **Instant Merge for Windows** displays the *Security* window each time the software is started.

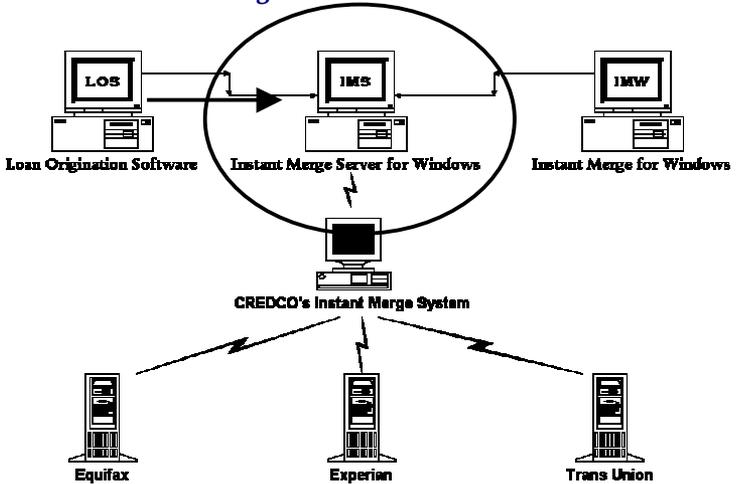


You must enter your user identification and password to access the **Instant Merge for Windows** program.

7 Server File Formats

An additional method of entering data into *Instant Merge* is available for Local Area Network (LAN) and database users. Files, conforming to one of the various **Instant Merge Server** file formats, can be input to **Instant Merge** through the **Instant Merge Server for Windows** software.

The Server software permits **Instant Merge** to function as a file server on a LAN, or to process database files prepared by software other than **Instant Merge**.



7.1 Formatting the Server File

Formatting the server file correctly is extremely important. In order for the data to be accepted and processed by **Instant Merge Server**, the data file must be in the correct format. The following list provides file format guidelines for Format A, Format B, Format C, and Format E. Format guidelines for Format D, which is significantly different, are covered separately in *Format D (ECHO Format)* later in this chapter.

- ◆ Each field in the file, including the last field of each record, *must* terminate with a comma.
- ◆ Each field can be surrounded by quotation marks, although quotation marks are not necessary.
- ◆ All characters within a field *must* be printable ASCII characters and conform to the same data entry standards as the **Instant Merge for Windows Client Request Window** screen. For more information on these standards, please refer to the **Instant Merge for Windows Client User Guide**.
- ◆ Carriage returns or other unprintable ASCII characters can be included in the file. **Instant Merge** ignores them.
- ◆ A server file can contain from one to 999 entries.
- ◆ All fields, whether labeled mandatory, optional, or unused, *must* be included. Only mandatory fields must contain data. All other fields can be null (empty) with a comma as a delimiter.

NOTE: Five server file formats are available for use with **Instant Merge Server**. If you are currently using a format conforming to an earlier version of the **Instant Merge** software, you should contact Technical Support to determine if you can continue its use or if you need to conform to one of the other **Instant Merge Server** file formats.

7.2 Format A (Versions 1.1 through 1.3.1)

The server file format for earlier versions of the Instant Merge software is shown below. Table 7-1 describes each field length, description, and whether an entry in that field is mandatory, optional, or unused. *Notice that in the example shown, a comma separates each field.* If a field is null, a comma must still be used (as a delimiter) to mark the position of that field.

LASTNAME, FIRSTNAME, MIDDLENAME, GENERATION, SPOUSEFNAME, STREETORBOXNUMBER, STREETNAM, STREETTYPE, CITY, STATE, ZIP, FORMERSTNUMBER, FORMERSTRNAM, FORMERSTTYPE, FORMERCITY, FORMERSTATE, FORMERZIP, SSN, REPORTTYPE, SPOUSEMIDNAM, SPOUSESSN, NOTES, EMPLOYMENT, AGE, PHONENUM, APT#, FORMERAPT#, EFX/N, UNUSED, UNUSED, TUCY/N, XPNY/N,

NOTE: Do *not* order a joint report on applicants who are not married.

