

Appraisal Firewall Quick Start Guide

Information for Manager Users

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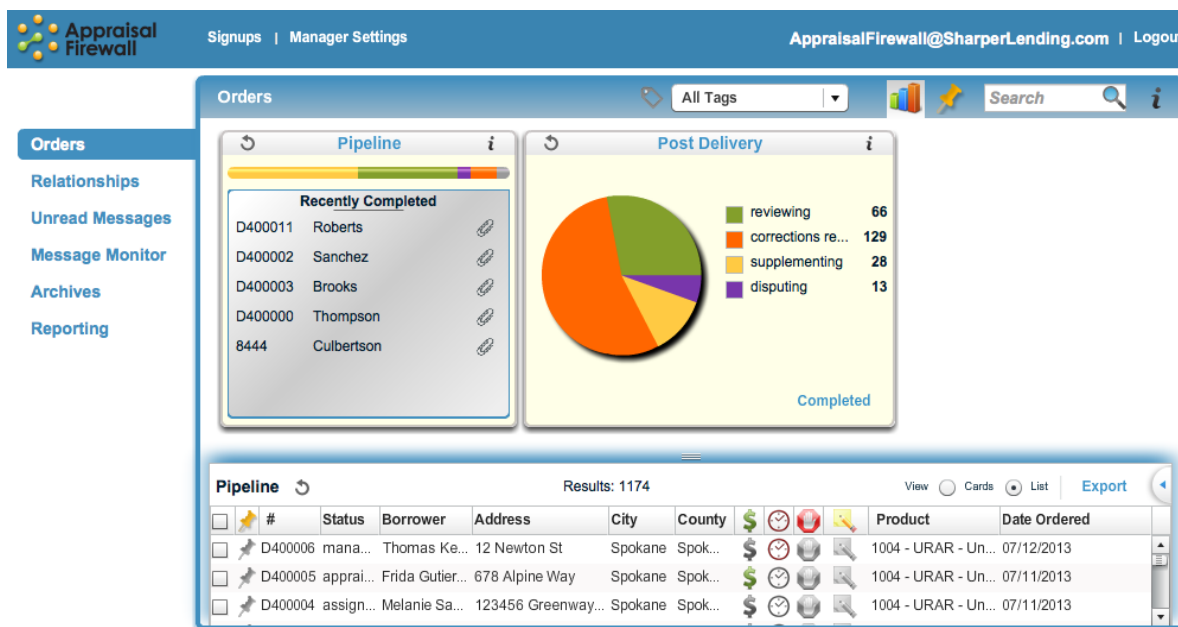
Basic Usage and Layout

The basic manager user account has access to all clients' accounts and their orders, plus can create new manager users and edit all manager account settings. Use the **Signups** link along the top left to monitor appraiser and lender signups under your manager account. The **Manager Settings** link allows you to view and edit your company account in Appraisal Firewall. The email address entered in the Manager Settings window is your main customer service email.

At the upper right hand side of your account is the email address you have logged in with. To edit your personal manager user account information including password and contact information, click on the email address to open the profile screen.



Along the left hand side of your account, you can check your orders in the **Orders** window, manage your client **Relationships**, view **Unread Messages**, monitor lender/appraiser communications on the **Message Monitor**, restore **Archives**, and track your **Reporting**.



#	Status	Borrower	Address	City	County	Product	Date Ordered
D400006	mana...	Thomas Ke...	12 Newton St	Spokane	Spok...	1004 - URAR - Un...	07/12/2013
D400005	apprai...	Frida Gutier...	678 Alpine Way	Spokane	Spok...	1004 - URAR - Un...	07/11/2013
D400004	assign...	Melanie Sa...	123456 Greenway...	Spokane	Spok...	1004 - URAR - Un...	07/11/2013

The Pipeline Orders List is the default view whenever you log into your Appraisal Firewall account. You can choose to view any order type you wish by selecting it in either the Pipeline or Post Delivery management tools. The Orders List below will populate the list associated with the order type you have selected.

Signups

With **Signups**, you are able to monitor new lenders and appraisers who have signed up under your private label link. Viewing new signups helps in tracking responses to marketing and makes you aware of new users who have joined the system.

