

Appraisal Firewall Quick Start Guide

For Originators and Supervisors

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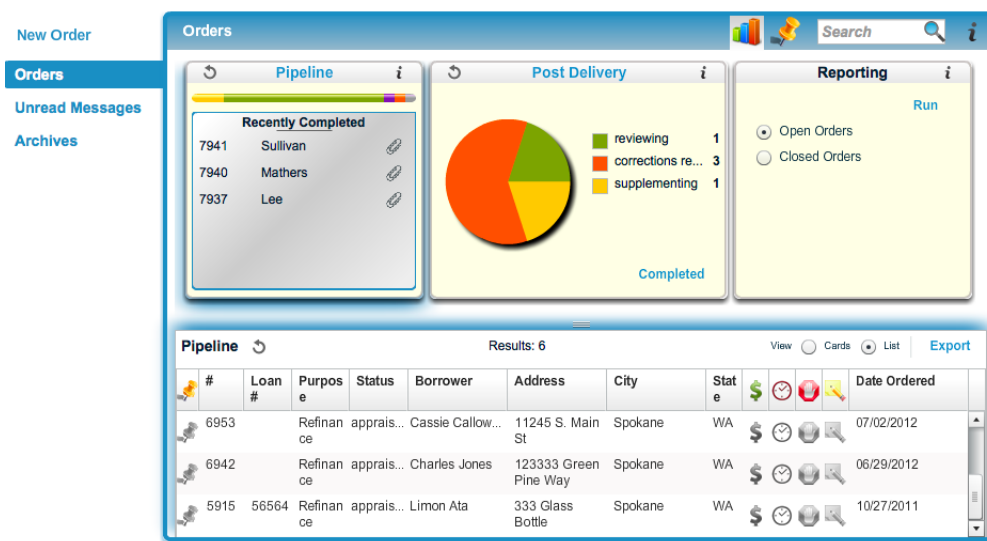
Basic Usage and Layout

Use the action links along the top and left hand side of your account to perform specific actions in Appraisal Firewall: view and edit your account **Profile** by clicking your email address in the upper right, **Logout** of your account, view an overview of your company information with the **Lender Profile** link, create a **New Order**, view all your existing **Orders**, read **Unread Messages**, and work with older orders in **Archives**.



The **Orders** section contains all of your appraisal orders. You can use the Pipeline and Post Delivery management tools to filter your search to specific order types. Double click on an order within any list to open it and review the order information. When complete, you can access the appraisal PDF report from within an Order.

Run a management report from the **Reporting** tool to track and manage **Open Orders** (not yet completed) and **Closed Orders** (completed orders that are ready to bill).



#	Loan #	Purpose	Status	Borrower	Address	City	State		Date Ordered
6953		Refinan apprais...		Cassie Callow...	11245 S. Main St	Spokane	WA	\$	07/02/2012
6942		Refinan apprais...		Charles Jones	123333 Green Pine Way	Spokane	WA	\$	06/29/2012
5915	56564	Refinan apprais...		Limon Ata	333 Glass Bottle	Spokane	WA	\$	10/27/2011

The bottom of the screen contains Appraisal Firewall Customer Service contact information in case you need to contact us with questions. The bottom-right of the screen contains the type of user that you are logged in as.

Please note: If you work within multiple divisions of your company, or if you are a supervisor user type, you can view and work within orders specific to each division by accessing the drop down menu next to the Search field (not pictured in screenshot above).

My Profile

You can access your personal account profile by clicking on the email address at the upper right hand side of your account. With **My Profile**, you can view and edit your personal information, including first and last name, login information, and address.