Field #	Field Length	Description	Notes
1	25	Last Name	Mandatory.
2	15	First Name	Mandatory.
3	1	Middle Initial	Optional.
4	2	Generation	Optional.
5	15	Spouse First Name	Optional unless a joint request.
6	10	Street/Box Number	Mandatory.
7	16	Street Name	Mandatory- Enter MILITARY if a military address, RR if Rural Route, BOX if a P.O. Box.
8	2	Street Type	Unused.
9	20	City	Mandatory.
10	2	State	Mandatory. Must agree with ZIP Code.
11	5	ZIP Code	Mandatory. Must agree with State.
12	10	Former Street/Box Number	Optional unless any other former address information is present.

Table 7-1. Format A Fields

Field #	Field Length	Description	Notes
13	16	Former Street Name	Optional unless any other former address information is present.
14	2	Former Street Type	Optional.
15	20	Former City	Optional unless any other former address information is present.
16	2	Former State	Optional unless any other former address information is present . Must agree with Former ZIP Code.
17	5	Former ZIP Code	Optional unless any other former address information is present. Must agree with Former State.
18	11	Social Security Number	Mandatory. (Dashes are optional.)
19	1	Report Type	Optional. I =Individual, J =Joint
20	1	Spouse Middle Initial	Optional.
21	11	Spouse Social Security Number	Optional unless spouse data is present. (Dashes are optional.)
22	72	Notes Field	Optional. Use this field to enter the Instant Merge Reference Number when reordering an existing report.
23	30	Employment	Unused.
24	4	Age	Optional, enter A-yy or yy.
25	8	Phone Number	Unused.
26	5	Apartment Number	Optional.
27	5	Former Apartment Number	Optional.
28	1	EFX	Optional. Mark Y to override default.
29	1	Unused	Unused.
30	1	Unused	Unused.
31	1	TUC	Optional. Mark Y to override default.
32	1	XPN	Optional. Mark Y to override default.

Table 7-1. Format A Fields (continued)

7.3 Format B (Version 1.4.1)

Format B, for **Instant Merge** 1.4.1, introduced two new features. The first feature allows the spouse's last name to be imported by Instant Merge. This allows married people who have different last names to obtain joint credit reports. The field used for this is Field #23, the *Employment* field (which was unused) in Format A.

NOTE: Do *not* order a joint report on applicants who are not married.

The second feature introduced the use of multiple Profile Identifications. This allows ordering reports under different account numbers or different report formats. The Profile Identifications are setup in the Instant Merge configuration when the account is opened.

Table 7-2 describes each field length, description, and whether an entry in that field is mandatory, optional, or unused. Notice that in the example shown, a comma separates each field. If a field is null, a comma must still be used (as a delimiter) to mark the position of that field.

```
LASTNAME, FIRSTNAME, MIDDLENAME, GENERATION,
SPOUSEFNAME, STREETORBOXNUMBER, STREETNAM, STREETTYPE,
CITY, STATE, ZIP, FORMERSTNUMBER, FORMERSTNAM,
FORMERSTTYPE, FORMERCITY, FORMERSTATE, FORMERZIP, SSN,
REPORTTYPE, SPOUSEMIDNAM, SPOUSESSN, NOTES, SPOUSELNAME,
AGE, PHONENUM, APT#, FORMERAPT#, EFX/N, PORFILEID,
UNUSED, TUCY/N, XPNY/N,
```

Field #	Field Length	Description	Notes
1	25	Last Name	Mandatory.
2	15	First Name	Mandatory.
3	1	Middle Initial	Optional.
4	2	Generation	Optional.
5	15	Spouse First Name	Optional unless a joint request.
6	10	Street/Box Number	Mandatory.
7	16	Street Name	Mandatory- Enter MILITARY if a military address, RR if Rural Route, BOX if a P.O. Box.
8	2	Street Type	Unused.
9	20	City	Mandatory.
10	2	State	Mandatory. Must agree with ZIP Code.
11	5	ZIP Code	Mandatory. Must agree with State.
12	10	Former Street/Box Number	Optional unless any other former address information is present.
13	16	Former Street Name	Optional unless any other former address information is present.
14	2	Former Street Type	Optional.
15	20	Former City	Optional unless any other former address information is present.
16	2	Former State	Optional unless any other former address information is present . Must agree with Former ZIP Code.
17	5	Former ZIP Code	Optional unless any other former address information is present . Must agree with Former State.
18	11	Social Security Number	Mandatory. (Dashes are optional.)
19	1	Report Type	Optional. I =Individual, J =Joint
20	1	Spouse Middle Initial	Optional.

