

Working in the Appraisal Firewall Orders Dashboard

A Guide for Managers

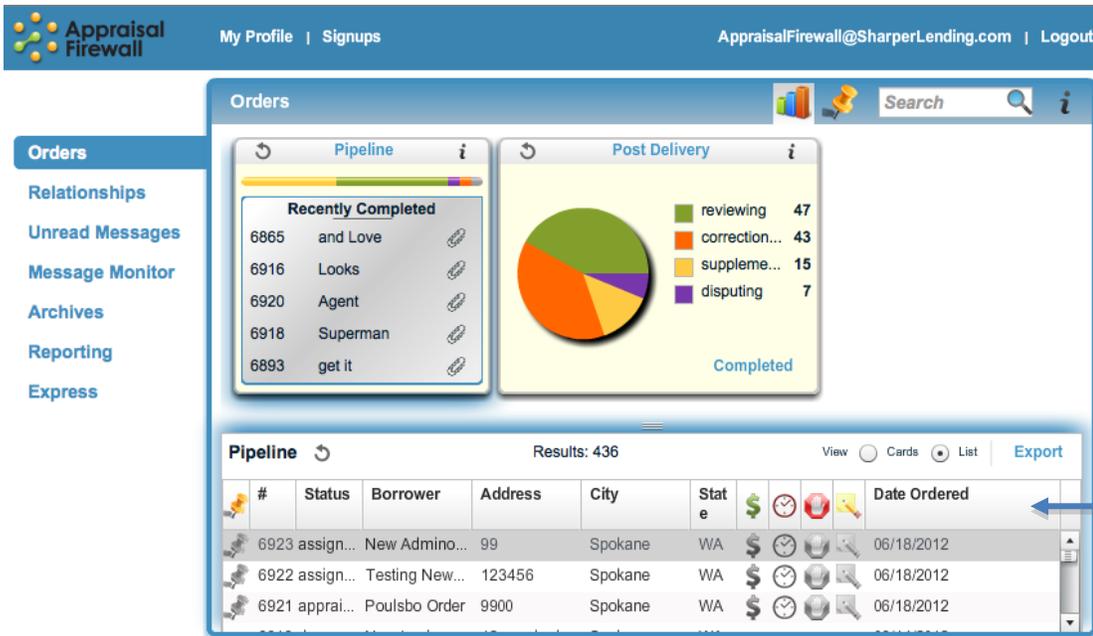
The Appraisal Firewall Orders Dashboard was designed to give users fast and easy access to their orders while also offering management tools to improve workflow. You are automatically presented with all your clients' active orders when you log in, but can quickly filter to view orders in a specific status to efficiently find just what you are looking for. Read the below guide for detailed instructions on working within the Orders Dashboard.

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Orders

When you log into your Appraisal Firewall account, the Orders list automatically displays all your clients' Pipeline orders. The Pipeline is composed of all your clients' active orders that do not have a completed appraisal. You can use this view to quickly locate, review, and work within any order.

You may also choose to view Post Delivery orders which displays active orders that have a completed report associated with them.



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Orders

Recently Completed

6865	and Love
6916	Looks
6920	Agent
6918	Superman
6893	get it

reviewing 47
correction... 43
suppleme... 15
disputing 7

Completed

Pipeline Results: 436 View Cards List Export

#	Status	Borrower	Address	City	State	Date Ordered
6923	assign...	New Admino...	99	Spokane	WA	06/18/2012
6922	assign...	Testing New...	123456	Spokane	WA	06/18/2012
6921	apprai...	Poulsbo Order	9900	Spokane	WA	06/18/2012

Sort orders by any column header.

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 (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.

You can view all your orders at any given time by clicking the magnifying glass icon in the Search field.

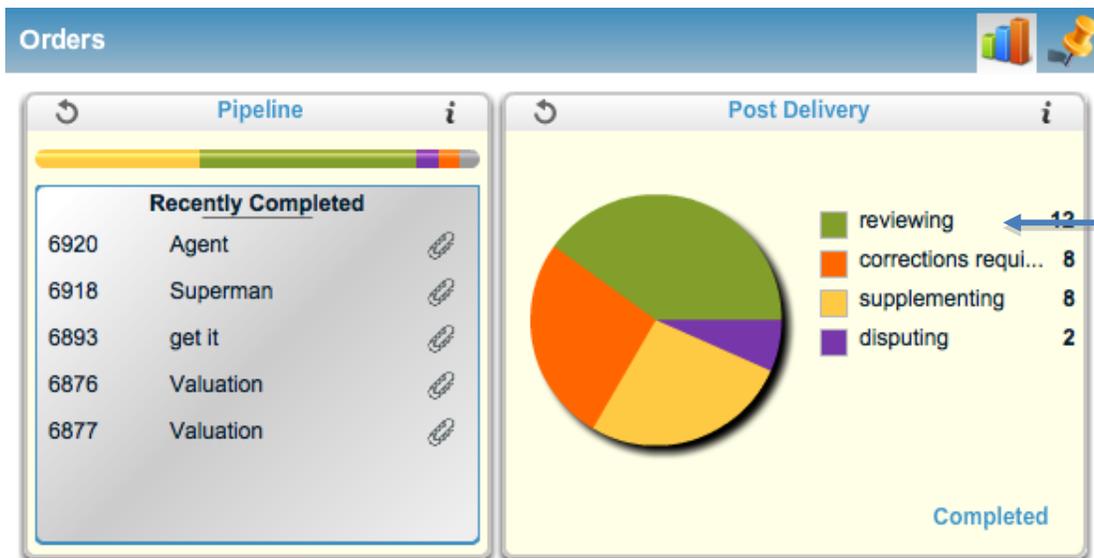
- Pinned**  – Represented by a thumbtack icon, you can pin an order to keep better track of it. Use it as a reminder for orders that require an action or attention. Click a gray thumbtack icon to pin an order. Click on the Pin column header to quickly view all pinned orders. Simply click a colored thumbtack to unpin it. *These Pinned orders will be in your "Pinned Orders" view as a filter - this is explained below in the Pinned Orders section.*