My Profile Cancel Done

Your Contact Information

Name

Email (this will be your login)

Password Password confirmed Phone Cell

Company Name

Address

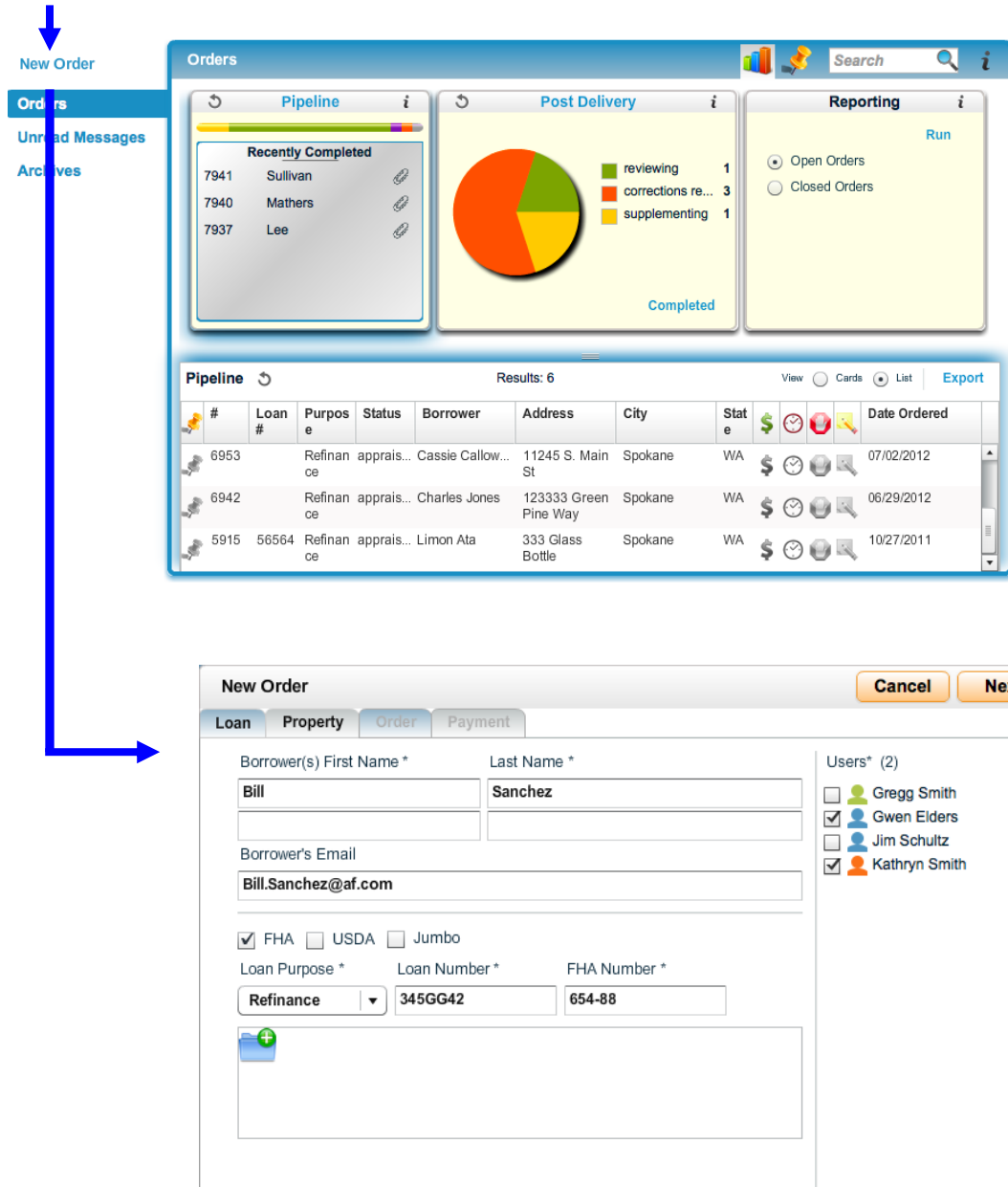
City (city and state looked up based on zip code) State Zip

View Contract I agree to the terms

Setup 10/27/2011 2:41:05 PM

New Order

Click the **New Order** link at left to order an appraisal. You'll be prompted to enter basic property and loan information, select the appraisal product, and indicate the type of payment. The order is placed anonymously to an appraiser in your account manager's panel.



