

Integrating Pruvan with Mortgage Contracting Services (MCS)

This document is a step-by-step guide on how to integrate your Pruvan account with Mortgage Contracting Services (MCS.) For detailed information about how Pruvan integration works please read the *Pruvan Implementation Guide*.

Create a Third Party User on Vendor360

In order to give Pruvan access to your MCS account, you will need to create a new user in Vendor360 with the appropriate permissions. MCS's documentation on [user management can be found here](#).

1. Login in to your Vendor360 account
2. Click on 'Admin' from the menu bar, then select 'Manage Users'
3. Click the Clear Screen button to ensure you're creating a new user
4. On the left hand side, fill out all of the text boxes;
 - a. The 'User Login' and 'Password' you choose will be used for Pruvan to login with
5. Check the 'User is Active' box
6. Check the 'Third Party Web Service' box
7. Select Pruvan from the Company dropdown menu
8. Click on 'Create'
9. A Terms & Conditions window will pop up
 - a. Read the agreement with MCS, and if you agree then
 - b. Check 'I have read and accept the above on behalf of this third party user'
 - c. Click 'Accept'

The screenshot shows the 'Selected User' form in Vendor360. The form is divided into several sections:

- 4**: A red box highlights the text input fields for First Name (Pruvan), Last Name (Pruvan), Phone (Your Phone #), User Name (Pruvan), Password (masked with asterisks), and Email Address (Your Email).
- 5**: A red circle highlights the 'User Is Active' checkbox, which is checked.
- 6**: A red circle highlights the 'Applications' section, where the 'Third Party Web Service' checkbox is checked.
- 7**: A red circle highlights the 'Third Party Web Services' dropdown menu, which is set to 'Pruvan'.
- 8**: A red circle highlights the 'Create' button at the bottom right of the form.
- 3**: A red circle highlights the 'Clear Screen' button at the bottom right of the form.

The 'Permissions' section is also visible, showing a list of permissions with checkboxes, including 'Select All', 'Admin - Manage Subcontractors', 'Admin - Manage Users', 'Admin - Vendor Info and Contacts', 'ADMIN-Dump Site Info', 'Create/Modify Detailed Damage Report', 'Damages - Enter Damages', 'Damages - View Damages', and 'File->Messaging System'.

Create an MCS Client

In order for your Work Orders to be automatically downloaded from MCS to Pruvan, you need to create a Pruvan Client record for MCS. *These instructions are based on the new user interface. Click the 'Try Pruvan's new look!' link at the top of your screen if the pictures don't look the same for you.*

1. Login to your Pruvan account at www.pruvan.com and click on the **Integrations**.
2. Click the **New** button.
3. Enter a name for your client record, something like "MCS" and then select **Mortgage Contracting Services (Enhanced)** in the drop-down box.
4. Click the **Next** button.

The screenshot shows a 'Create New Integration' dialog box. It has a title bar with a close button. Below the title bar, there are two input fields. The first is labeled 'Integration Code' and contains the text 'MCS'. The second is labeled 'Integration Type' and is a dropdown menu showing 'Mortgage Contracting Services (Enhanced)'. Both labels and the input fields are marked with a red circle containing the number 3. At the bottom right of the dialog, there are two buttons: 'Cancel' (blue) and 'Next' (white with blue border). The 'Next' button is marked with a red circle containing the number 4.

5. Enter the MCS User Login and Password that was previously set up, then enter your Vendor Code. *If the User Login is not set up as a Web Service (with Pruvan as the company) then the connection test will fail. Remember to update the password here anytime you change it in Vendor360.*
6. Set Enable MCS Check In to yes unless you plan to use another mobile app to complete your check ins
7. Click on **Validate** to test your login information. If it works, you should see the following message: **Success!**
8. Click **Save** to save your setup

Edit Integration



Integration Code

MCS2

Integration Type

Mortgage Contracting Services (Enhanced) ▼

Username

5

Enter username

Password

5

Enter password

Vendor

5

Enter Vendor ID

Survey Tasks

Enter additional survey tasks to add (optional)

Relay Photos

Yes ▼

Default Assign To

(unassigned) ▼

Enable MCS Check-In

6

Yes ▼

Auto Admin

On ▼

Push Key

```
https://test.direct.pruvan.com/api/?  
apiKey=Qc71lby4C_cQUco_YP71ey1RV7YeIYNnsKqUJSgmZv1LgUlfqjB1PvTysSqUn  
PUQ0dcGShxLV-J2W5DOD55PKwT6S5V4IH6rLs-  
h2Hxa5VmkiXltYi2NQPvQq_E3KXNsqeNpiOToH1zcXbzg1jGaww
```

7

8

[View Help Documentation](#)

[Validate](#)

[Full Import](#)

[Cancel](#)

[Save](#)

Importing Orders

Regular Import

To import your orders you will need to do the following:

1. Log in to your [Pruvan account](#)
2. Click on Integrations
3. Locate your MCS integration
4. Click Import Orders

This will pop up the Import Log window. This will allow you to verify the status of your import. Once you see 'Import Complete' you can close the window and begin working on assigning those projects. Please note that there is no 'auto-import' function with the MCS driver.

