

# Working in the Appraisal Firewall Relationships Screen

## User Training Guide for Managers

The **Relationships** window is your guide to manage your clients' accounts, work within their orders, and oversee all your appraisers. With the **Relationships** window, all of the elements of managing users and appraisers have been placed in one easily accessible location. You can quickly track orders that your clients are placing and view appraiser trends.

You can select an existing lender to view the details on (including setting custom pricing), view orders just for that lender, plus add new lenders – all from the **Relationships** screen. You can also view the appraisers on a lender's appraiser panel and setup and view AMC information if a lender utilizes it.

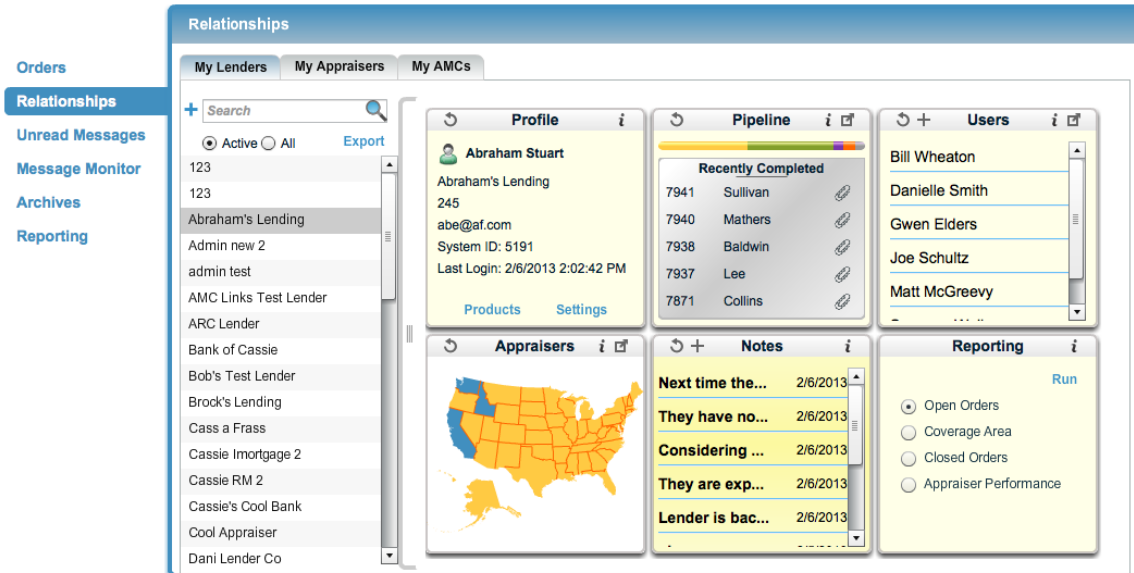
This document walks you through the details of working in the **Relationships** window - your dashboard into all lender and appraiser activity in Appraisal Firewall.

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## Overview

The Relationships tab is your guide into all your clients' and appraisers' accounts. The Relationships tab lets you enable settings and review company information on a per-lender basis. You are able to access and manage your lenders, appraisers, and AMC relationships. You can also view a summary of a selected user and any orders they have.



## My Lenders Tab

Use the My Lenders tab to manage your clients and their orders. View each of your clients' appraiser panels, orders, and profiles. You can manage orders, adjust lender-specific account settings, and edit billing items all in one location.

- **Add New Lender** – Located directly under the My Lenders tab, you can search for an existing client, or click the '+' icon next to the search field to add a new lender. When you add a new client, you will need to select the 'All' radio button in order to edit and view the client's information.
- **Lender List** – By default, only active lenders are displayed in your Lender List, located below the search field. This includes active clients who have at least one order in their Order List. To view all other clients, click the 'All' radio button.
- **Export** – This link will generate a spreadsheet of your list of lenders. The spreadsheet includes the email address and contact name at the client company.
- **Profile widget** – View the selected client's basic company information such as contact name, company address, and phone number.

