Appraisal Firewall Quick Start Guide

Information for Manager Users

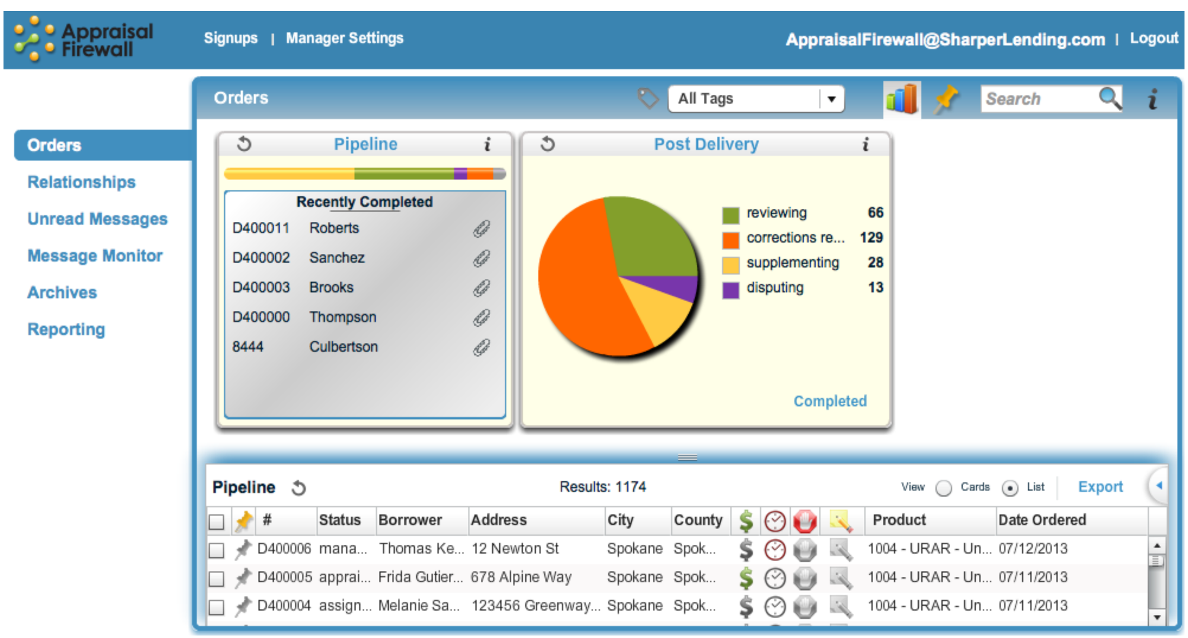
Contents

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.

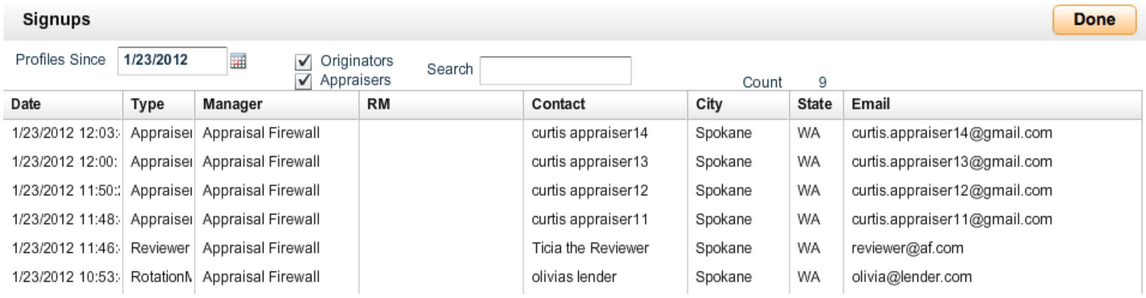
Along the left hand side of your account, you can check your orders in the **Orders** window, manage your client **Relationships**, view **Unread Messages**, monitor lender/appraiser communications on the **Message Monitor**, restore **Archives**, and track your **Reporting**.



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.