Full Refresh

A full refresh allows you to 're-sync' your Pruvan and MCS accounts. What this will do is import all of your MCS orders and then delete any excess MCS orders that are in Pruvan. To complete a Full Refresh do the following:

1. Log in to your [Pruvan account](#)
2. Click on Integrations
3. Select your MCS integration
4. Click Edit
5. Click Full Refresh

Push Key

The push key can be used as an alternative to pushing the Import Orders button. To use the push key you would simply copy all of the text and paste it in to your browser's address bar. If the call is made successfully you will see "{success:true, error: null}", otherwise there will be an error listed. This will do the same thing as pushing the Import Orders button for your integration. You can bookmark this site and open it anytime you want to import orders, or use it to programmatically import orders.

Data Mapping

Your new MCS work orders and line items should appear as Pruvan Projects and Tasks in the Projects page. The table below shows the data mapping between MCS and Pruvan.

MCS	Pruvan
Work Order	Project
Work Order Number	Project Name
Address	Address
City	City
State	State
ZIP	ZIP
Due Date	Due Date
Allocation Area	Reference
Work Order Line Item	Task
Line Item Description	Task Name
Instructions	Instructions

MCS Tasks

In addition to the MCS work orders and line items, additional Pruvan Tasks will be created for the photo groupings in MCS's Vendor 360 system. The following Pruvan Tasks will be created for each MCS work order that gets imported.

