BPO Assistant Flow Chart

All companies except EQUATOR AND AMN FORMS

1. **Select comps:** utilize the MLS that the RIO BPO EXPORT is set up in (exports are specific to the login information you provided to us for your MLS) **when searching for comps MOST MLS's will NOT give you the correct export option if you are searching by MLS #. *remember if you can find the subject during the selection process select it as the system will key subject info in most cases.

2. **Take notes on each comparable:** story #; style – 1 st, 2 st, split; basement - yes or no; owner – own, reo, short sale etc; these items are too specific and will NOT export or key into the BPO form

3. **BPO EXPORT:** export the data from the MLS using the EXPORT feature **RIO BPO EXPORT**, (see MLS video if you are NOT sure) save in datasources folder on desktop as "**input.csv**". Replace the old one over and over and over. . **note**if using IE9 you MUST use the save as button or select the down arrow and pick save as to get the file in the correct folder**

4. **Clean up data:** login www.RIOGenesis.com, once on select BPO Assistant TAB, login using the username and password we provided you. When on the BPO dashboard click the BPO assistant button, (if you have multiple MLS's select the MLS you pulled comps from before opening the input file) browse for input file which is in datasources folder on desktop, upload data in system. **Note if data is already in the BPO assistant just click reset button and then you will see the browse button**Note2** if nothing comes in means you either did not export correctly or you are selecting the wrong MLS**

5. **ORGANIZE -** Tweak data in BPO Assistant: enter subject information at bottom(remember the more you do here the more the system will key for you) hit organize to clean up the comps data, hit organize a 2nd time to clean up the subject data. **Note**you can move comps around by using the up and down arrow buttons on the left side.

6. **Export cleaned up data:** hit save, save as "**master.csv**" in datasources folder on desktop, replace the old one – save over and over and over the old one. THIS IS VERY VERY important, if you do not save it as master.csv in the datasources folder your macro will key wrong information. **note**if using IE9 you MUST use the save as button or select the down arrow and pick save as to get the file in the correct folder**

7. **Run Macro:** open BPO/REO company **USING THE IMACRO BROWSER**, get to the point in the BPO that you would be starting to key the BPO. Find macro on left side of screen, double click and data will be keyed in. (remember the name of the company you are keying for is the macro name you select, when finished running hit save, to save your work. **note** you can NOT be logged into the REO or BPO company in another browser at the same time or the macro will not run

8. **Finalize the bpo:** Start at top of BPO page (still in the Imacro browser), fill in what is needed in the bpo, upload the subject photos along with the comparable photos, validate the BPO. If you want to print your bpo prior to submission you must right click the screen and select print, this applies from the Imacro browser only.

9. **IF YOU ARE TRACKING ORDERS Close out order in DASHBOARD:** EDIT order in dashboard, (if you want to save your docs)go to data tab, upload the docs(this is not required), then move status to completed unpaid, hit save.

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