Table 7-2. Format B Fields

Field #	Field Length	Description	Notes
21	11	Spouse Social Security Number	Optional unless spouse data is present. (Dashes are optional.)
22	72	Notes Field	Optional. Use this field to enter the Instant Merge Reference Number when reordering an existing report.
23	25	Spouse Last Name	Optional.
24	4	Age	Optional, enter A-yy or yy.
25	8	Phone Number	Unused.
26	5	Apartment Number	Optional.
27	5	Former Apartment Number	Optional.
28	1	EFX	Optional. Mark Y to override default.
29	1	Profile ID	Mandatory. Values are 1-9 and A-Z . If this field is left blank, the Profile ID defaults to 1.
30	1	Unused	Unused.
31	1	TUC	Optional. Mark Y to override default.
32	1	XPN	Optional. Mark Y to override default.

Table 7-2. Format B Fields (continued)

7.4 Format C (Version 1.5.0)

Format C, for **Instant Merge** Version 1.5.0, includes all the features of Format A and Format B, and introduces two new features. The first new feature allows for specifying the name of the output file. The *OUTPUTFILE* field (field number 30, previously unused) accepts 32 characters for a DOS-convention path and filename. If the field is left blank, **Instant Merge** names the output file in the format of **RPT11.###**, where **###** is a three-digit number assigned by **Instant Merge**.

NOTE: Do *not* specify RPT11.### in the *OUTPUTFILE* field. This filename is reserved for use by **Instant Merge**.

The second new feature involves the *PRINT* field. Entering a **Y** in this field selects the accompanying file for printing upon completion of processing. If the field is left blank, the report does not print automatically.

In addition to the two new features described above, Format C includes seven new fields. These fields are reserved for future use and are to be left blank.

Table 7-3 describes each field length, description, and whether an entry in that field is mandatory, optional, or unused. Notice that in the example shown, a comma separates each field. If a field is null, a comma must still be used (as a delimiter) to mark the position of that field.

LASTNAME, FIRSTNAME, MIDDLENAME, GENERATION,
SPOUSEFNAME, STREETORBOXNUMBER, STREETNAM, STREETTYPE,
CITY, STATE, ZIP, FORMERSTNUMBER, FORMERSTNAM,
FORMERSTTYPE, FORMERCITY, FORMERSTATE, FORMERZIP, SSN,
REPORTTYPE, SPOUSEMIDNAM, SPOUSESSN, NOTES, SPOUSELNAME,
AGE, PHONENUM, APT#, FORMERAPT#, EFX/N. PROFILEID,
OUTPUTFILE, TUCY/N, XPNY/N, PRINT, UNUSED, UNUSED, UNUSED,
UNUSED, UNUSED, UNUSED, UNUSED,

NOTE: Do *not* order a joint report on applicants who are not married.

Field #	Field Length	Description	Notes
1	25	Last Name	Mandatory.
2	15	First Name	Mandatory.
3	1	Middle Initial	Optional.
4	2	Generation	Optional.
5	15	Spouse First Name	Optional unless a joint request.
6	10	Street/Box Number	Mandatory.
7	16	Street Name	Mandatory- Enter MILITARY if a military address, RR if Rural Route, BOX if a P.O. Box.
8	2	Street Type	Unused.
9	20	City	Mandatory.
10	2	State	Mandatory. Must agree with ZIP Code.
11	5	ZIP Code	Mandatory. Must agree with State.
12	10	Former Street/Box Number	Optional unless any other former address information is present.
13	16	Former Street Name	Optional unless any other former address information is present.
14	2	Former Street Type	Optional.
15	20	Former City	Optional unless any other former address information is present.
16	2	Former State	Optional unless any other former address information is present . Must agree with Former ZIP Code.
17	5	Former ZIP Code	Optional unless any other former address information is present. Must agree with Former State.
18	11	Social Security Number	Mandatory. (Dashes are optional.)
19	1	Report Type	Optional. I =Individual, J =Joint
20	1	Spouse Middle Initial	Optional.