Signups Done							
Profiles Since	1/23/2012	<input checked="" type="checkbox"/> Originators <input checked="" type="checkbox"/> Appraisers	Search <input type="text"/>		Count	9	
Date	Type	Manager	RM	Contact	City	State	Email
1/23/2012 12:03:	Appraiser	Appraisal Firewall		curtis appraiser14	Spokane	WA	curtis.appraiser14@gmail.com
1/23/2012 12:00:	Appraiser	Appraisal Firewall		curtis appraiser13	Spokane	WA	curtis.appraiser13@gmail.com
1/23/2012 11:50:	Appraiser	Appraisal Firewall		curtis appraiser12	Spokane	WA	curtis.appraiser12@gmail.com
1/23/2012 11:48:	Appraiser	Appraisal Firewall		curtis appraiser11	Spokane	WA	curtis.appraiser11@gmail.com
1/23/2012 11:46:	Reviewer	Appraisal Firewall		Ticia the Reviewer	Spokane	WA	reviewer@af.com
1/23/2012 10:53:	Rotation	Appraisal Firewall		olivias lender	Spokane	WA	olivia@lender.com

Manager Settings

With **Manager Settings** you can view and edit your company information, including contact numbers, customer service email, and corporate address. You can also modify your fees, add credit card processing information, and add your private label website address. The pricing entered under Manager Settings is the default pricing for your account. You can also set pricing on a per client basis in the **Relationships** window.

My Profile - AF Dev
Cancel
Done

Your Management Profile

Fees (default)	\$	%	Amount	Fees Paid By
Residential				
Transaction	<input checked="" type="radio"/>	<input type="radio"/>	24.00	<input checked="" type="radio"/> Appraiser <input type="radio"/> Originator
Billing	<input checked="" type="radio"/>	<input type="radio"/>	12.00	<input type="radio"/> Appraiser <input checked="" type="radio"/> Originator
Commercial				
Transaction	<input type="radio"/>	<input checked="" type="radio"/>	36	<input type="radio"/> Appraiser <input checked="" type="radio"/> Originator

Credit Card Processing

Processing Center	Authorize.Net	▼	Accept	<input checked="" type="checkbox"/> Visa
Account Name	SharperLending Solution		<input type="checkbox"/> MasterCard	
Login ID	*****		<input checked="" type="checkbox"/> American Express	
Transaction Key	*****			

Back
Next

Orders

The Orders tab along the left side of your account is your main view into all orders that have been placed by your clients in Appraisal Firewall. Use the Search filter to locate a specific order. You can choose to view any order type you wish by selecting it in either the Pipeline or Post Delivery management tools. The Orders List below will populate the list associated with the order type you have selected (ie if you select Supplementing in the pie chart, the list will filter down to display only orders in a supplementing status).



The screenshot displays the Appraisal Firewall interface. At the top, there's a navigation bar with 'Signups | Manager Settings' and 'AppraisalFirewall@SharperLending.com | Logout'. The main area is titled 'Orders' and includes a search bar and 'All Tags' filter. On the left, a sidebar lists navigation options: 'Orders', 'Relationships', 'Unread Messages', 'Message Monitor', 'Archives', and 'Reporting'. The main content area is split into two panels: 'Pipeline' and 'Post Delivery'. The 'Post Delivery' panel shows a pie chart with the following data:

Status	Count
reviewing	66
corrections re...	129
supplementing	28
disputing	13

Below the pie chart is a table titled 'Pipeline' with 1174 results. The table has the following columns: #, Status, Borrower, Address, City, County, Product, and Date Ordered. The first few rows of data are:

#	Status	Borrower	Address	City	County	Product	Date Ordered
D400011	Roberts						
D400002	Sanchez						
D400003	Brooks						
D400000	Thompson						
8444	Culbertson						

