

User Guide

# AMC Allocation Tool

(Version 1.0)

CoreLogic<sup>®</sup>

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## Summary

The AMC Allocations service within the Mercury Network® Secure platform now allows your organization's admin(s) to perform allocations of assignment logic in bulk to make mass updates in a more efficient manner in real time.

## Sample Templates

\*These are used in step 3 of the instructions.



(see originals in attached files)

## Overview

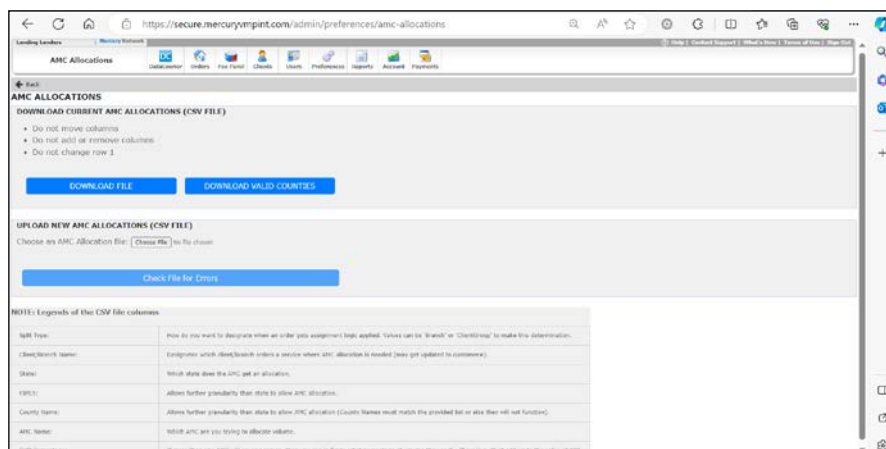
Any user in your organization will be able to navigate to the page (Preferences > VMP Client Order Setup > AMC Allocations), but only the admin and those designated by their admin will be able to leverage this new utility.

**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.

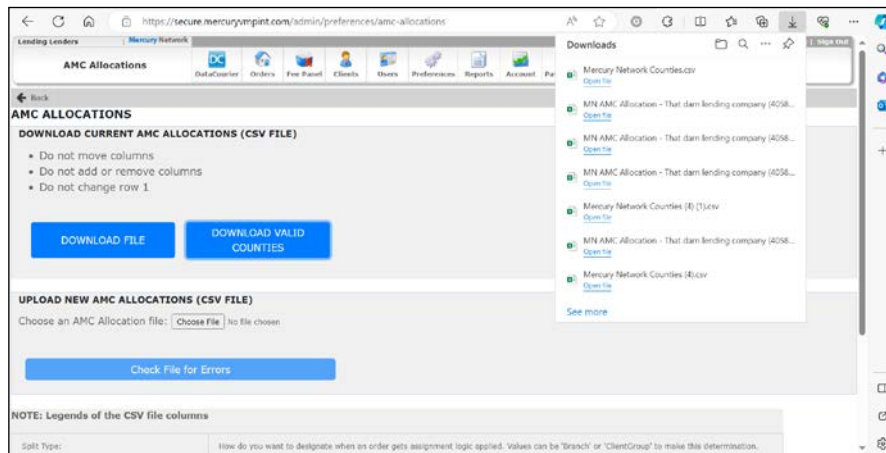
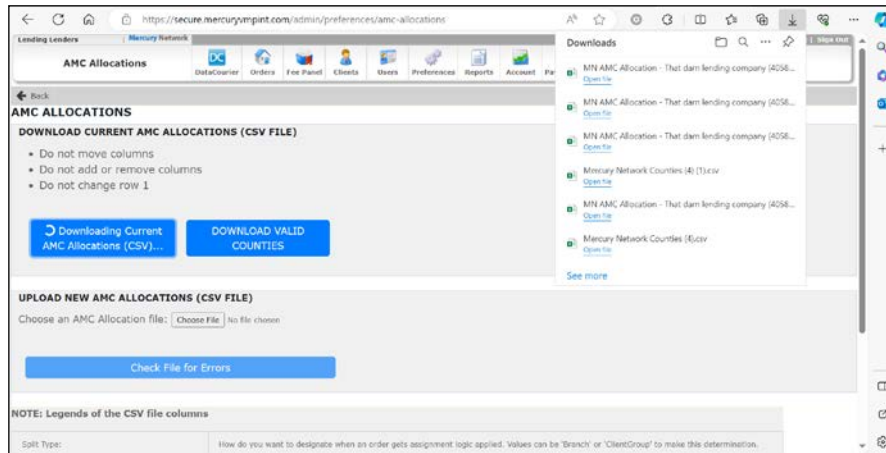
## Instructions

To export your existing setup fee sheets:

**Step 1:** You (an Enabled User) will reach on this page in the Mercury Network (Secure) platform by navigating to Preferences>VMP Client Order Setup>AMC Allocations. Once you arrive at AMC Allocations, you can then download the AMC Allocation & Valid Counties file:



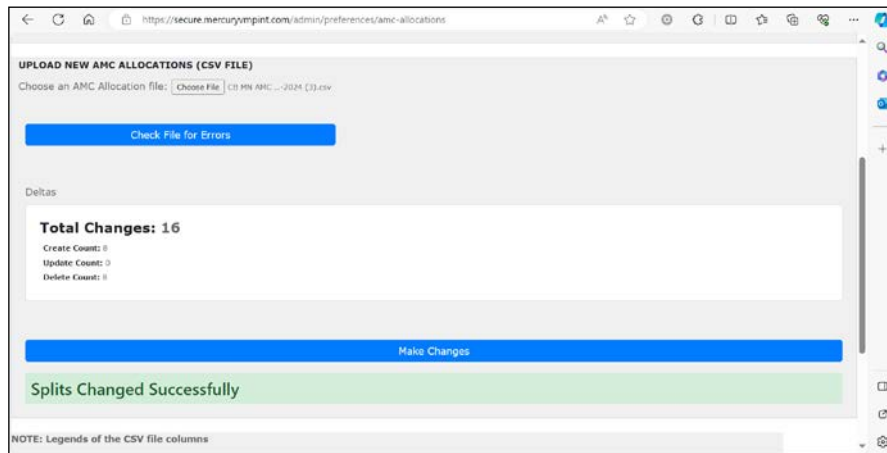
**Step 2:** You can download the current AMC allocations & valid counties csv file by clicking on the blue boxes.



**Step 3:** You can then upload your updated AMC Allocation file with the new AMC details by clicking the Choose File option box. Once your updated file has been chosen, click Check File for Errors.



If you're able to upload your updated file, then you will see the screen below with Total changes count i.e. create, update, delete count and can click on Make Changes to upload the file after which user can see changes uploaded successfully:

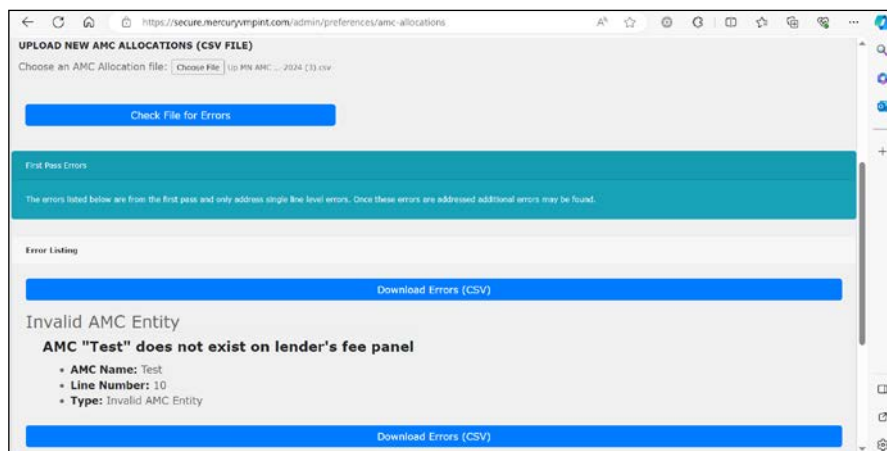


## Error Scenarios

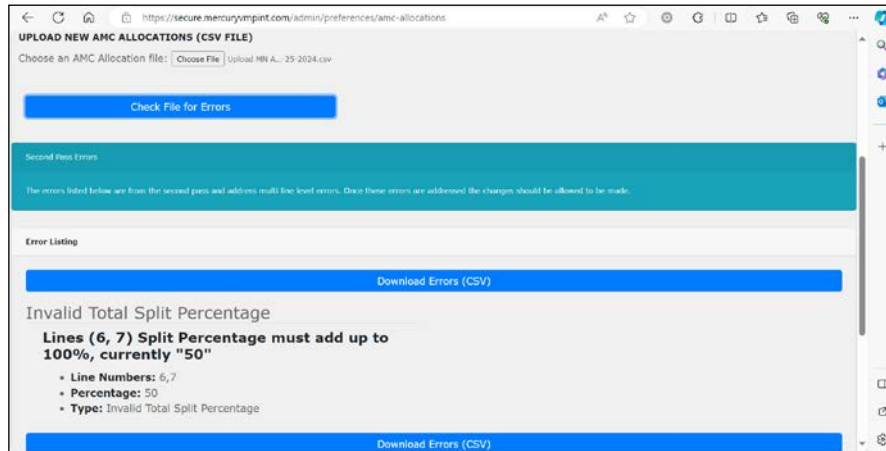
**Note – Uploaded file data values will be verified against current AMC allocation details and will be shown in the UI based on the error types the user will encounter the error.**

1. Upload-First Pass Errors - If you try to add any invalid AMC entry into csv file and then attempt to upload, you will see the following error message:

**The errors listed below are from the first pass and only address single line level errors. Once these errors are addressed additional errors may be found.**



Upload-Second Pass Errors – If you delete the existing AMC record from its currently allocated AMC file, and then attempt to re-upload the csv file, you will then see an error message indicating that the Split Percentage is invalid.



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

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