

User Guide

# Advanced Fee Tool

(Version 1.0)

CoreLogic®

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## Summary

The Advanced Fee service within the Mercury Network® Secure platform now allows your organization's admin(s) to perform mass updates of fees associated to products/vendors in a more efficient manner, and in real time.

## Sample Templates

\*These are used in step 3 of the export of fee sheet instructions if none are present.



test.xlsx

*(see original in attached files)*

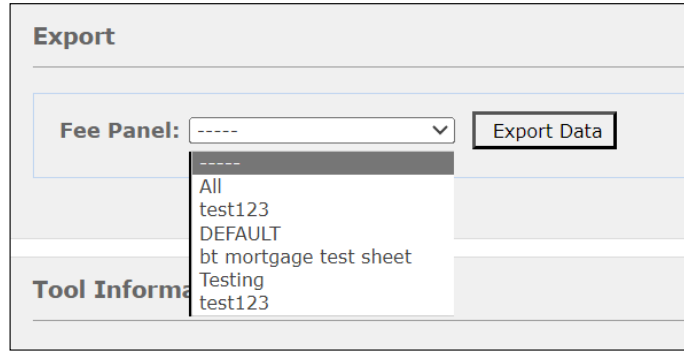
## Overview

Any user in your organization will be able to navigate to the page (Preferences > VMP Client Order Setup > [Advanced Fee](#)), but only the admin, and those designated by their admin, will be able to leverage this new utility. **Please contact your admin to have your appropriate staff enabled for this feature.** If your organization has never leveraged this feature, please contact our Support (mercuryinfo@corelogic.com) or your account representative to have your system set up for this service.

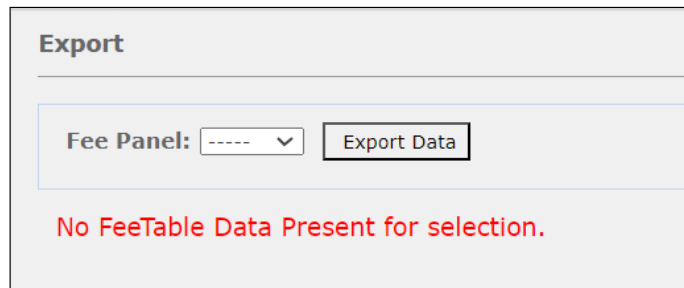
## Instructions

To export your existing setup fee sheets:

1. You will see the list of Fee table sheets that are available to export when you click on the Fee Panel dropdown. From that list, you can select a specific sheet to export or select the "All" option to export all the sheets available into a spreadsheet.
2. When you click, "Export Data" the spreadsheet gets exported.



3. When there is no data present to export, you will receive the error message that says "No FeeTable Data Present for selection."



To import your fee sheet(s):

1. You can upload the fee sheet by clicking on the Browse button.
2. Once the file is selected, two options will be displayed:
  - a. 'Upload Type'
  - AND
  - b. 'Sheet Tab to Process'.

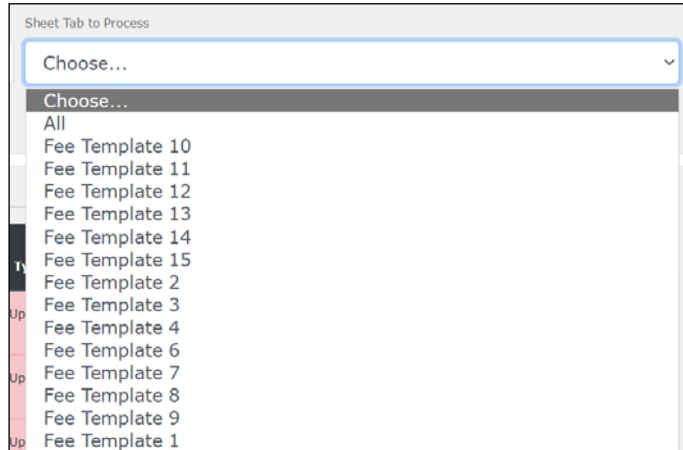
Upload Type:

1. For the Upload Type, select either Full Fee Sheet or Partial Fee Sheet from the dropdown list.

2. If Full Fee Sheet is selected from the dropdown, it indicates that the uploaded spreadsheet should be treated as your entire fee table. If there are rows that have been deleted since the previous submission, you will be prompted to delete these fees from the system.
3. If Partial Fee Sheet is selected, it means the upload process will not attempt to detect any missing fees from the spreadsheet.

Sheet Tab to Process:

1. When the Sheet Tab to Process is selected, you can see the list of different sheets that are available in the spreadsheet which was uploaded. From that list, you can then select a specific sheet to upload or select All option to upload all the sheets available in that spreadsheet and click Submit.



