

Working in the Appraisal Firewall Orders Dashboard

A guide for lenders

The Appraisal Firewall Orders Dashboard was designed to give lenders fast and easy access to their orders while also offering management tools to improve workflow. You are automatically presented with all your active orders when you log in, but can quickly filter your orders into 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.

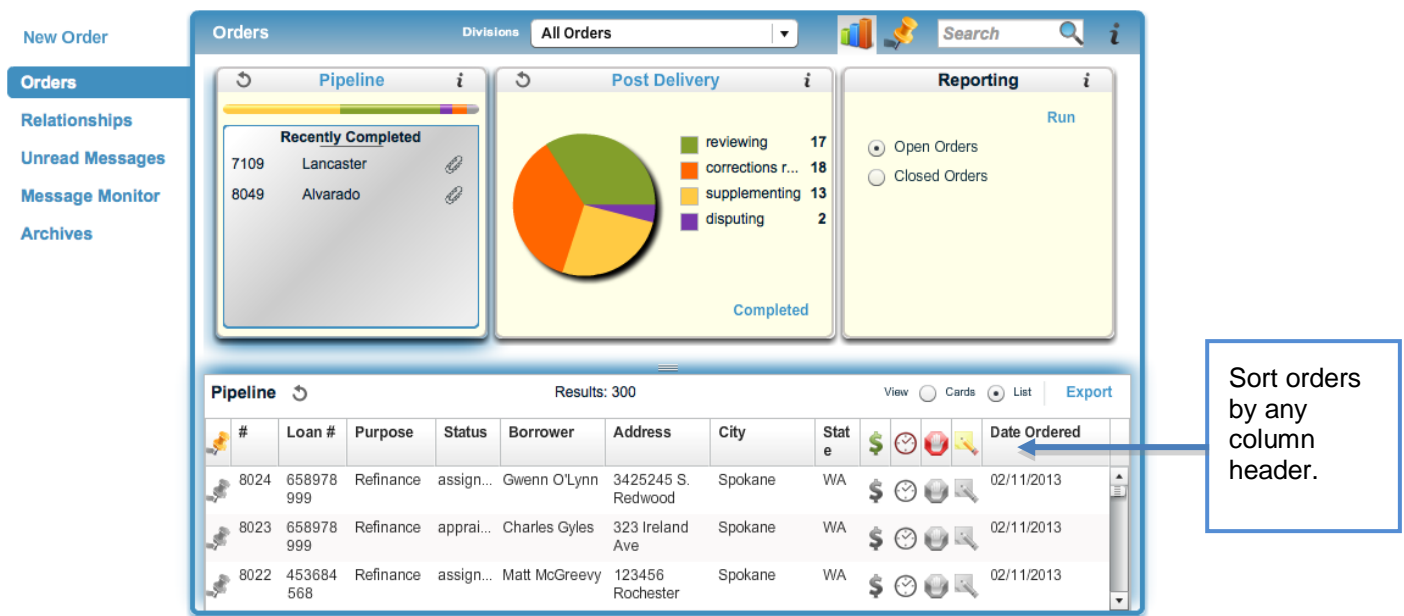
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Orders

When you log into your Appraisal Firewall account, the Orders list automatically displays all your Pipeline orders. The Pipeline is composed of all your 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 your Post Delivery orders which displays active orders that have a completed report associated with them.

The Reporting tool allows you to run reports specific to your company to help with billing and monitor user and appraiser performance.








The screenshot displays the 'Orders' management interface. On the left is a sidebar with navigation links: 'New Order', 'Orders', 'Relationships', 'Unread Messages', 'Message Monitor', and 'Archives'. The main content area is titled 'Orders' and includes a 'Divisions' dropdown set to 'All Orders' and a search bar. It features three management tools: 'Pipeline' (showing a 'Recently Completed' list with items like 7109 Lancaster and 8049 Alvarado), 'Post Delivery' (a pie chart with a legend for reviewing (17), corrections r... (18), supplementing (13), and disputing (2)), and 'Reporting' (a 'Run' button and radio buttons for 'Open Orders' and 'Closed Orders'). Below these is a 'Pipeline' table with 300 results. The table columns are: #, Loan #, Purpose, Status, Borrower, Address, City, State, and Date Ordered. A callout box points to the 'Date Ordered' column header with the text 'Sort orders by any column header.'

#	Loan #	Purpose	Status	Borrower	Address	City	State	Date Ordered
8024	658978 999	Refinance	assign...	Gwenn O'Lynn	3425245 S. Redwood	Spokane	WA	02/11/2013
8023	658978 999	Refinance	apprai...	Charles Gyles	323 Ireland Ave	Spokane	WA	02/11/2013
8022	453684 568	Refinance	assign...	Matt McGreevy	123456 Rochester	Spokane	WA	02/11/2013

You can choose 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 All Orders view is the default view whenever you log into your Appraisal Firewall account. You can sort by any of the columns within any orders list.