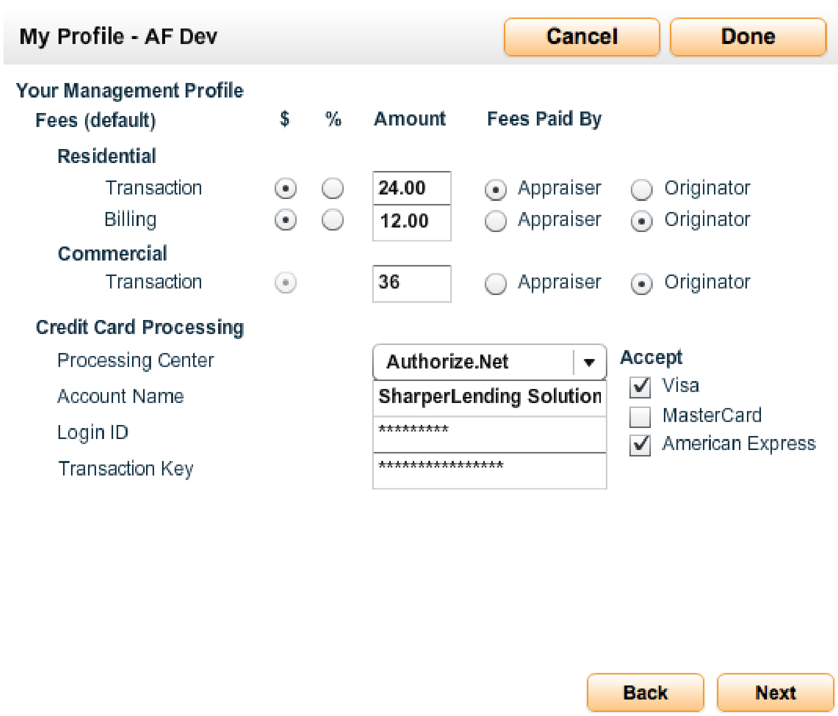

Signups Done

Profiles Since 1/23/2012 ☑ Originators ☑ Appraisers Search 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:	RotationM	Appraisal Firewall		olivias lender	Spokane	WA	olivia@lender.com

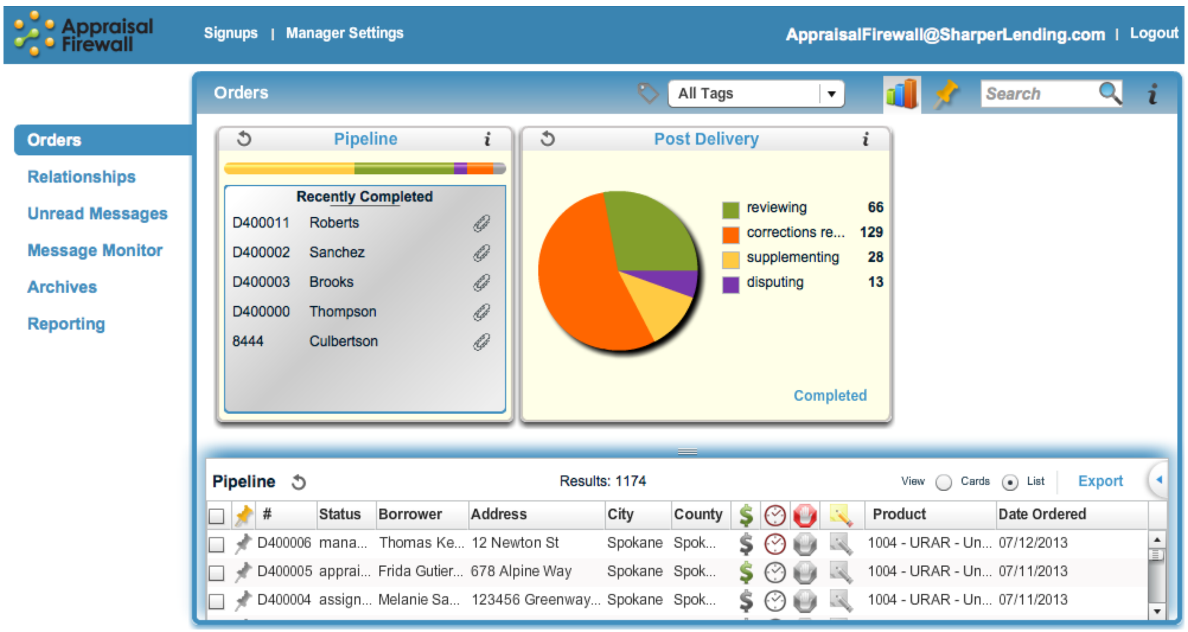
Manager Settings

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.