Table 7-3. Format C Fields

Field #	Field Length	Description	Notes
21	11	Spouse Social Security Number	Optional unless spouse data is present. (Dashes are optional.)
22	72	Notes Field	Optional. Use this field to enter the Instant Merge Reference Number when reordering an existing report.
23	25	Spouse Last Name	Optional.
24	4	Age	Optional, enter A-yy or yy.
25	8	Phone Number	Unused.
26	5	Apartment Number	Optional.
27	5	Former Apartment Number	Optional.
28	1	EFX	Optional. Mark Y to override default.
29	1	Profile ID	Mandatory. Values are 1-9 and A-Z . If this field is left blank, the Profile ID defaults to 1 .
30	32	Output Filename	Optional. Enter the output filename (can include drive and path name). Use DOS file and path naming conventions. If this field is left blank, the system uses the default output filename RPT11.### , where ### represents a three-digit number assigned by the system.
31	1	TUC	Optional. Mark Y to override default.
32	1	XPN	Optional. Mark Y to override default.
33	1	Mark for Print	Optional. Mark Y to mark this file for printing.
34	Undefined	(Reserved for Future Use)	

Table 7-3. Format C Fields (continued)

Field #	Field Length	Description	Notes
35	Undefined	(Reserved for Future Use)	
36	Undefined	(Reserved for Future Use)	
37	Undefined	(Reserved for Future Use)	
38	Undefined	(Reserved for Future Use)	
39	Undefined	(Reserved for Future Use)	
40	Undefined	(Reserved for Future Use)	

Table 7-3. Format C Fields (continued)

7.5 Format D (ECHO Format)

Instant Merge Version 1.6.0 introduced Format D, ECHO Format. The server file format for Format D differs significantly from the other **Instant Merge Server** file formats. The following paragraphs discuss the coding structure and requirements for Format D.

7.5.1 Coding Structure

The eight-byte code identifying the data field is composed of four elements: a two-byte data class identifier, a three-byte field identifier, a two-byte occurrence identifier, and a one-byte applicant identifier. The data class identifier indicates what type of information is contained in the field, the field identifier specifically identified the field, the occurrence identifier allows for multiple values within the field, and the applicant identifier indicates whether the information is related to the borrower (**0**) or co-borrower (**1-9, A-Z**).

The following list provides additional information about the requirements of the ECHO format server file.

- ◆ Maximum field data length equals 111.
- ◆ The 8-byte field code and a space always precede the field data.
- ◆ A new line (<nl>) always terminates the field data.
- ◆ Field data length and record lengths are variable unless otherwise specified.
- ◆ Truncation required as a result of incompatibilities of the sending systems field length and First American CREDCO's Instant Merge field length is done at First American CREDCO's discretion.
- ◆ All data coding, including numeric, is lower order ASCII values.
- ◆ All special alphanumeric validation strings are in uppercase characters only.
- ◆ An 8-byte Beginning of Record (BOR) label (#####) and a new line (<nl>) precedes each record.
- ◆ An 8-byte End of Record (EOR) label (%&%&%&%&%&%) terminates each data record. A numeric value equal to the total number of bytes between the BOR and EOR follows the EOR. A new line (<nl>) terminates the entire record.

Notice that in the example shown, a new line terminates each data field and a final new line terminates the entire record.

```
##$##$##$<nl>
TS220000 NOTES<nl>
BD110000 LASTNAME, FIRSTNAME MIDINITIAL, TITLE<nl>
BD120000 AGE<nl>
BD140000 SSN<nl>
BD213010 STREETORBOXNUMBER STREETNAME<nl>
BD214010 CITY<nl>
BD215010 STATE<nl>
BD216010 ZIP<nl>
CB110001 SPOUSELASTNAME,
          SPOUSEFIRSTNAME SPOUSEMIDINITIAL, TITLE<nl>
CB120001 SPOUSEAGE<nl>
CB140001 SPOUSESSN<nl>
BD213020 FORMERSTNUMBER FORMERSTNAME<nl>
BD214020 FORMERCITY<nl>
BD215020 FORMERSTATE<nl>
BD216020 FORMERZIP<nl>
XX310000 PROFILEID<nl>
XX320000 OUTPUTFILE<nl>
XX330000 PRINT<nl>
XX340000 DELETE<nl>
XX630000 EFX/N<nl>
XX640000 TUCY/N<nl>
XX650000 XPNY/N<nl>
%&%&%&%& NUMBEROFBYTES<nl>
```

7.5.2 Format D Fields

Table 7-4 through Table 7-13 describe the Format D data fields used by **Instant Merge**.

