

Working in the Appraisal Firewall Orders Dashboard

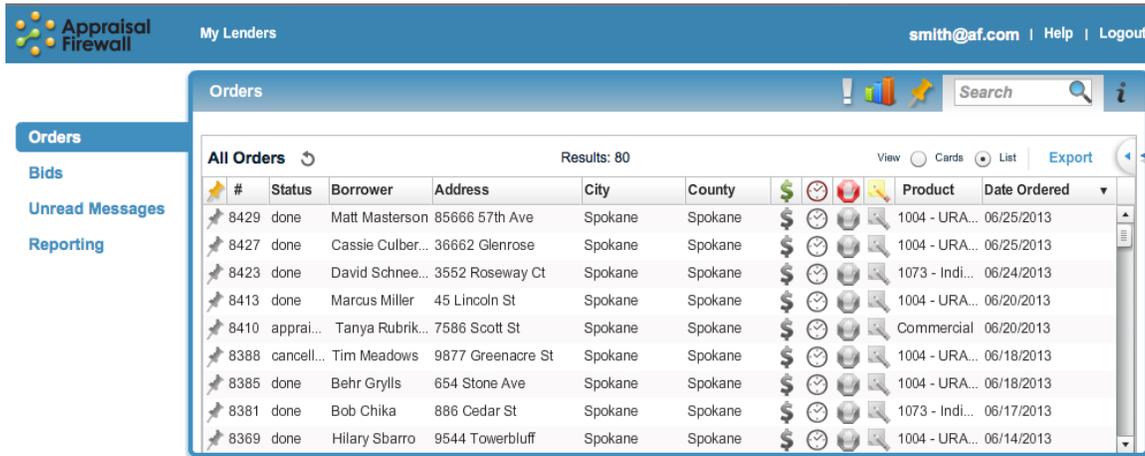
A guide for appraisers

The Appraisal Firewall Orders Dashboard was designed to give appraisers fast and easy access to their orders while also offering management tools to improve workflow. You are automatically presented with all your recent orders when you log in, but can quickly filter your orders into a specific status to quickly 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 orders. You can use this view to quickly locate, review, and work within any order.



My Lenders smith@af.com | Help | Logout

Orders Search

All Orders Results: 80 View Cards List Export

#	Status	Borrower	Address	City	County	Loan #	Purpose	Product	Date Ordered
8429	done	Matt Masterson	85666 57th Ave	Spokane	Spokane	\$	📌	1004 - URA...	06/25/2013
8427	done	Cassie Culber...	36662 Glenrose	Spokane	Spokane	\$	📌	1004 - URA...	06/25/2013
8423	done	David Schnee...	3552 Roseway Ct	Spokane	Spokane	\$	📌	1073 - Indi...	06/24/2013
8413	done	Marcus Miller	45 Lincoln St	Spokane	Spokane	\$	📌	1004 - URA...	06/20/2013
8410	apprai...	Tanya Rubrik...	7586 Scott St	Spokane	Spokane	\$	📌	Commercial	06/20/2013
8388	cancell...	Tim Meadows	9877 Greenacre St	Spokane	Spokane	\$	📌	1004 - URA...	06/18/2013
8385	done	Behr Grylls	654 Stone Ave	Spokane	Spokane	\$	📌	1004 - URA...	06/18/2013
8381	done	Bob Chika	886 Cedar St	Spokane	Spokane	\$	📌	1073 - Indi...	06/17/2013
8369	done	Hilary Sbarro	9544 Towerbluff	Spokane	Spokane	\$	📌	1004 - URA...	06/14/2013

Sort orders by any column header or modify the columns you can view.