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).

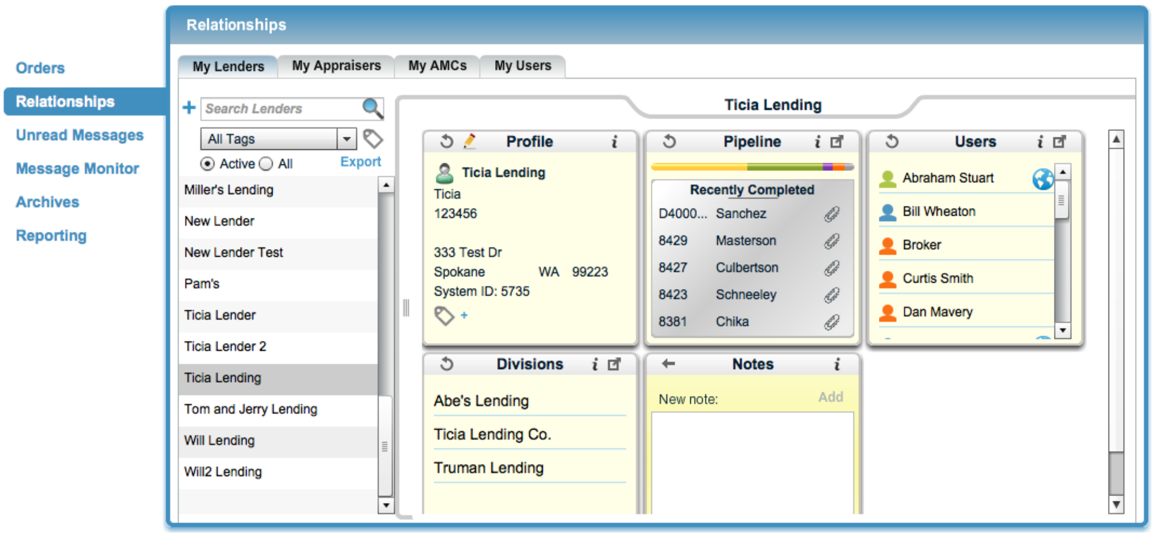


You can sort by any of the columns within any orders list by clicking the column header (ie view all overdue orders by clicking the clock icon column header).

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.

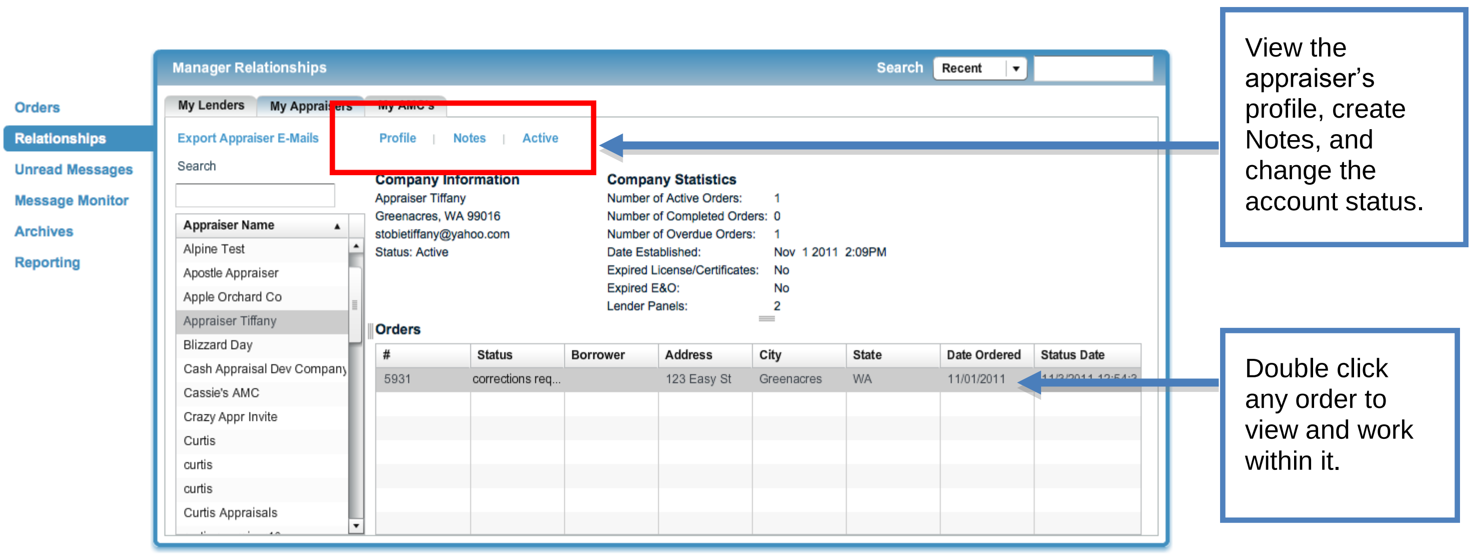
- **Notes Tool** – Create notes about working with this client to better manage your relationship. These notes are only available for manager users to view.
- **Divisions Tool** – View all divisions under the selected company and expand the toolbox to view orders on a per division basis. Clients with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