CODE	FIELD	MAX LENGTH	VALIDATIONS
TS220000 or TS160000	Notes	20	
If TS220000 exists, Instant Merge uses that segment. If TS220000 does not exist, Instant Merge looks for TS160000 and, when available, uses that segment.			

Table 7-4. Notes - Format D

CODE	FIELD	MAX LENGTH	VALIDATIONS
BD110000	Name	40	Last,First Middle Initial,Title (w/commas)
BD120000	Age	3	
BD140000	Social Security Number	9	

Table 7-5. Borrower Data - Format D

CODE	FIELD	MAX LENGTH	VALIDATIONS
BD213010	Street	30	Each component of this field is separated by a space. See text following Table 7-6, Present Address.
BD214010	City	18	
BD215010	State	2	
BD216010	ZIP	9	

Table 7-6. Present Address - Format D

The information contained in BD213010 depends on the applicant's address type (Normal, Post Office Box, or Rural Route). Notice that each component of this field is separated by a space.

7.5.3 Normal Address

When the address is a *Normal* address, the field format is:

*HouseNbr Direction StreetName Thoroughfare APTA
APTNumber*

Where:

HouseNbr = House Number
Direction = Valid direction
StreetName = Name of street
Thoroughfare = Valid thoroughfare
APTA = Abbreviation of apartment.
 Valid abbreviations are:
AP
APT
SUITE
APTNumber = Apartment number

The *Direction*, *Thoroughfare*, *APTA*, and *APTNumber* components are optional.

EXAMPLES:

1234 South Main Street AP 5
 1234 Main Street AP 5
 1234 Main Street APT 5
 1234 Main Street SUITE 5
 1234 Main Street
 1234 South Main AP5
 1234 South Main
 1234 South Main Street

7.5.4 Post Office Box Address

When the address is a *Post Office Box* address, the field format is:

POBA BoxNumber

Where:

POBA = Abbreviation of Post Office Box
Valid abbreviations are:
P.O. Box
P. O. BOX
P.O.BOX
PB
BOX
PO BOX
POBOX
POB
P.O.B.
P. O. B.
POST OFFICE BOX

BoxNumber = Box number

EXAMPLES:

P.O. BOX 12
P. O. BOX 12
P.O.BOX12
PB 12
BOX 12
PO BOX 12
POBOX 12
POB 12
P.O.B. 12
P. O. B. 12
POST OFFICE BOX 12

7.5.5 Rural Route Address

When the address is a *Rural Route* address, the field format is:

RR RRNumber POBA BOXNumber APTA APTNumber

Where:

RR = Abbreviation of Rural Route
Valid abbreviations are:

RR
ROUTE
R.R.
R. R.
RURAL ROUTE
RURALROUTE
RT
R.T.
R. T.

RRNumber = Rural Route number

POBA = Abbreviation of Post Office Box
Valid abbreviations are:

P.O. BOX
P. O. BOX
P.O.BOX
PB
BOX
PO BOX
POBOX
POB
P.O.B.
P. O. B.
POST OFFICE BOX

BOXNumber = Box Number

APTA = Abbreviation of apartment
Valid abbreviations are:

AP
APT
SUITE

The *APTA* and *APTNumber* are optional fields.

EXAMPLES:

RR 5 P. O. BOX 12
 ROUTE 5 P. O. BOX 12 AP 35
 R.R. 5 P. O. BOX 12 APT 35
 R. R. 5 P.O. BOX 12 SUITE 200
 RURAL ROUTE 5 P.O. BOX 12
 RURALROUTE 5 POB 12
 RT 5 P.O. BOX 12
 R.T. 5 P.O. BOX 12
 R. T. 5 P. O. BOX 12

CODE	FIELD	MAX LENGTH	VALIDATIONS
CB110001	Name	40	Last,First Middle Initial,Title (w/commas)
CB120001	Age	3	
CB140001	Social Security Number	9	
Multiple co-borrowers are identified by incrementing the last digit in the code field. However, Instant Merge uses only the co-borrower identified in this table.			