Image Gallery

Bid Photos

Occupancy Photos

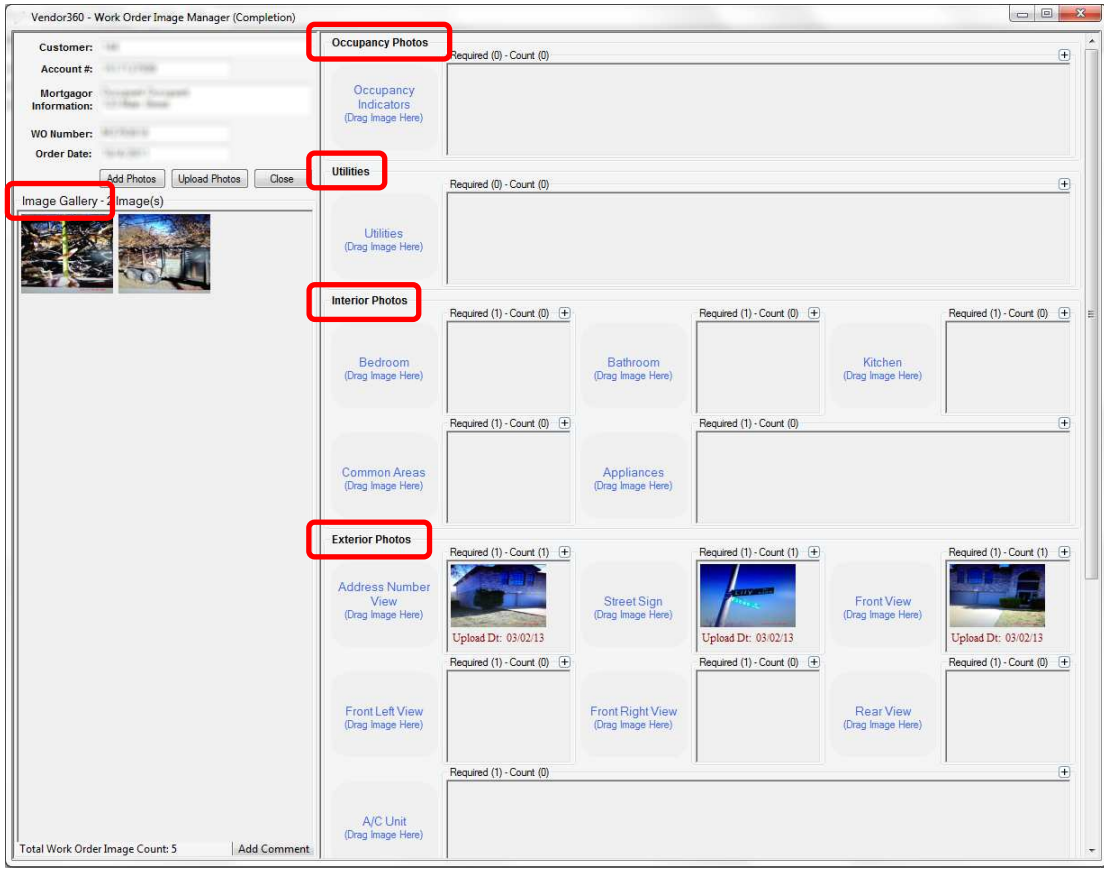
Utilities

Interior Photos

Exterior Photos

Photos taken with Pruvan mobile under these Pruvan Tasks will be sent to MCS and appear in the corresponding sections, except for **Bid Photos** which will appear in the **Image Gallery**. The non-bid work order items photos will appear in the **Completion Before** and **Completion After** sections of each MCS line item if you use the **before** and **after** evidence types on your Pruvan device. You can train your field staff to use these Tasks to categorize the photos they take.

In the example below, there are 2 photos in **Image Gallery**, 3 photos in **Exterior Photos**, and zero photos in **Occupancy Photos, Utilities and Interior Photos**.



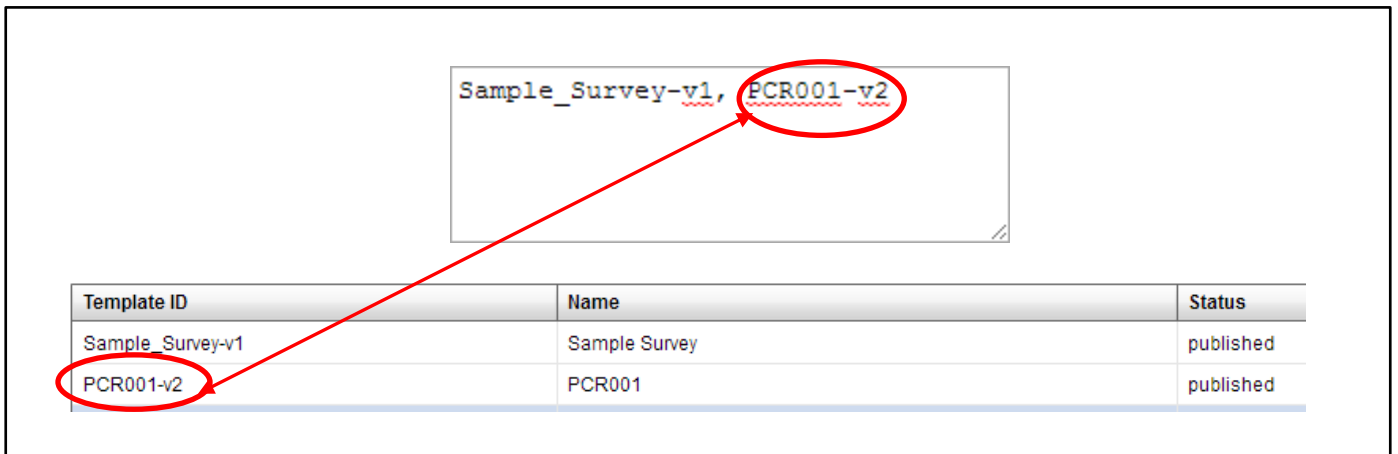
Check In

MCS Check In is available for all orders that MCS has defined needing a check-in for. To enable Check In, open your MCS integration and set 'MCS Check In' to 'true'. Then click 'save', and 'import orders'. You will see the Check In option when you open the project on a mobile device. To learn more about how to check in see [this document](#).

Additional Tasks

You can optionally enter additional Survey Tasks that are created by Pruvan when your MCS Projects are imported. These tasks will be created in addition to the normal tasks created by the integration. Any tasks entered here will be applied to every order imported by the integration. Survey PDFs will publish to your Downloader and online, they will NOT relay to MCS. You can enter a comma separated list to attach more than one survey.

The Surveys must have been defined in Survey Management, the Template ID of the Survey must match exactly what you enter in the Survey Tasks box and include the version number. The Survey must also be published. When the Survey Task is created it will use the Survey Name as the name of the Survey Task.



The screenshot shows a text input field containing the text "Sample_Survey-v1, PCR001-v2". The "PCR001-v2" portion is circled in red. A red arrow points from this circled text to the "PCR001-v2" entry in the table below. The table has three columns: "Template ID", "Name", and "Status".

Template ID	Name	Status
Sample_Survey-v1	Sample Survey	published
PCR001-v2	PCR001	published

Push Updates

You can use the Push Key to submit updates to your MCS workorders programmatically. To do this use the Force Update method described in the [Standard API documentation](#) and the instructions for using the push key for updates.