The screenshot shows the 'Orders' dashboard with a sidebar on the left containing 'New Order', 'Orders', 'Unread Messages', and 'Archives'. A blue arrow points from 'New Order' to the 'New Order' form below. The dashboard includes sections for 'Pipeline', 'Post Delivery', and 'Reporting'. The 'Pipeline' section shows a table of orders with columns for #, Loan #, Purpose, Status, Borrower, Address, City, State, and Date Ordered. The 'Post Delivery' section shows a pie chart with categories: reviewing (1), corrections re... (3), and supplementing (1). The 'Reporting' section has radio buttons for 'Open Orders' and 'Closed Orders'.

#	Loan #	Purpose	Status	Borrower	Address	City	State	Date Ordered
6953		Refinance	appraisal	Cassie Callow...	11245 S. Main St	Spokane	WA	07/02/2012
6942		Refinance	appraisal	Charles Jones	123333 Green Pine Way	Spokane	WA	06/29/2012
5915	56564	Refinance	appraisal	Limon Ata	333 Glass Bottle	Spokane	WA	10/27/2011

The 'New Order' form has tabs for 'Loan', 'Property', 'Order', and 'Payment'. It includes fields for Borrower(s) First Name (Bill), Last Name (Sanchez), and Borrower's Email (Bill.Sanchez@af.com). There are checkboxes for FHA, USDA, and Jumbo. The Loan Purpose is set to 'Refinance', Loan Number is '345GG42', and FHA Number is '654-88'. A list of users is shown on the right, with checkboxes for Gregg Smith, Gwen Elders, Jim Schultz, and Kathryn Smith.

[Click Here for a Demo of Placing a New Order](#)

Unread Messages

The Unread Messages window gives you a quick view of all messages that go back and forth between you and appraisers you are working with. Double-click on any message to open that specific order. These are anonymous messages – you will not be able to view appraiser information from these messages. Please direct questions regarding communications to your account manager.

[New Order](#)

[Orders](#)

[Unread Messages](#)

[Archives](#)

Unread Messages Get Messages						
Date/Time	From	Type	Borrower	Street	Comment	
1/17/2013 3:54:26 PM	System	Status Set	Matthew Sullivan	UCDP madness	Completed	
1/17/2013 3:54:23 PM	Appraiser	Delivery XML	Matthew Sullivan	UCDP madness	Appraisal MISMO XML Delivery	
1/17/2013 3:54:23 PM	Appraiser	Delivery	Matthew Sullivan	UCDP madness	Appraiser Report Delivery	
1/17/2013 3:53:01 PM	System	Status Set	Matthew Sullivan	UCDP madness	Accepted by the appraiser	
1/17/2013 3:52:44 PM	Rotation Manager	Requested	Matthew Sullivan	UCDP madness	Request added	
1/17/2013 3:38:49 PM	System	UCDP Submission Result	Suzanne Mathers	Alaska	Not Accepted	
1/17/2013 3:36:25 PM	Customer Service	UCDP Submission	Suzanne Mathers	Alaska	UCDP Submission	
1/17/2013 3:36:14 PM	System	Status Set	Suzanne Mathers	Alaska	Completed	
1/17/2013 3:36:14 PM	Appraiser	Delivery XML	Suzanne Mathers	Alaska	Appraisal MISMO XML Delivery	
1/17/2013 3:36:14 PM	Appraiser	Delivery	Suzanne Mathers	Alaska	Appraiser Report Delivery	
1/17/2013 3:35:39 PM	System	Status Set	Suzanne Mathers	Alaska	Accepted by the appraiser	
1/17/2013 3:35:16 PM	Rotation Manager	Requested	Suzanne Mathers	Alaska	Request added	
1/17/2013 2:04:49 PM	System	UCDP Submission	Ong Lee	UCDP access	Accepted	

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.

[New Order](#)

[Residential](#)

[Commercial](#)

[Orders](#)

[Unread Messages](#)

[Archives](#)

Archives - specific

 Auto Open
 Restore
Search

#	Borrower	Address	City	State
7940	Suzanne Mathers	1122 N. Main	Spokane	WA

Working in an Order

From the Order List, click on an order card to open an appraisal so that you can view the details about that order.