- **#** - Displays the Appraisal Firewall reference number associated with the order.
- **Status** – Displays the current status of the order.
 - **Requested** – Orders that have been placed but are not assigned to an appraiser.
 - **Assigned** - Orders in an ‘Assigned’ status have not yet been accepted by an appraiser.
 - **Appraiser Accepted (set by appraiser)** – This status indicates that an appraiser has accepted the order and set a price.
 - **Attempting to Schedule Inspection (set by appraiser)** – Indicates that the appraiser has tried to make contact to schedule an inspection.
 - **Scheduled Inspection (set by appraiser)** – The appraiser has set the date and time of the inspection.
 - **Completed Site Inspection (set by appraiser)** – Indicates that the appraiser has inspected the property.
 - **Completing Final (set by appraiser)** – The appraiser is completing the report.
 - **Done** – Indicates that the appraiser has delivered the report on the order.
 - **Reviewing** – Depending on a client’s settings, there may be a review performed on the appraisal after an appraiser uploads it (reviews are performed by a manual reviewer, UAD check, or UCDP submission).
 - **Corrections Required** – If a review is performed, an appraiser may be required to make edits to the report.
 - **Disputing** – Lenders may dispute the value on a completed report, and request more information on comparables mentioned in the report.
 - **Supplementing** – When a lender requests more information or additional products from an appraiser, the lender may place the order in a supplementing status. They will need to work with the appraiser to let them know what additional information is needed.
 - **Cancelled Orders** – You or a lender can cancel an order anytime prior to the report being uploaded. Appraisers have 24 hours to set a cancellation fee once it has been cancelled.
- **Borrower** – Displays borrower’s first and last name.
- **Address/City/State**– View and sort by the location of the property.
- **Price Change Indicator**  – View and sort orders that have a price change pending (indicated by dollar sign icon). When the dollar sign is green in color, this means that order has a price change request that is pending on it. When it is grayed out, the order does not have a pending price change request on it.
- **Overdue**  – The clock icon can be used to locate orders that are overdue. When the clock icon is colored in red, this means that order is past due based on the lender’s requested due date. When this icon is grayed out, the order is not overdue.

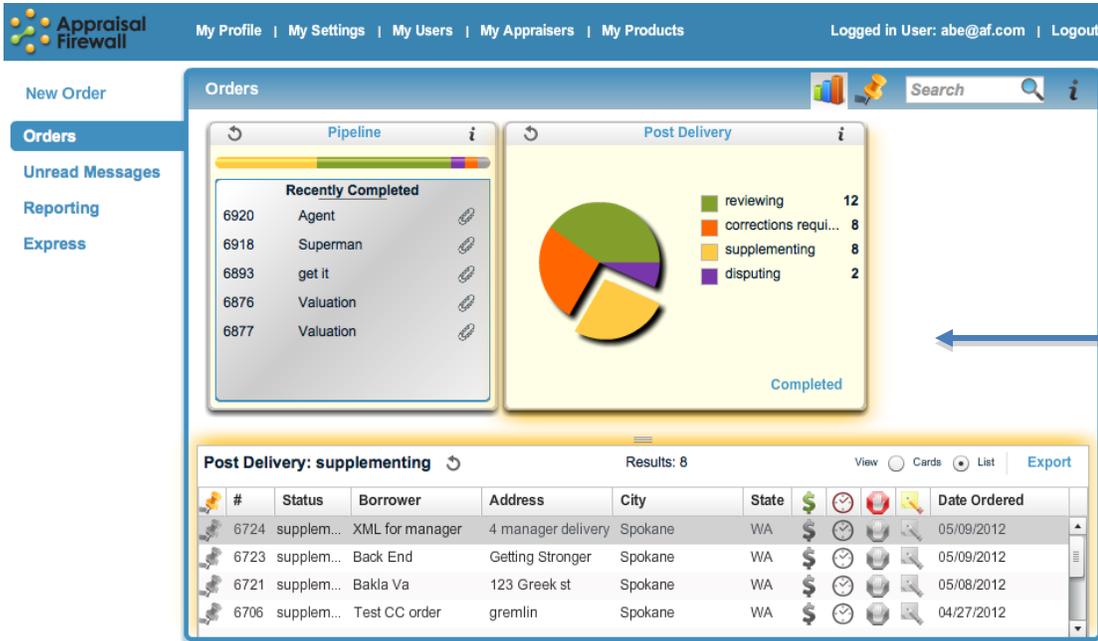
- **On Hold**  – The stop sign/hand icon indicates whether or not the order has been placed on hold by you as the manager. When the stop sign is red, this means the order is currently On Hold. When it is grayed out, the order is not on hold. Only managers can mark an order as 'on hold.'
- **Notes**  – The pencil icon indicates whether or not you have placed a note on the order. When the pencil icon is yellow, the order has a note on it. When it is grayed out, there are no notes on that order.
- **Date Ordered** – Sort orders by the date they were originally ordered.