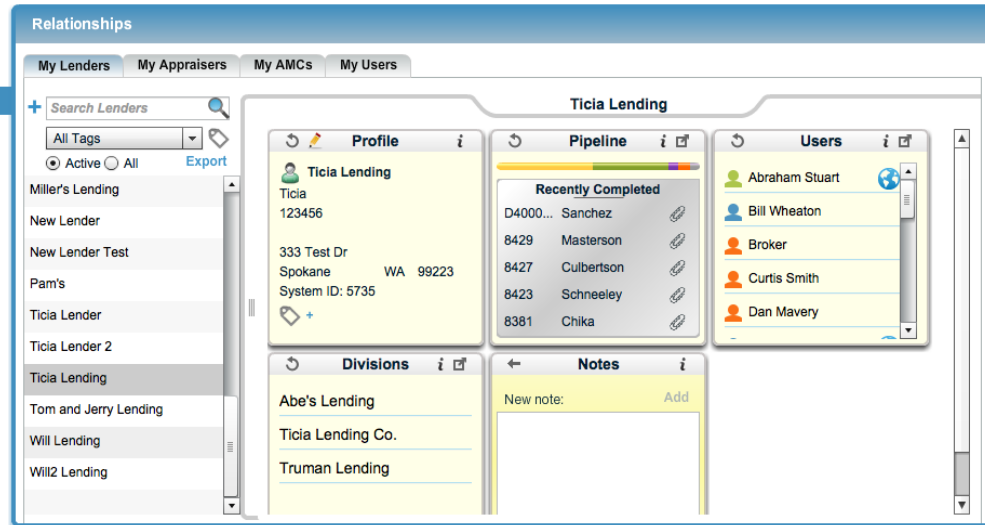
The 'Pipeline' table also includes an 'Export' link and a 'View' dropdown menu with options for 'Cards' and 'List'.

You can sort by any of the columns within any orders list by clicking the column header (ie view all overdue orders by clicking the clock icon column header).

Expand the arrow icon next to the Export link above any order list to modify the columns displayed to you. Minimize clutter and view the information that is most relevant to you by choosing to display the columns with the information that impacts you most.

Relationships

The Relationships window is your guide into all your clients' accounts. This window lets you enable settings and review company information on a per-client basis. You can access and manage your lenders, appraisers, AMCs, and other manager users in your office. In addition, you can view a summary of a selected client and any orders they have.



My Lenders

The My Lenders tab in the Relationships window displays all your clients and their settings and allows you to manage and work within their orders. Select or search for a particular client to view their information, settings, or orders.

You can also tag your lenders to be able to sort to filter to find clients and orders that you monitor closely. Create a tag using the tag icon in a client's Profile toolbox. Then, use the tag drop down menu to find all lender's that you have tagged with the same filter. For instance, if you tag several lenders as 'manager bill,' you can then sort to view all your manager bill clients at one time.

To edit an individual client's settings or work within their account, use the toolboxes to hone into specific account information. The toolboxes pertain to the client that is selected along the left hand side.

- **Profile Tool** – View the selected client's basic company information such as contact name, company address, and phone number.
- **Pipeline Tool** – Expand the toolbox to view the client's orders and work within them.
- **Users Tool** - View and edit the list of users under this lender. You can change user types and assign users to different divisions.

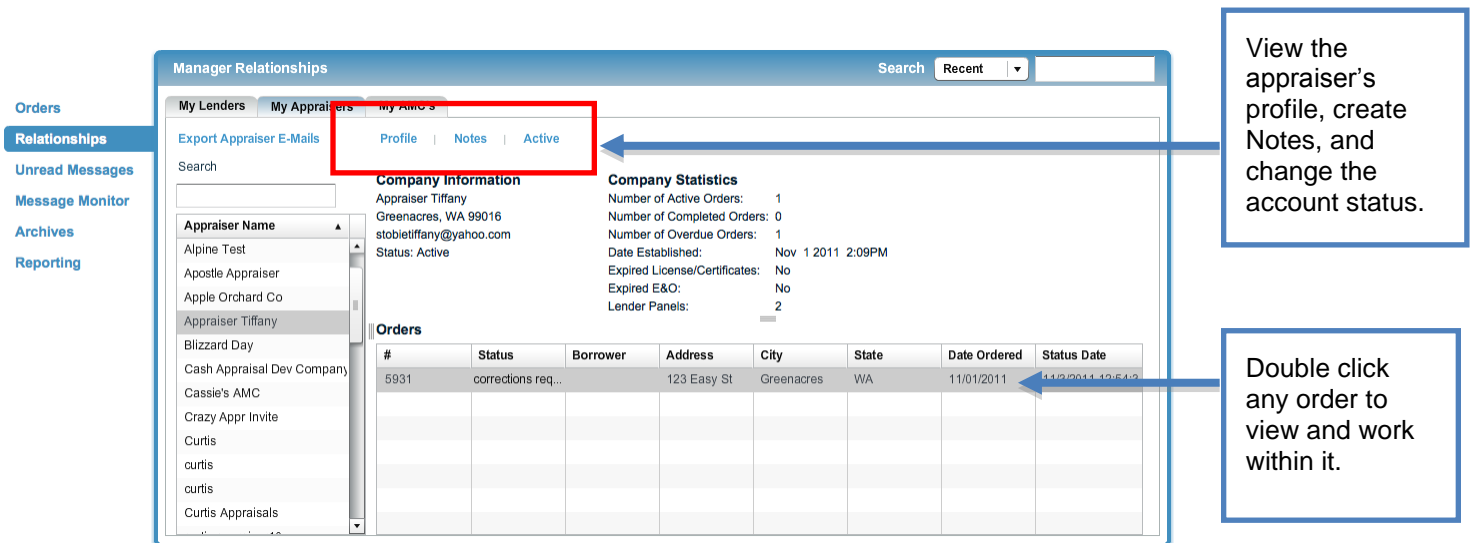
- **Notes Tool** – Create notes about working with this client to better manage your relationship. These notes are only available for manager users to view.
- **Divisions Tool** – View all divisions under the selected company and expand the toolbox to view orders on a per division basis. Clients with a single division are labeled as Main.