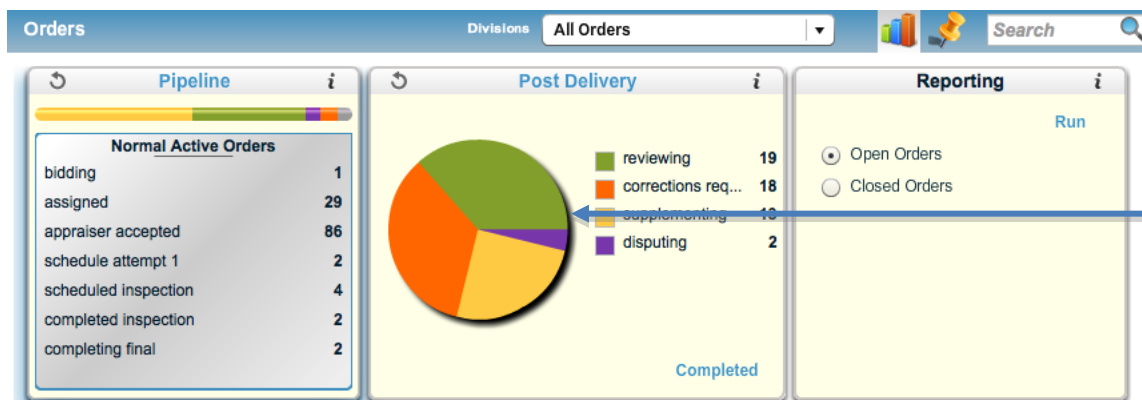
You can view all your orders at any given time by clicking the magnifying glass icon in the Search field.

- **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.
 - **Payment review** – Credit card orders with payment issues are placed in a payment review status. Please enter new credit card information for the order to progress.
 - **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)** – Notifies you 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 your 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** – You may dispute the value on a completed report, and request more information on comparables mentioned in the report.
 - **Supplementing** – When you request more information or additional products from an appraiser, you may place the order in a supplementing status. Work with your appraiser to let them know what additional information you require.
 - **Cancelled Orders** – You 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 your account 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.
- **Notes**  – the pencil icon indicates whether or not this order has a note on it. 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.

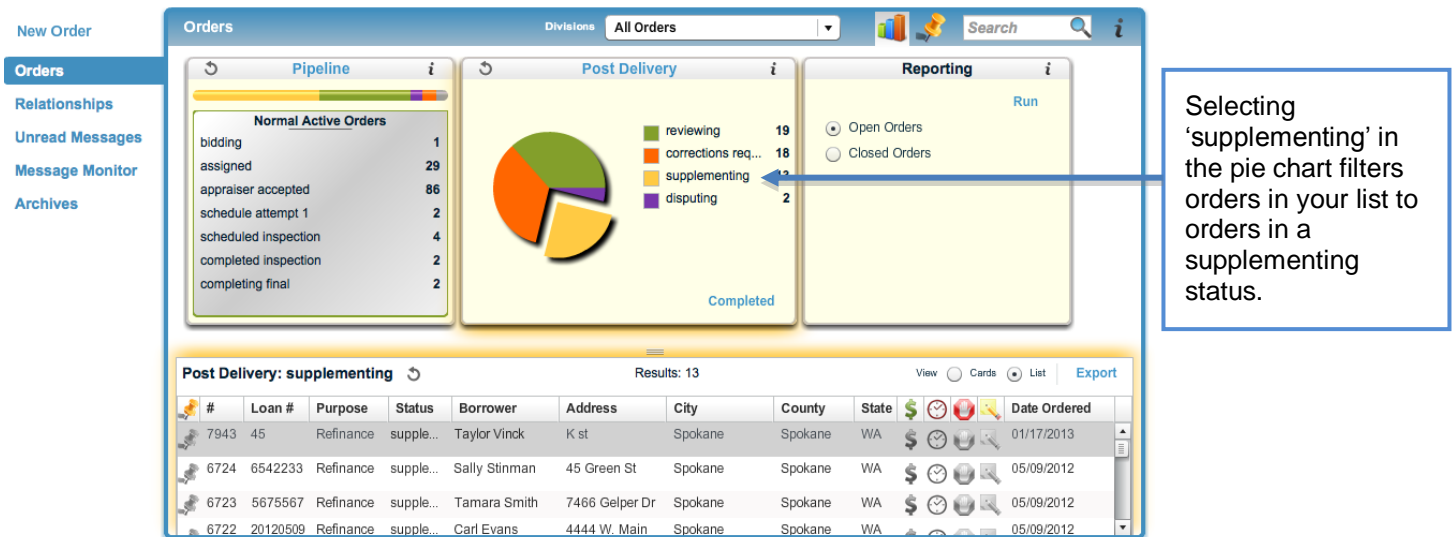
Dashboard

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 your **Pipeline** and **Post Delivery** orders so that you can compartmentalize orders and manage them easier, and also a **Reporting** tool to help manage billing.