Table 7-7. Co-borrower Data - Format D

CODE	FIELD	MAX LENGTH	VALIDATIONS
BD213020	Street	30	Each component of this field is separated by a space. Refer to Table 7-6, Present Address for information on valid component values.
BD214020	City	18	
BD215020	State	2	
BD216020	ZIP	9	
Multiple former addresses are identified by incrementing the seventh digit in the code field. However, Instant Merge uses only the former address identified in this table.			

Table 7-8. Former Address - Format D

The information contained in BD213020 depends on the applicant's former address type (Normal, Post Office Box, or Rural Route). Refer to Table 7-6, Present Address for information on valid components for this field.

The report type (individual or joint) is determined by the number of applicants in the request. If there is only one applicant, the report type is set to **I** (Individual). If there is more than one applicant, the report type is set to **J** (Joint).

NOTE: Do *not* order a joint report on applicants who are not married.

CODE	FIELD	MAX LENGTH	VALIDATIONS
XX310000	Profile ID	1	Values are 1-9 and A-Z. If this field is left blank, the Profile ID defaults to 1.

Table 7-9. Profile Identification - Format D

The Profile ID contained XX310000 must be one of the profiles setup by First American CREDCO in your customer options. The report type (such as **F1**, **RD**, etc.) is defined in the Profile ID. If the code for this field is transmitted, a value must be entered. If this field is not transmitted, the Profile ID defaults to **1**.

CODE	FIELD	MAX LENGTH	VALIDATIONS
XX320000	Output Filename	32	Enter the output filename (can include drive and path name).

Table 7-10. Output Filename - Format D

The information contained in XX320000 is used to define a specific output filename. If the code for this field is transmitted, an output filename must be entered. If this field is not transmitted, the system uses the default output filename **RPT11.###**, where **###** represents a three-digit number assigned by the system.

CODE	FIELD	MAX LENGTH	VALIDATIONS
XX330000	Mark for Print		Optional. Valid entries are: Y=Yes. Mark this file for printing. N=No. Do not mark this file to print automatically.

Table 7-11. Automatic Print - Format D

When a **Y** is entered in XX330000, the file is marked to automatically print the returned report. When an **N** is entered in this field, the file is marked to not automatically print the returned report.

If the automatic print option is set to **Y** in the *Server Options* screen, the automatic print option overrides this field.

CODE	FIELD	MAX LENGTH	VALIDATIONS
XX340000	Mark for Deletion		Optional. Valid entries are: Y=Yes. Delete the inquiry and report files after printing. S=Delete the inquiry file only (this does not delete the report file). N=No. Do not delete the inquiry and report files after printing.

Table 7-12. Automatic Delete - Format D

When a **Y** is entered in XX340000, the file is marked to automatically delete the inquiry and report files after the report is printed. When an **N** is entered in this field, the file is marked to not automatically delete the inquiry and printed report. Entering an **S** deletes only the inquiry file: the report file is retained on your system.

CODE	FIELD	MAX LENGTH	VALIDATIONS
XX630000	EFX		Optional. Valid entries are: Y =Yes N =No Mark Y to specifically order access for this repository.
XX640000	TUC		Optional. Valid entries are: Y =Yes N =No Mark Y to specifically order access for this repository.
XX650000	XPN		Optional. Valid entries are: Y =Yes N =No Mark Y to specifically order access to this repository.
XX660000	Number of Repositories		Optional. Values are 1, 2, or 3. This field cannot be used when any combination of XX630000, XX640000, XX650000 is used.

Table 7-13. Repository Selection Override - Format D

NOTE: The ability to use a specific number of repositories or specific repository access varies from customer to customer. You may not have the ability to use these options.

When a **Y** is entered in XX630000, XX640000, or XX650000, do not use XX660000. The individual repository fields (*EFX*, *XPN*, *TUC*) are mutually exclusive of the *Number of Repositories* field.

7.6 Format E (Version 1.7.0)

Format E, for **Instant Merge** Version 1.7.0 (and above), includes all the features of Format A, Format B, and Format C, and introduces two new features. The first new feature uses Field #34 and allows for the file to be marked for deletion after printing. The second new feature allows for selection of the number of repositories to be accessed. This feature uses Field #35. If there is a conflict between the number of repositories entered in this field and the entries in the *EFX*, *XPN*, and *TUC* fields, the *EFX*, *XPN*, and *TUC* fields override the number of repositories entered in Field #35.