[Click here](#) for more detailed information on working in the Relationships window.

My Appraisers

My Appraisers lets you view current appraisers that are on your clients' panels and enables you to put their accounts into an 'On Hold' status. You can also view the appraiser's profile and create notes about the appraiser that are viewable to only you.

View and work in any order the appraiser is associated with by double clicking the order in the Orders section.

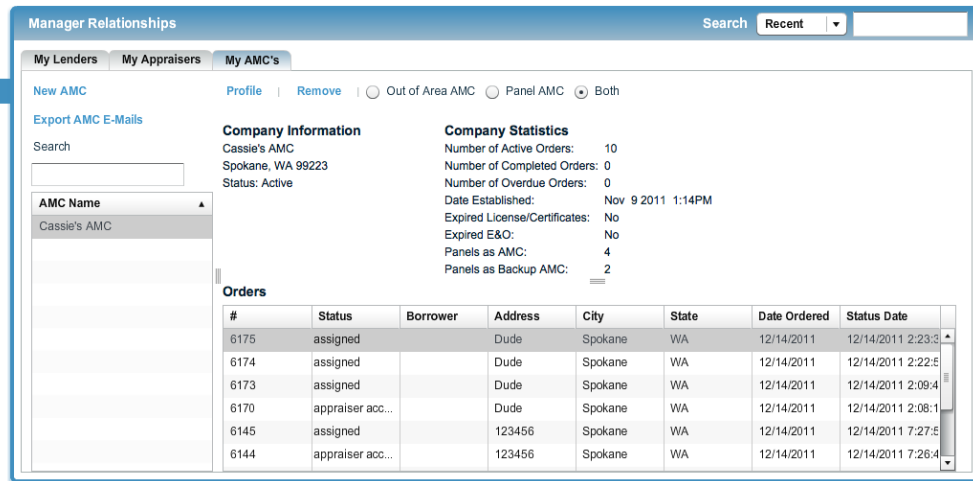


View the appraiser's profile, create Notes, and change the account status.

Double click any order to view and work within it.

My AMCs

Use **My AMCs** to provide out of area coverage and to provide an AMC panel for your clients to choose from when placing orders. The AMC panel is helpful for fulfilling specific secondary marketing requirements of using a particular AMC for processing appraisals. You can also create backup AMCs for automatic routing on out of area orders.



Manager Relationships | Search: Recent

My Lenders | My Appraisers | **My AMCs**

New AMC | Profile | Remove | Out of Area AMC | Panel AMC | Both

Export AMC E-Mails

Search:

AMC Name: Cassie's AMC

Company Information
 Cassie's AMC
 Spokane, WA 99223
 Status: Active

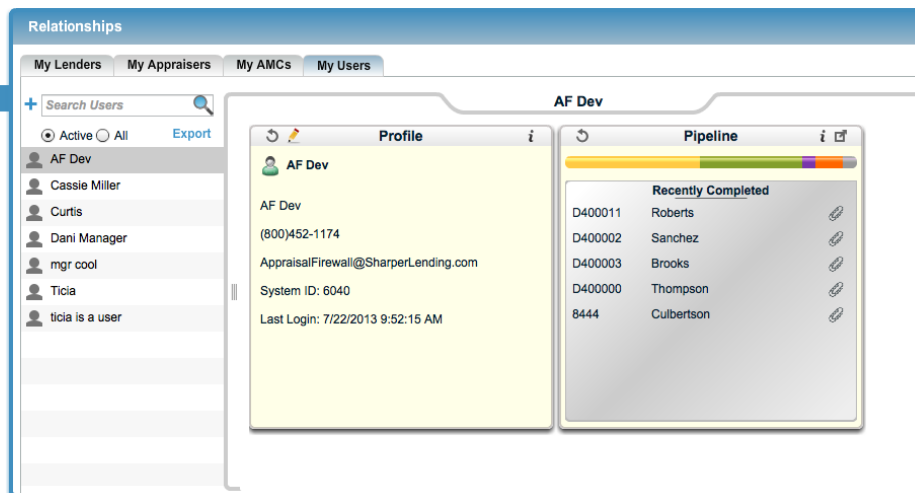
Company Statistics
 Number of Active Orders: 10
 Number of Completed Orders: 0
 Number of Overdue Orders: 0
 Date Established: Nov 9 2011 1:14PM
 Expired License/Certificates: No
 Expired E&O: No
 Panels as AMC: 4
 Panels as Backup AMC: 2

Orders

#	Status	Borrower	Address	City	State	Date Ordered	Status Date
6175	assigned		Dude	Spokane	WA	12/14/2011	12/14/2011 2:23:5
6174	assigned		Dude	Spokane	WA	12/14/2011	12/14/2011 2:22:5
6173	assigned		Dude	Spokane	WA	12/14/2011	12/14/2011 2:09:4
6170	appraiser acc...		Dude	Spokane	WA	12/14/2011	12/14/2011 2:08:1
6145	assigned		123456	Spokane	WA	12/14/2011	12/14/2011 7:27:5
6144	appraiser acc...		123456	Spokane	WA	12/14/2011	12/14/2011 7:26:4

My Users

Add other users in your office who should have access to your clients' accounts and their orders. Because each user is tracked in the communications log of an order, providing unique login credentials to others in your office lets you track who performed work on an order. You can also view orders that others have pinned for closer monitoring, so you know how to follow up in case of someone's absence.



Relationships

My Lenders | My Appraisers | My AMCs | **My Users**

+ Search Users

Active All

- AF Dev
- Cassie Miller
- Curtis
- Dani Manager
- mgr cool
- Ticia
- ticia is a user

AF Dev Profile

AF Dev
 (800)452-1174
 AppraisalFirewall@SharperLending.com
 System ID: 6040
 Last Login: 7/22/2013 9:52:15 AM

AF Dev Pipeline

Recently Completed

D400011	Roberts	
D400002	Sanchez	
D400003	Brooks	
D400000	Thompson	
8444	Culbertson	

Unread Messages

The **Unread Messages** link gives you a quick view of communications, statuses, and billing activities that go back and forth between lenders and appraisers in Appraisal Firewall. Click the Get Messages button to retrieve the last fifty messages that may pertain to your manager account. Double-click on any message to open that specific order as well as clear the message from the list.

Unread Messages							Get Messages
Date/Time	From	Type	Borrower	Street	Comment		
7/11/2013 1:20:13 PM	Customer Service	Lender Management Fee Approval	Frida Gutierrez	678 Alpine Way	Fee will be paid to the lender upon completion		
7/11/2013 1:20:13 PM	Appraiser	Appraiser Fee Approval	Frida Gutierrez	678 Alpine Way	Fee (after any service fees) will be paid to the appraiser upon completion		
7/11/2013 10:06:52 AM	Appraiser	Appraiser Fee Approval	Calyx Order	100 Jo Jo	Price Adjustment		
7/11/2013 10:04:55 AM	Originator	Lender Fee Approval	Calyx Order	100 Jo Jo	Lender Fee		
7/11/2013 10:04:55 AM	Customer Service	Lender Management Fee Approval	Calyx Order	100 Jo Jo	Fee will be paid to the lender upon completion		