Details - Josiah Collins at 1122 S. Main St Spokane ...						Price \$400.00	Done
Order Communicate View							
Status: appraiser accepted Reference Number: 7871							
Property		Communications			DocFileID: N/A Fannie Mae:N/A Freddie Mac:N/A		
View: <input checked="" type="checkbox"/> All <input type="checkbox"/> UCDP <input type="checkbox"/> Messages <input type="checkbox"/> Appraisals/Attachments <input type="checkbox"/> Timeline							
Date/Time	From	To	Type	Actions	Comment	\$	
1/9/2013 11:52:07 AM	Originator Suzanne Walker	Appraiser	Message		Is there an ETA?		
1/9/2013 11:51:09 AM	Rotation Manager Abraham Stuart	Originator	User Added		Suzanne Walker		
1/9/2013 11:22:04	System		Status Set		Accepted by the appraiser	\$400.00	

The basic order layout includes menu options along the top along the blue bar. These menus include the **Order** menu, the **Communicate** menu, and the **View** menu.

The **Order** menu offers a number of appraisal order-specific options that are available depending on the type of user that is viewing the order.

- ◆ **Manage Parties** – This allows you to view and edit the users that are associated with the order. All selected parties receive email notifications regarding order and can access and work within it.
- ◆ **Order 2nd Appraisal** – This enables you to order a second appraisal on this property that will automatically be routed to a new appraiser. Use this feature when two appraisals are required for one property – such as an FHA flip. When selected, a New Order screen will appear, with property information automatically populated.
- ◆ **Order Reinspection** – Request for an appraiser’s reinspection of the property. This feature generates a new order that will be routed to the same appraiser as the original request. When selected, a New Order screen will appear, with property information automatically populated. You will need to re-enter credit card information if a credit card was used on the original order.
- ◆ **Linked Orders** - Track reinspection orders and second appraisals. The Linked Orders feature will be available for selection if there is either an order directly linked (such as for re-inspection) or if an order has the same loan number (such as for second appraisals).
- ◆ **Cancel Order** – This cancels the appraisal order. Cancellation/Trip fees may apply.
- ◆ **Billing Details** – This feature displays all accounting activity related to the order (service fees, price changes, receipts, etc).
- ◆ **Edit Details** – Users can modify order details such as address, due date, loan

number, and appraisal type. Appraisers are notified by email when a change is made to the order.

The **Communicate** menu offers a number of options to communicate with parties involved in the order.

- ◆ **Send Message** – This allows you to send messages and files to the appraiser and other users on the order.
- ◆ **Dispute Comps** – Available on completed orders, this feature allows you to dispute comps included on the report by the appraiser or request additional ones.
- ◆ **Forward Appraisal** – Available on completed orders, this is a compliance feature that allows you to send a copy of the appraisal to a Borrower or any third party who may need to view the completed appraisal (underwriters). Appraisal Firewall tracks whom the appraisal is sent to in the Communications Log and when it is viewed by the other party.
- ◆ **Send to UCDP** – Once activated by your account manager, this option is available only on completed orders. Choose this option to manually submit the uploaded appraisal report to UCDP.

The **View** menu allows you to access PDF documents relating to the appraisal. All options on the **View** menu are available after the order has been completed and returned to you.

- ◆ **Communications Log** – This displays a printable view of all messages and all activities that occurred on this order. You can print hardcopies of the log to go along with the loan file for compliance purposes to prove that no undue appraiser influence occurred.
- ◆ **Appraisal** – This allows you to view the completed appraisal.
- ◆ **Documents** – Hover over the Documents option to reveal any files (purchase contract, credit card authorization, appraiser invoice, etc) associated with the order. Click on any file to open it.
- ◆ **Invoice** – View all costs involved in this appraisal order and to whom they should be remitted. This includes an itemized breakout of applicable technology transaction fees, appraisal fees, and billing service fees.
- ◆ **Fannie Mae SSR/Freddie Mac SSR** – When a report is submitted to UCDP, Fannie/Freddie Submission Summary Reports are returned back to let you and the appraiser know if the appraisal has been accepted by UCDP or if the appraiser should modify the report.