## History

- When the fee sheet is submitted, a new row will be created automatically under the History section that shows the details, and once it is processed, the status will display as, "Completed".

SubmissionID	Date Submitted	Submitted By	Submission Type	Last Updated	Status	Result
2924290d-c9c7-4d5-a239-8f932a1efa9b	01/24/2024 12:47 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:47 PM	Complete	Success
fdc1680f-7762-4a7e-ba9a-98a254624a74	01/24/2024 12:49 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:49 PM	Complete	Missing rows
a93e9e5b-56d2-4142-93c3-722b9f22a07c	01/24/2024 12:53 PM	Brittani Thompson	FeeSheetIncremental	01/24/2024 12:53 PM	Complete	Success
c2bdd2c5-a312-4aa5-a7c6-4628ab68b7b9	01/24/2024 2:23 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 2:23 PM	Complete	Invalid spreadsheet

- If the result is "**Success**" that means the fee sheet had been processed successfully and you will see the detailed results by clicking on that entry.

History

SubmissionID	Date Submitted	Submitted By	Submission Type	Last Updated	Status	Result
2924290d-c9c7-47d5-a239-8f932a1efa9b	01/24/2024 12:47 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:47 PM	Complete	Success
fd1c160f-7762-4a7c-ba9a-98a254624a74	01/24/2024 12:49 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:49 PM	Complete	Missing rows
a93e9e5b-56d2-4142-93c3-722b9f22a07c	01/24/2024 12:53 PM	Brittani Thompson	FeeSheetIncremental	01/24/2024 12:53 PM	Complete	Success
c2bbd2c5-a312-4aa5-a7e6-4628ab68b7b9	01/24/2024 2:23 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 2:23 PM	Complete	Invalid spreadsheet

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2924290d-c9c7-47d5-a239-8f932a1efa9b

### Process Fee Sheet Request

Rows Processed: 1073  
 Rows Total: 1073  
 Sheet Tab # Processed: 1  
 Submitted time: 01/24/2024 12:47 PM  
 Last updated: 01/24/2024 12:47 PM  
 Status: Complete  
 Results: Fee sheet test123 processed successfully

If the result says, **“Missing Rows”**, it means that the fee sheet has been processed successfully, however there are certain rows that are missing in the spreadsheet but are available in the database. You will only see this result if you have selected the Upload Type as “Full Fee Sheet”. You can see the rows that were missing in the spreadsheet by clicking on that entry. By clicking the Delete button, you can remove the missing fee rows in the database that were not listed in the spreadsheet.

History

SubmissionID	Date Submitted	Submitted By	Submission Type	Last Updated	Status	Result
2924290d-c9c7-47d5-a239-8f932a1efa9b	01/24/2024 12:47 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:47 PM	Complete	Success
fd1c160f-7762-4a7c-ba9a-98a254624a74	01/24/2024 12:49 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 12:49 PM	Complete	Missing rows
a93e9e5b-56d2-4142-93c3-722b9f22a07c	01/24/2024 12:53 PM	Brittani Thompson	FeeSheetIncremental	01/24/2024 12:53 PM	Complete	Success
c2bbd2c5-a312-4aa5-a7e6-4628ab68b7b9	01/24/2024 2:23 PM	Brittani Thompson	FeeSheetFullUpdate	01/24/2024 2:23 PM	Complete	Invalid spreadsheet

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For more information, visit [corelogic.com](https://corelogic.com).

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fdc1680f-7762-4a7e-ba9a-98a254624a74

### Process Fee Sheet Request

**Rows Processed:** 1062  
**Rows Total:** 1062  
**Sheet Tab # Processed:** 1  
**Submitted time:** 01/24/2024 12:49 PM  
**Last updated:** 01/24/2024 12:49 PM  
**Status:** Complete

**Results:**

The submitted spreadsheet was missing one or more rows from the previous submission

- WA San Juan
- WA Pend Oreille
- WA Spokane
- WV
- WA Okanogan
- WA Pierce
- WA Skagit
- WA Whatcom
- WA Skamania
- WA Yakima
- WA Mason

Please confirm if you would like to delete these fees

Fee sheet test123 processed successfully

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- If the result says "**Invalid spreadsheet**" that means fee sheet has not been processed successfully. By clicking on that entry, you can see the reason why it failed to process and after making the necessary changes. If you re-upload the fee sheet, it will get processed successfully.
- If you try to upload an invalid file type, then the result shows as Invalid spreadsheet.

**For more information, visit [corelogic.com](https://corelogic.com) or call XXX-XXX-XXXX.**

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