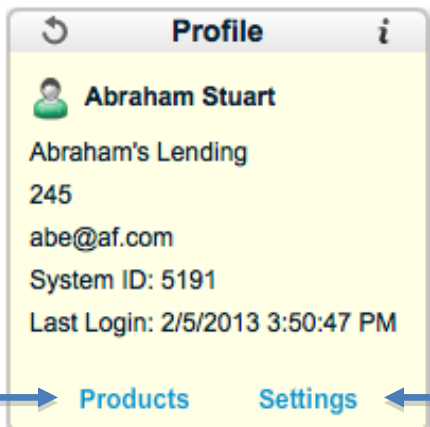
- **Products** – View and manage the products and prices that this client offers.
- **Settings** – Use this link to alter a company’s transaction fees, designate who pays for appraisal orders, and select more company-specific options. For detailed information on working in the Settings window, [click here](#).
- **Pipeline widget** – View the orders placed under this client and work within them.
- **Users widget** – View the users associated with the selected company. You may also add and remove users on behalf of the company.
- **Appraisers widget** – View the appraisers associated with the selected company. You can manage the lender’s appraiser panel by adding/removing appraisers, and modify an appraiser’s coverage area. For detailed information on working in the **Appraisers** screen, [click here](#).
- **Notes widget** – Create notes about working with this client to better manage your relationship. These notes are only available for your viewing.
- **Reporting widget** – Run management reports (open orders, coverage area, closed orders, appraiser performance) pertaining to the selected company.

## Interacting with Widgets

The My Users tab consists of several tools, or widgets, that provide you with a quick summary of a particular user’s account. You can use the icons on the widgets to modify the account, create notes, and work within the user’s orders.

### Profile Widget

The Profile widget gives you an overview of the selected user’s profile information including email address and name.



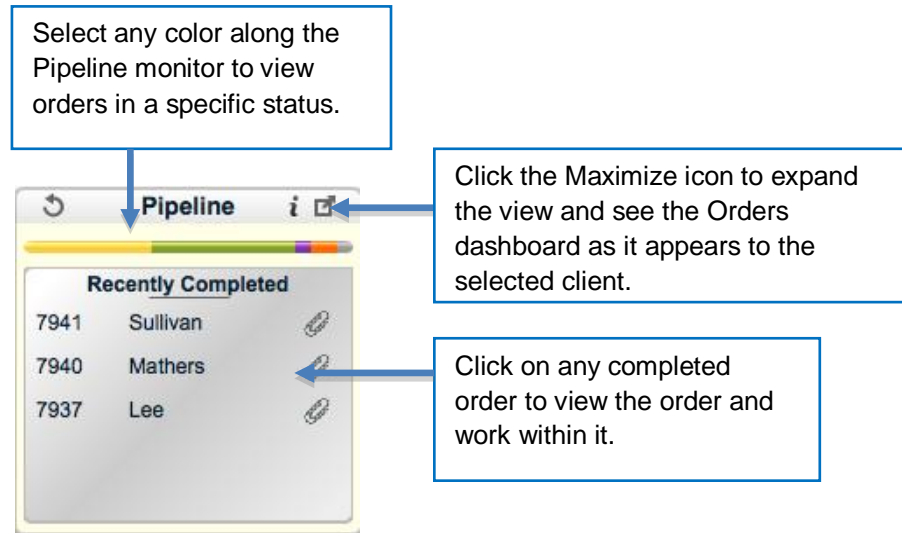
The screenshot shows a 'Profile' window for 'Abraham Stuart'. The window contains the following information: 'Abraham's Lending', '245', 'abe@af.com', 'System ID: 5191', and 'Last Login: 2/5/2013 3:50:47 PM'. At the bottom of the window are two buttons: 'Products' and 'Settings'. Two callout boxes are present: one on the left pointing to the 'Products' button, and one on the right pointing to the 'Settings' button.

Use the Products link to control the products and product pricing available to users under this company.