Below the menu options, you will find the **Property** tab and the **Communications** tab.

- ◆ The **Property** tab contains all details about the subject property that were entered at the time of the order.
- ◆ The **Communications** tab displays a log of all messages, status changes, and activities that occurred on this appraisal. See the **View** menu and **Communications Log** entry to print off this log for hardcopy storage.

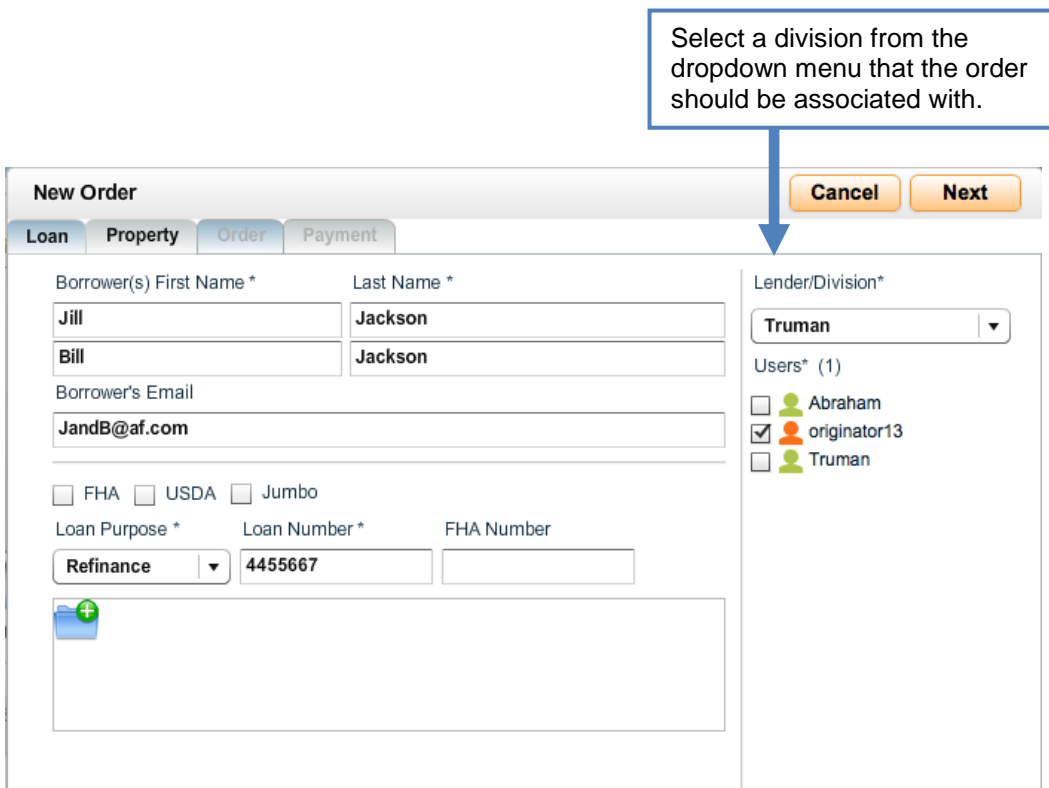
You may use the checkboxes beneath Communications tab to filter down the information you view in the Communications Log.

Working Within Multiple Divisions

Your account administrator may assign you to multiple divisions within your company if your company operates with more than one branch in Appraisal Firewall. All functionality remains the same, with some additional features that help you manage orders within the different divisions.

When your account is associated with multiple divisions, you must select a division when placing an order. The users associated with that division will automatically populate once a division is selected.

Select a division from the dropdown menu that the order should be associated with.



New Order

Cancel Next

Loan Property **Order** Payment

Borrower(s) First Name * Last Name *

Jill Jackson

Bill Jackson

Borrower's Email

JandB@af.com

FHA USDA Jumbo

Loan Purpose * Loan Number * FHA Number

Refinance 4455667

Lender/Division*

Truman

Users* (1)

Abraham

originator13

Truman