Click here for more detailed information on working in the Relationships window.

My Appraisers

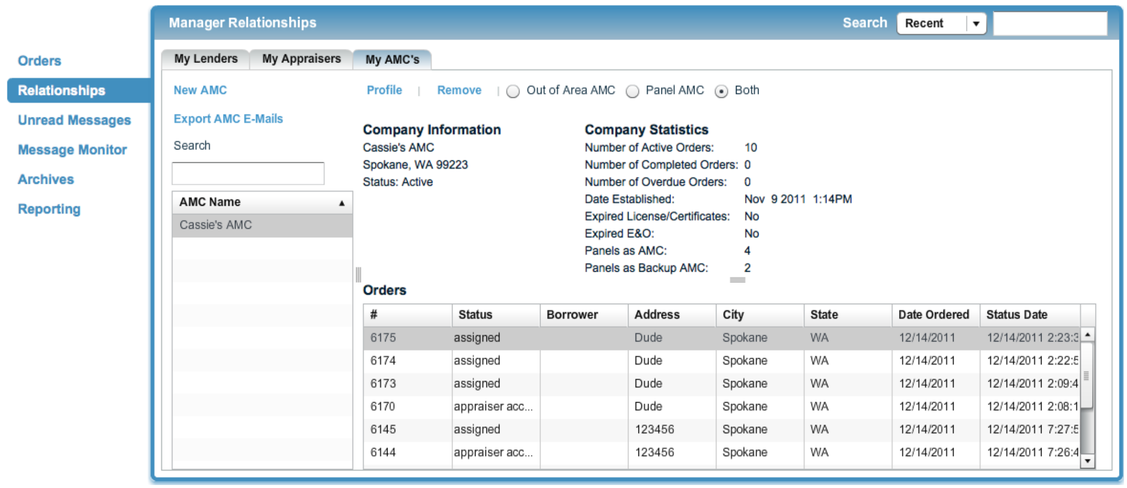
My Appraisers lets you view current appraisers that are on your clients' panels and enables you to put their accounts into an 'On Hold' status. You can also view the appraiser's profile and create notes about the appraiser that are viewable to only you.