Modify the order settings, service fees, and other company specifics with the Settings window.

## Pipeline Widget

The Pipeline widget gives you a brief summary of the selected company's active orders. You can view an outline of all the client's pre-delivery orders plus view recently delivered reports in the Recently Completed section of the Pipeline.

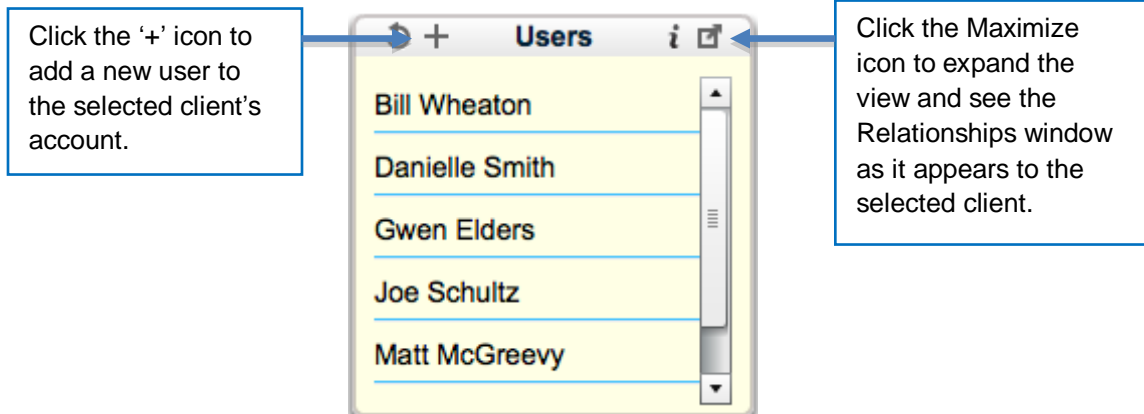


Click the Maximize icon on the Pipeline widget to view all the client's orders and work within them. *Note: Expanding the Pipeline widget will display your client's information as they see it (ie the client's main Orders dashboard). However, all work you perform within an order is tracked in the Communication Log as Customer Service to make it clear which user performed an action.*

Whenever you expand a widget that opens the client's view, you can always return to the previous screen by clicking the Close link.

## Users Widget

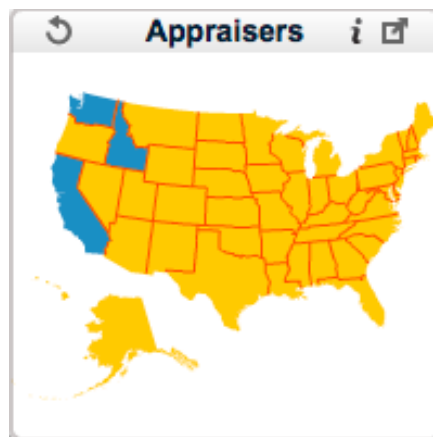
The Users tool offers easy management of your client's managed users. You can add or remove users on behalf of your client, modify their user rights, and view orders specific to individual managed users.



Click the Maximize icon on the Users widget to view all the client's users. *Note: Expanding the Users widget will display your client's information as they see it (ie the client's main Relationships window).*

## Appraisers Widget

Use the Appraiser's widget to view and modify the selected client's appraiser panel. You can add and remove appraisers to a company's panel and modify their areas of coverage.