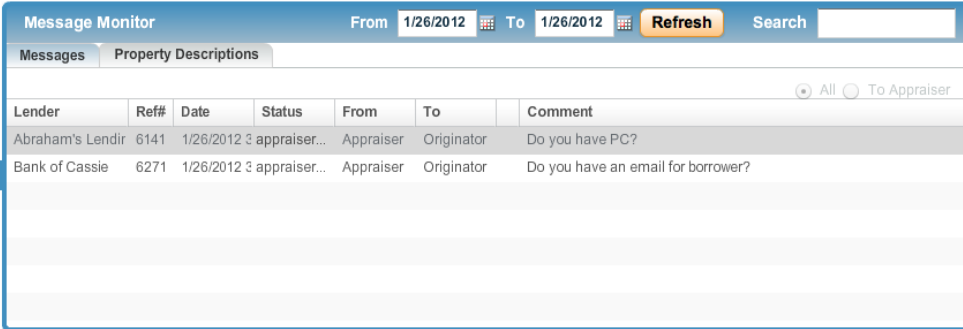
Message Monitor

Use **Message Monitor** to quickly view messages between lenders and appraisers to assist with compliance monitoring, and intervene to help troubleshoot user issues. Double-click on any message to open that specific order. You can even view messages by a specified date range.

Message Monitor		From	07/01/2013	To	7/22/2013	Refresh	Search
		Messages					
		Property Descriptions					
		<input checked="" type="radio"/> All <input type="radio"/> To Appraiser					
Lender	Ref#	Date	Status	From	To	Comment	
Abraham's	8410	7/17/2013 12:5	appraiser acc...	Appraiser	Appraiser	Action required flag cleared	
Abraham's	8410	7/17/2013 12:3	appraiser acc...	Appraiser	Originator	Do you have an alternate contact number?	
Abraham's	8410	7/17/2013 12:3	appraiser acc...	Administrator	Appraiser	Do you have an ETA on this?	
Abraham's	8410	7/17/2013 12:1	appraiser acc...	Administrator	Appraiser	Do you have an ETA on this?	
Abraham's	D400010	7/16/2013 1:00	requested	System	Administra	New Commercial Order Created	
Abraham's	8395	7/16/2013 10:4	appraiser acc...	Appraiser	Originator	test	
Dani RM C	D400009	7/16/2013 7:49	assigned	Administrator	Appraiser	kjjkjk	

Archives

With **Archives**, you have the ability to search for and restore archived orders. This allows your main order list to stay uncluttered, while also giving you access to old orders.



Message Monitor From 1/26/2012 To 1/26/2012 Refresh Search

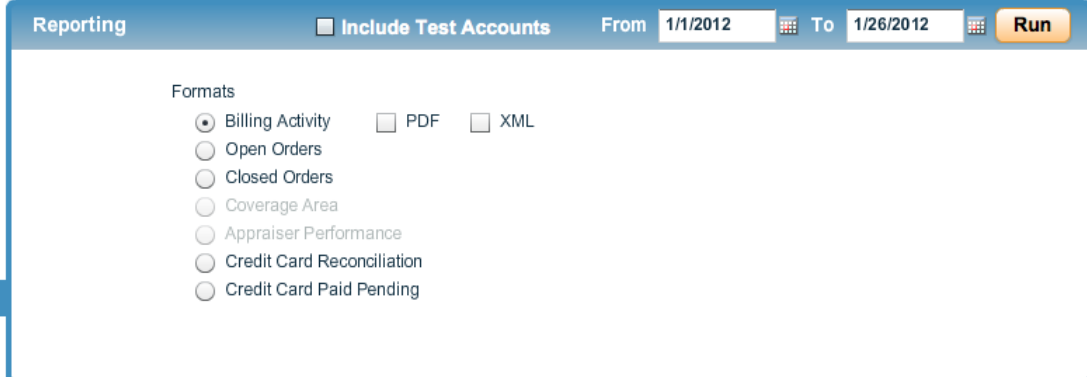
Messages Property Descriptions

All To Appraiser

Lender	Ref#	Date	Status	From	To	Comment
Abraham's Lendir	6141	1/26/2012	3 appraiser...	Appraiser	Originator	Do you have PC?
Bank of Cassie	6271	1/26/2012	3 appraiser...	Appraiser	Originator	Do you have an email for borrower?

Reporting

Run a billing report from the **Reporting** tab to track and manage Billing Activity, Open Orders (not yet completed), and Closed Orders (completed). You can also run a report for credit card reconciliation and view pending credit card payments.



Reporting Include Test Accounts From 1/1/2012 To 1/26/2012 Run

Formats

- Billing Activity PDF XML
- Open Orders
- Closed Orders
- Coverage Area
- Appraiser Performance
- Credit Card Reconciliation
- Credit Card Paid Pending