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



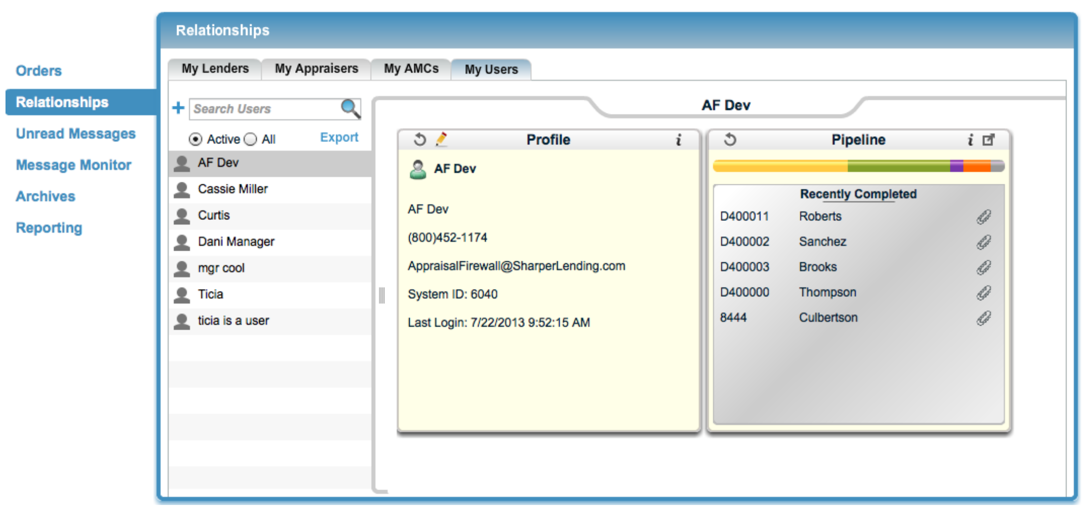
My AMCs

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.



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.

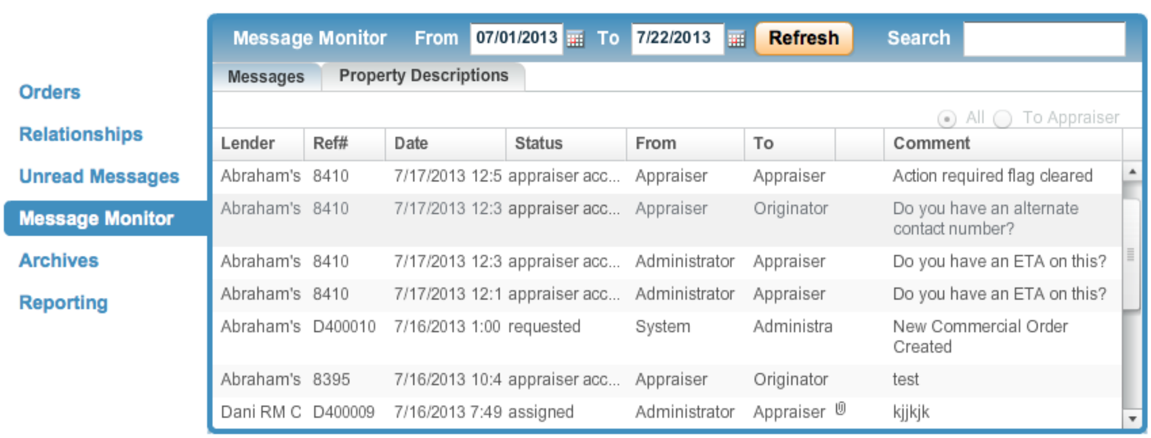


Unread Messages

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.

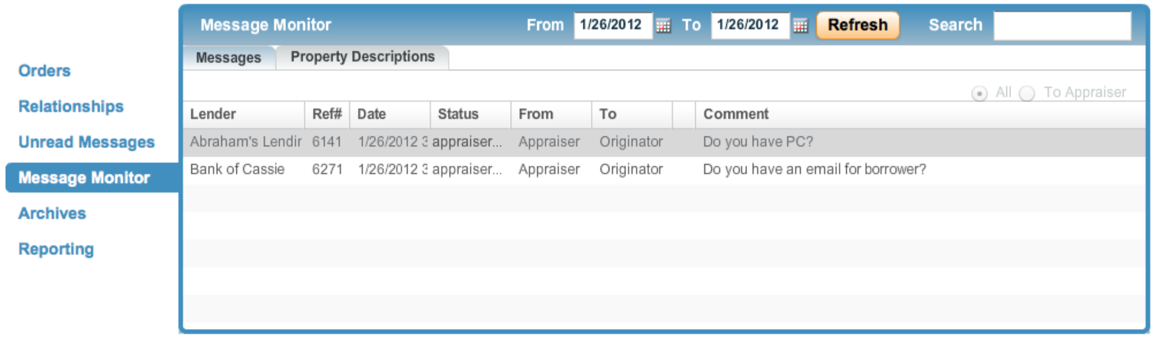
Message Monitor

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.



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.



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.