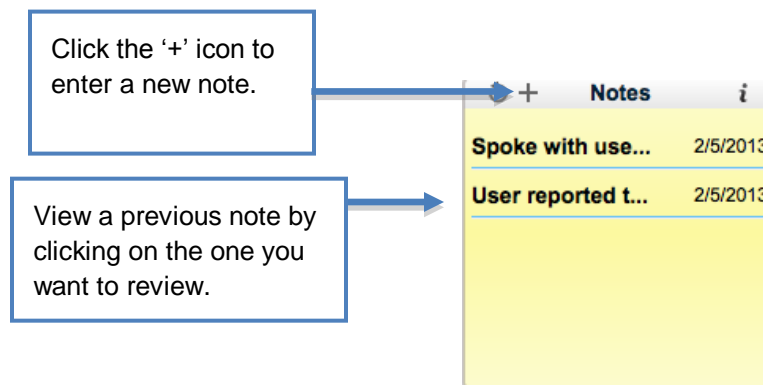


Click the Maximize icon on the Appraisers widget to view and modify a client's appraiser panel. *Note: Expanding the Appraiser widget will display your client's information as they see it (ie the client's main My Appraisers tab).*

For more information on how your clients create and manage an appraiser panel, click [here](#).

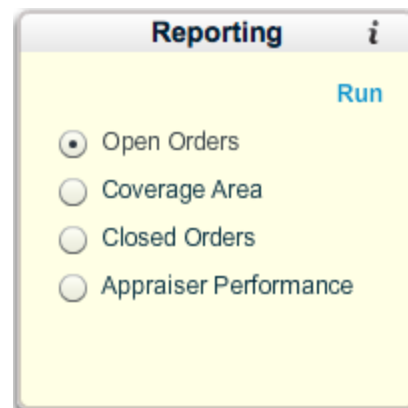
## Notes Widget

Using the Notes widget lets you track any important information associated with the selected client's account. Only you as the Manager can create and view these notes.



## Reporting Widget

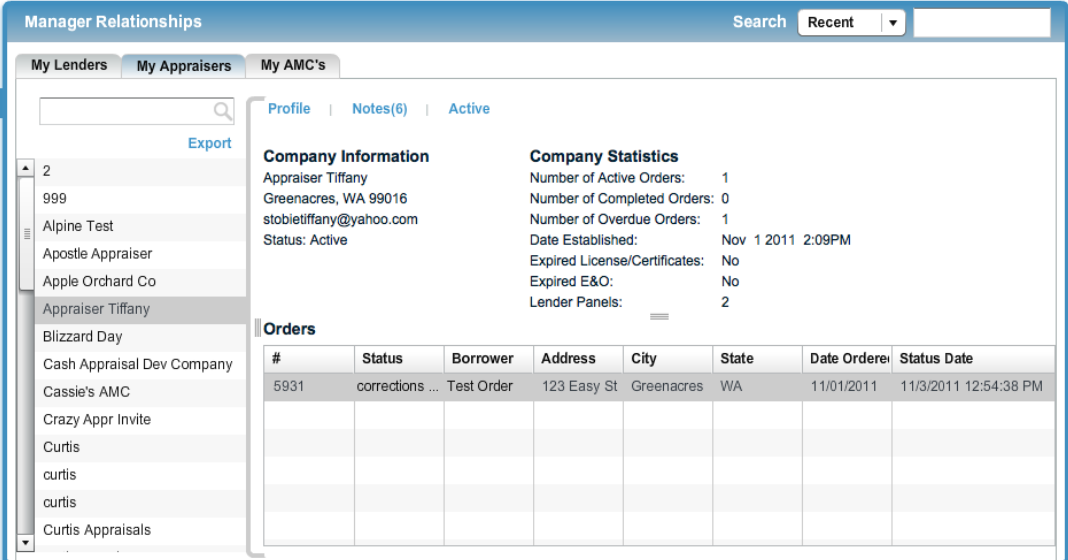
Run reports for a selected client using the Reporting widget. Select a report and click run to see the report as it applies to the specified company. *Note: For reports on all orders under your manager account, use the Reporting window along the left hand side of your account.*



## My Appraisers Tab

**My Appraisers** lets you view current appraisers that are on your clients' panels or who have signed up with your private label link. You can also view an 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.