Use the pie charts to filter down to specific orders.

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).



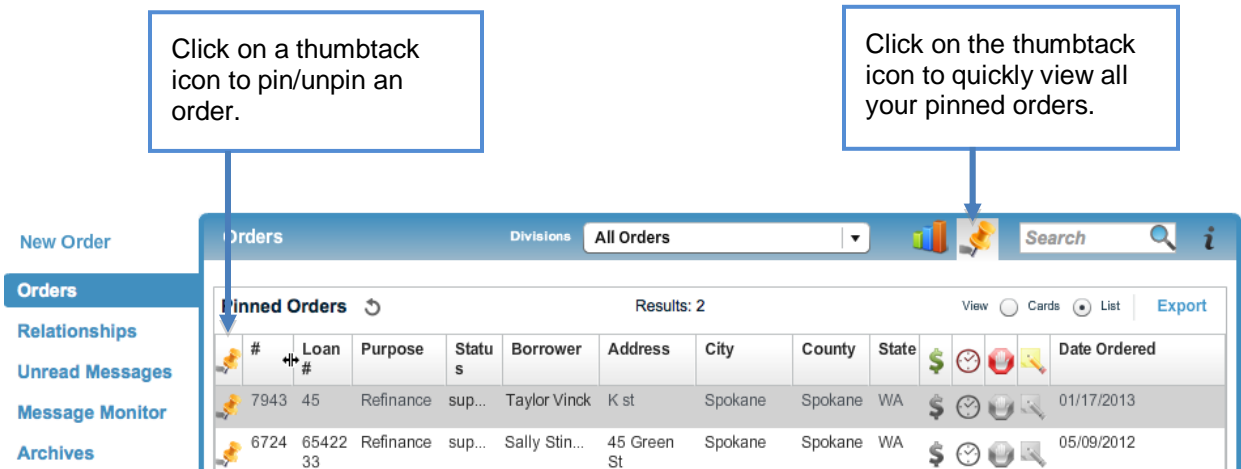
The screenshot shows the 'Orders' dashboard. On the left is a navigation menu with 'Orders' selected. The main area has three panels: 'Pipeline', 'Post Delivery', and 'Reporting'. The 'Post Delivery' panel contains a pie chart with a legend: reviewing (19), corrections req... (18), supplementing (13), and disputing (2). A blue arrow points from the 'supplementing' slice to a callout box. Below the pie chart is a table titled 'Post Delivery: supplementing' with 13 results. The table columns are: #, Loan #, Purpose, Status, Borrower, Address, City, County, State, \$, and Date Ordered.

#	Loan #	Purpose	Status	Borrower	Address	City	County	State	\$	Date Ordered
7943	45	Refinance	supple...	Taylor Vinck	K st	Spokane	Spokane	WA	\$	01/17/2013
6724	6542233	Refinance	supple...	Sally Stinman	45 Green St	Spokane	Spokane	WA	\$	05/09/2012
6723	5675567	Refinance	supple...	Tamara Smith	7466 Gelper Dr	Spokane	Spokane	WA	\$	05/09/2012
6722	20120509	Refinance	supple...	Carl Evans	4444 W. Main	Spokane	Spokane	WA	\$	05/09/2012

Callout box text: "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.



The screenshot shows the 'Pinned Orders' view. The top navigation bar includes a thumbtack icon. Below it is a table titled 'Pinned Orders' with 2 results. The table columns are: #, Loan #, Purpose, Status, Borrower, Address, City, County, State, \$, and Date Ordered.

#	Loan #	Purpose	Status	Borrower	Address	City	County	State	\$	Date Ordered
7943	45	Refinance	sup...	Taylor Vinck	K st	Spokane	Spokane	WA	\$	01/17/2013
6724	6542233	Refinance	sup...	Sally Stin...	45 Green St	Spokane	Spokane	WA	\$	05/09/2012

Callout box 1: "Click on a thumbtack icon to pin/unpin an order." (points to the thumbtack icon in the table header)

Callout box 2: "Click on the thumbtack icon to quickly view all your pinned orders." (points to the thumbtack icon in the top navigation bar)

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 *i*

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.