Dashboard

The Dashboard mode, as indicated by the graphing icon, displays management tools to help you quickly locate and view specific order types and is your default view when you log in. The management tools are broken down into **Pipeline** and **Post Delivery** orders so that you can compartmentalize orders and manage them easier.



Click on a section of a pie chart to narrow down your orders list to display only the selected order type (scheduled inspection, completing final, corrections required, etc).



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Orders

Recently Completed

6920	Agent
6918	Superman
6893	get it
6876	Valuation
6877	Valuation

Post Delivery

reviewing	12
corrections requi...	8
supplementing	8
disputing	2

Completed

Post Delivery: supplementing Results: 8

#	Status	Borrower	Address	City	State	Date Ordered
6724	supplem...	XML for manager	4 manager delivery	Spokane	WA	05/09/2012
6723	supplem...	Back End	Getting Stronger	Spokane	WA	05/09/2012
6721	supplem...	Bakla Va	123 Greek st	Spokane	WA	05/08/2012
6706	supplem...	Test CC order	gremlin	Spokane	WA	04/27/2012

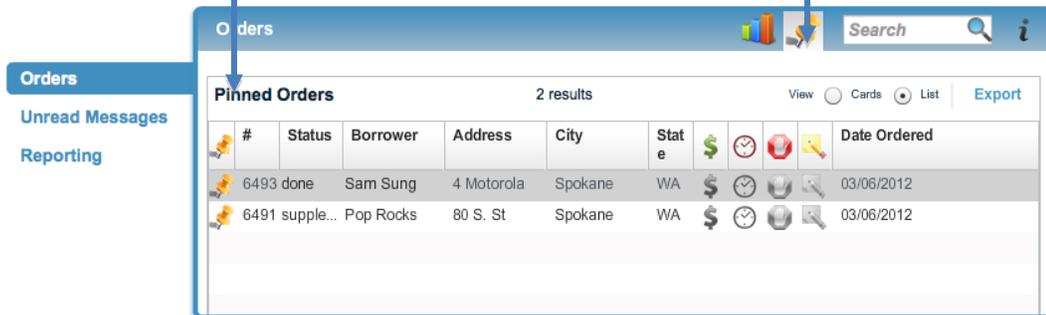
Selecting 'supplementing' in the pie chart filters orders in your list to orders in a supplementing status.

Pinned Orders

Next to the Dashboard icon is the Thumbtack icon. Click on it to view Pinned Orders. Any orders you have pinned in other lists are displayed here. Quickly review at a glance these orders that you have marked for closer monitoring.

Click on a thumbtack icon to pin/unpin an order.

Click on the thumbtack icon to quickly view all your pinned orders.



Orders

Pinned Orders Results: 2

#	Status	Borrower	Address	City	State	Date Ordered
6493	done	Sam Sung	4 Motorola	Spokane	WA	03/06/2012
6491	supple...	Pop Rocks	80 S. St	Spokane	WA	03/06/2012

Search

Use the Search field to locate specific orders. You can search by borrower last name, property address, city, state, zip code or reference number. The Search field will limit to the list you have in view. Hit your keyboard Enter key or click the magnifying glass to expand the search to all orders.

Info

The Information icon will provide you with a basic overview of the features available to you on your dashboard for quick reference.

Helpful tips on working in the dashboard:

- To view all your orders at any given time, click the magnifying glass in the Search field.
- View all your completed orders by clicking the Completed link on the Post Delivery management tool.
- You can export orders on a particular list displayed by using the Export link. An exported list appears as a .csv file that can be saved to your local computer.
- By default, Appraisal Firewall displays your orders in a list format. To view orders as order card icons, click the Card radio button. Appraisal Firewall will remember this setting so the next time you log in, it will default to card view.
- When searching for orders via the Search field, hit the enter key or click the magnifying glass to include all orders in the search.