Table 7-14 describes each field length, description, and whether an entry in that field is mandatory, optional, or unused. Notice that in the example shown, a comma separates each field. If a field is null, a comma must still be used (as a delimiter) to mark the position of that field.

LASTNAME, FIRSTNAME, MIDDLENAME, GENERATION, SPOUSENAME, STREETORBOXNUMBER, STREETNAM, STREETTYPE, CITY, STATE, ZIP, FORMERSTNUMBER, FORMERSTNAM, FORMERSTTYPE, FORMERCITY, FORMERSTATE, FORMERZIP, SSN, REPORTTYPE, SPOUSEMIDNAM, SPOUSESSN, NOTES, SPOUSELNAME, AGE, PHONENUM, APT#, FORMERAPT#, EFX/N, PROFILEID, OUTPUTFILE, TUCY/N, XPNY/N, PRINT, DELETE, #REPOSITORIES, UNUSED, UNUSED, UNUSED, UNUSED, UNUSED, UNUSED,

NOTE: Do not order a joint report on applicants who are not married.

Field #	Field Length	Description	Notes
1	25	Last Name	Mandatory.
2	15	First Name	Mandatory.
3	1	Middle Initial	Optional.
4	2	Generation	Optional.
5	15	Spouse First Name	Optional unless a joint request.
6	10	Street/Box Number	Mandatory.
7	16	Street Name	Mandatory- Enter MILITARY if a military address, RR if Rural Route, BOX if a P.O. Box.
8	2	Street Type	Unused.

Table 7-14. Format E Fields

Field #	Field Length	Description	Notes
9	20	City	Mandatory.
10	2	State	Mandatory. Must agree with ZIP Code.
11	5	ZIP Code	Mandatory. Must agree with State.
12	10	Former Street/Box Number	Optional unless any other former address information is present.
13	16	Former Street Name	Optional unless any other former address information is present.
14	2	Former Street Type	Optional.
15	20	Former City	Optional unless any other former address information is present.
16	2	Former State	Optional unless any other former address information is present . Must agree with Former ZIP Code.
17	5	Former ZIP Code	Optional unless any other former address information is present. Must agree with Former State.
18	11	Social Security Number	Mandatory. (Dashes are optional.)
19	1	Report Type	Optional. I =Individual, J =Joint
20	1	Spouse Middle Initial	Optional.
21	11	Spouse Social Security Number	Optional unless spouse data is present. (Dashes are optional.)
22	72	Notes Field	Optional. Use this field to enter the Instant Merge Reference Number when reordering an existing report.

Table 7-14. Format E Fields (continued)

Field #	Field Length	Description	Notes
23	25	Spouse Last Name	Optional.
24	4	Age	Optional, enter A-yy or yy.
25	8	Phone Number	Unused.
26	5	Apartment Number	Optional.
27	5	Former Apartment Number	Optional.
28	1	EFX	Optional. Mark Y to override default.
29	1	Profile ID	Mandatory. Values are 1-9 and A-Z . If this field is left blank, the Profile ID defaults to 1 .
30	32	Output Filename	Optional. Enter the output filename (can include drive and path name). Use DOS file and path naming conventions. If this field is left blank, the system uses the default output filename RPT11.###, where ### represents a three-digit number assigned by the system.
31	1	TUC	Optional. Mark Y to override default.
32	1	XPN	Optional. Mark Y to override default.
33	1	Mark for Print	Optional. Mark Y to mark this file for printing.
34	1	Mark for Deletion	Optional. Mark Y to delete the inquiry and report files after printing. Mark S to delete the inquiry file only (this does not delete the report file).

Table 7-14. Format E Fields (continued)

Field #	Field Length	Description	Notes
35	1	Number of Repositories	Optional. Values are 1-3 .
36	Undefined	(Reserved for Future Use)	
37	Undefined	(Reserved for Future Use)	
38	Undefined	(Reserved for Future Use)	
39	Undefined	(Reserved for Future Use)	
40	Undefined	(Reserved for Future Use)	

Table 7-14. Format E Fields (continued)

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