The screenshot shows the 'Manager Relationships' interface with the 'My Appraisers' tab selected. On the left, there is a sidebar with navigation options: Orders, Relationships, Unread Messages, Message Monitor, Archives, and Reporting. The main content area is divided into three sections: 'My Lenders', 'My Appraisers', and 'My AMC's'. The 'My Appraisers' section contains a search field, an 'Export' link, and a list of appraisers. The 'Appraiser Tiffany' entry is selected and highlighted. To the right of the list, there are three tabs: 'Profile', 'Notes(6)', and 'Active'. The 'Profile' tab is active, displaying 'Company Information' and 'Company Statistics'. Below this, there is an 'Orders' section with a table of orders.

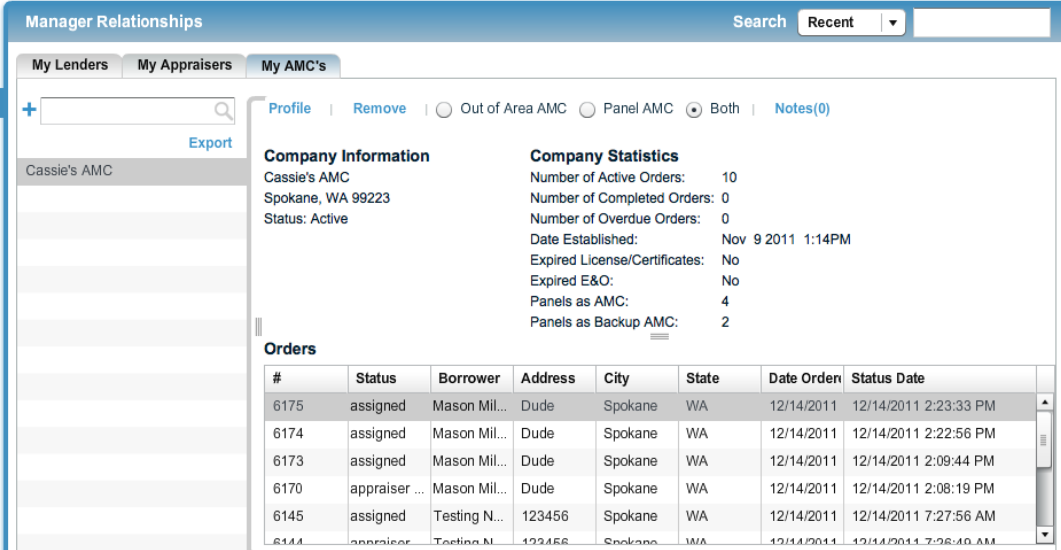
#	Status	Borrower	Address	City	State	Date Ordered	Status Date
5931	corrections ...	Test Order	123 Easy St	Greenacres	WA	11/01/2011	11/3/2011 12:54:38 PM

- **Search field** – Search through your list of appraisers by entering appraisal company name.
- **Export** - This link will generate a spreadsheet of your list of appraisers. The spreadsheet includes the email address and contact name at the appraisal company.
- **Profile** - View the selected appraiser's basic company information such as contact name, company address, and phone number.
- **Notes** - Create notes about working with this client to better manage your relationship. These notes are only available for your viewing. The number next to Notes indicates the amount of entries that have already been created.
- **Active/OnHold** – Switch the appraiser from an Active status to On Hold. On Hold appraisers cannot receive orders from lenders, and cannot log in. Switching an appraiser to an On Hold status is automatically logged in the Notes section. *Note: Because setting an appraiser to OnHold prevents them from logging in, please use discretion when applying this status to appraisers who have active orders within their account.*

- **Company Information/Order Statistics** – View basic company contact information, as well as a brief overview of the appraisal company’s work history – including the number of open orders, closed orders, overdue orders, and how many lenders they are associated with.

## My AMCs Tab

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.