All Orders

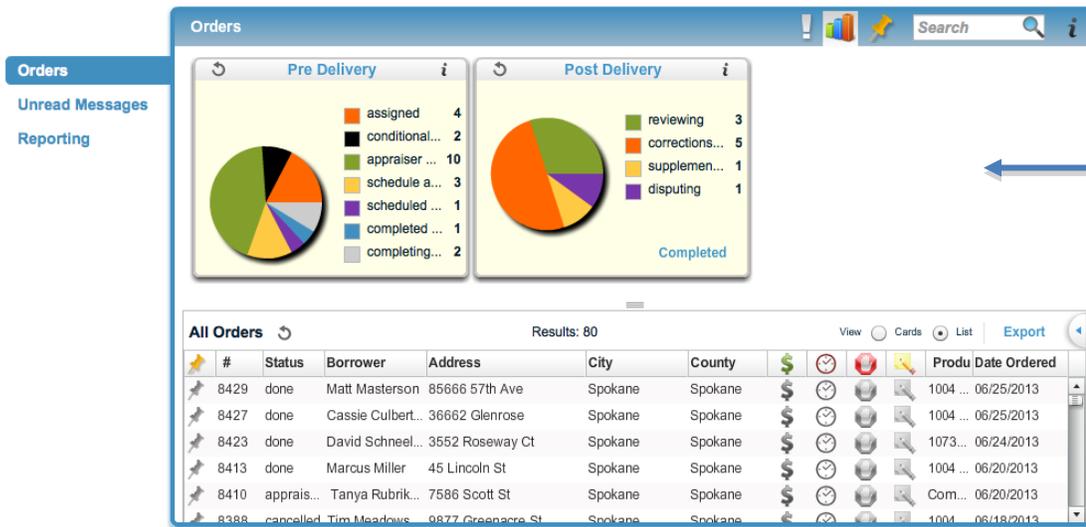
The All Orders view is the default view whenever you log into your Appraisal Firewall account. You can sort by any of the columns within any orders list.

- **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.
- **Loan #** - Displays the loan number assigned to the order by the lender.
- **Purpose** – View the reason for the loan (refinance, purchase, etc).
- **Status** – Displays the current status of the order.
 - **Assigned** - Orders in an 'Assigned' status have not yet been accepted. Depending on your lender's settings, you have 24 hours to accept an order before it is automatically reassigned.
 - **Payment Review** – Payment processing errors cause an order to go into a payment review status. Please refrain from working on the order until you receive notification that payment issues have been resolved.
 - **Appraiser Accepted** – This status indicates that you have accepted the order and set a price.

- **Attempting to Schedule Inspection** – Alerts your lender that you have tried to make contact to schedule inspection.
 - **Scheduled Inspection** – You can set the date and time of the inspection.
 - **Completed Site Inspection** – Displays that you have inspected the property.
 - **Completing Final** – You have set the status indicating you are completing the report.
 - **Done** – Indicates that you have delivered the report on the order.
 - **Reviewing** – Depending on the lender's settings, there may be a review performed on the appraisal after you upload it. You will receive an email if further action is required on your part.
 - **Corrections Required** – If a review is performed, you may be requested to do additional work. Consult the Communications Log of the order to view what corrections should be addressed.
 - **Disputing** – Your lender 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 you, they will request the order be supplemented. Work with your lender to see what additional information they require.
 - **Cancelled Orders** – Your lender can cancel an order anytime prior to its completion. You have 24 hours to set a cancellation fee once it has been cancelled.
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- **Borrower** – Displays borrower's first and last name.
 - **Address/City/County/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.
 - **Other** –  There are other column headers available to help you filter and sort your orders. Click the icon to view more columns, add new ones, and remove others to avoid clutter. You can drag and drop the columns to move them to a different location so you can customize the view of your orders.

