

Mercury Network®

lender readiness checklist

- ☐ Review Mercury Websites to understand all the changes made to support Valuation Modernization and UAD 3.6. Emphasize the importance of understanding the new features and updates to existing features. There are new statuses, new user permissions, new workflows, etc.
[Mercury Network Valuation Modernization client resource hub](#) 
[Doc360](#) 
- ☐ Attend webinar
[Click here to register](#) 
- ☐ Attend office hours to ask questions. Sessions are every Tuesday at 10:00 a.m. CDT and every Thursday at 3:00 p.m. CDT.
[Click here to join the Tuesday session](#) 
 - Meeting ID: 293 380 792 281 79
 - Passcode: sN7ok3Nc[Submit questions](#) 
[Click here to join the Thursday session](#) 
 - Meeting ID: 244 791 287 244 74
 - Passcode: Sx2E8d5j[Submit questions](#)
- ☐ Review LOS set up instructions, not applicable for Mercury Direct lenders.
- ☐ Coordinate go-live activities with your AMCs using sample template provided by Client Delivery.
- ☐ Review appraisal review package, if applicable
- ☐ **Required configurations:** Make configuration changes in Mercury Network. *Please read the entire documentation, even if it doesn't require a configuration change.*
You can find assistance with configurations on the Doc360 website linked above, or

by submitting a question and joining office hours.

- Fee administration, if applicable
 - Create fee and price plans
 - Configure fee module tiers
 - Review and make updates to the provided fee/price plan template(s)
 - Upload fee/price plan templates to Mercury Network
 - Product requirements
 - Engagement letter content
 - User profiles
 - VMP client
 - Client users
 - Client groups
 - Vendor profile updates/assignment eligibility
 - Confirm vendor coverage for 3.6 order pipeline
 - Confirm assignment eligibility matches the lender's expectations
 - Critical rule firings, if applicable (Collateral Investigate™)
 - Investor submission configuration
 - Pending release configuration
 - Review configuration

☐ Optional configurations

- Reporting subscriptions
- VMP client status mapping
- Status mapping to Action Required folder
- Property characteristics
- Order form configuration

☐ You are now ready to place a pilot order

- Cotality **highly** recommends that customers place a few pilot orders once configurations are complete to ensure orders are behaving as expected.
- [Submit the Cotality attestation.](#) 
- **Congratulations!** Your account is now ready to begin processing UAD 3.6 orders.