**Manager Relationships** Search Recent

My Lenders My Appraisers My AMCs

Profile Remove Out of Area AMC Panel AMC Both Notes(0)

**Company Information**

Cassie's AMC  
Spokane, WA 99223  
Status: Active

**Company Statistics**

Number of Active Orders: 10  
Number of Completed Orders: 0  
Number of Overdue Orders: 0  
Date Established: Nov 9 2011 1:14PM  
Expired License/Certificates: No  
Expired E&O: No  
Panels as AMC: 4  
Panels as Backup AMC: 2

**Orders**

#	Status	Borrower	Address	City	State	Date Order	Status Date
6175	assigned	Mason Mil...	Dude	Spokane	WA	12/14/2011	12/14/2011 2:23:33 PM
6174	assigned	Mason Mil...	Dude	Spokane	WA	12/14/2011	12/14/2011 2:22:56 PM
6173	assigned	Mason Mil...	Dude	Spokane	WA	12/14/2011	12/14/2011 2:09:44 PM
6170	appraiser ...	Mason Mil...	Dude	Spokane	WA	12/14/2011	12/14/2011 2:08:19 PM
6145	assigned	Testing N...	123456	Spokane	WA	12/14/2011	12/14/2011 7:27:56 AM

- **Search field** – Search through your list of appraisers by entering appraisal company name. Click the + sign to add a new AMC. *Note - for Out of Area AMCs, you need to already have an Out of Area AMC setup in Appraisal Firewall. See below for doing this. Then, you can add an Out of Area AMC to be included in your appraisal routing.*
- **Export** - This link will generate a spreadsheet of your list of appraisers. The spreadsheet includes the email address and contact name at the appraisal company.
- **Profile** - View the selected appraiser’s basic company information such as contact name, company address, and phone number.
- **Remove** – Delete the AMC from your AMC panel list.



- **Notes** - Create notes about working with this AMC to better manage your relationship. These notes are only available for your viewing. The number next to Notes indicates the amount of entries that have already been created.

### **Setting up Out of Area and Secondary Market Solutions for Your Clients**

To use My AMCs you must first create an AMC appraiser account on Appraisal Firewall. Go to <http://www.AppraisalFirewall.com/Appraiser.asp> and click 'I'm new – sign me up' to create an account. Make sure to enter a company email address that can receive notifications whenever an order is placed to the AMC. Fill out the AMCs profile information on the first page and click Next. On the second page, mark the National AMC checkbox. Click Done to save the new AMC account.

Once an AMC account has been created, you can add the AMC to your my AMC's panel. Click the '+' icon under the My AMCs tab, enter the email address and click **Add**. When successful, the AMC will appear on the AMC list. Once you select the AMC, you can make the company available to your lender Rotation Managers (RMs) as AMC options within the RM's My Appraisers and Panel Builder windows.

You can view the profile or remove it from the list by clicking on the appropriate link. There are two main designations for an AMC: Out of Area or AMC Panel. Designate how you would like the AMC to be used by selecting the appropriate radio button. Click Both to make the AMC available for out of area orders and for use as part of an AMC Panel.

- **Out of Area AMC**
  - When a lender elects to use an Out of Area AMC, orders will automatically be assigned to that AMC when they cannot be routed to an appraiser on the lender's appraiser panel due to location or qualifications. Your lender Rotation Manager can only select one Out of Area AMC.
  - If the rotation manager does not enter an Out of Area AMC, they may still manually assign orders to the Out of Area AMC using the Assign Appraiser feature after an order has been placed.
- **AMC Panel**
  - Some lenders require that specific AMC's be used for secondary marketing investor requirement. The AMC Panel option lets lenders create their own panel of AMCs that managed users can choose from when placing an order.

- Rotation Managers can add to their AMC Panel by clicking Add to My AMC Panel under their Panel Builder tab.
- **Both**
  - Select this option to include the company as an out of area AMC as well as an available option to allow the lender to choose the AMC and bypass your lender's appraiser panel.

Once an AMC Panel has been created, users who place orders under this Rotation Manager will be able to designate which AMC the order should be assigned to when placing a new order.

If you do not want your clients creating an AMC panel, mark all your AMCs as Out of Area. The lender will not be able to choose an AMC on the new order screen if only Out of Area AMCs are selected.