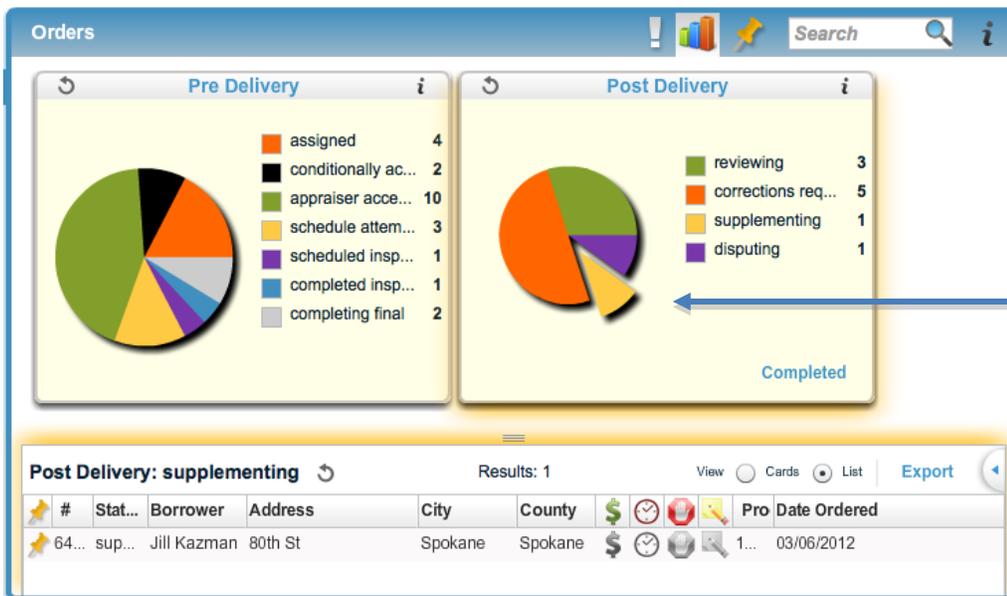
Dashboard

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



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).



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

Pinned Orders

To the left of the Search field 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.

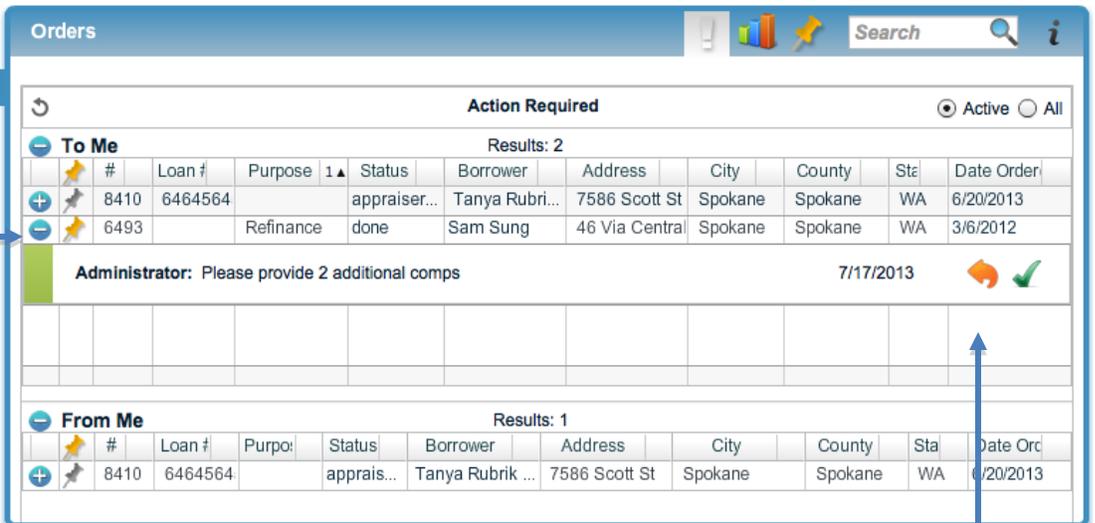


The screenshot shows the 'Orders' section of the Appraisal Firewall interface. The 'Pinned Orders' section is active, displaying two results. The table below shows the details of these orders:

#	Status	Borrower	Address	City	County	Product	Date Ordered
6493	done	Sam S...	46 Via Centralia	Spokane	Spokane	1004 - URA...	03/06/2012
6491	supplem...	Jill Kaz...	80th St	Spokane	Spokane	1004 - URA...	03/06/2012

Action Required

Whenever you or your lenders send a message, you can mark it as 'Action Required,' indicating that a response is needed. The Action Required tool lets you quickly view and track orders that have Action Required messages pending. Within the Action Required window you can respond to Action Required messages sent to you, plus view Action Required messages that are awaiting a response from the lender.



Expand a message to view and respond to it.

Use the action arrow to respond to the message.

You can use the Action Required tool to manage orders that may need your immediate attention. To respond to an action required message, expand the order by clicking the '+' icon along the left. Next, click the orange arrow and respond to the message directly from this screen. You can also respond to Action Required messages by accessing the order from your main orders dashboard.

To view past Action Required messages that have been addressed or cleared from the list, click the All radio button.

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 time, click the magnifying glass in the Search field. Until you switch back to the dashboard icon, your All Orders list (without the Pipeline charts) will be your default view whenever you log in.
- 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.