

AMS – (ASSIGNMENT MANAGEMENT SYSTEM) PRODUCT GUIDE

Craig Blevins - Appraiser Tuesday - May 31, 2005

Home Page (Refresh)

New Orders and Users

Open Order Management

Order Archive

Invoices

Contact Manager

Key Management

Fee Management

Service Areas

My File

Utilities and Tools

Help and Setup

Print Main Frame

Log Out

Home Page

Craig Blevins - Appraiser
415 G Street
Modesto, CA 95350

PH: 209-522-9982
Fax: 209-522-9985

Login News:
05/22/05- The system is now open for Full Beta Test. Please email support at support@appraise.com to report problems or typos. Thank you.

Uploaded for Review: 0

M	A/I	C	Description
1	0	0	New Orders
1	2	0	In Process
0	0	0	In Process w/Terms
0	0	0	Conditioned Orders
0	0	0	Orders On-Hold
0	0	0	Declined
2	2	0	Total Open Orders
1	0	0	Untouched Orders

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REGISTRATION

There are 2 ways to register. As an original user or as an additional user associated with a registered of the AMS.

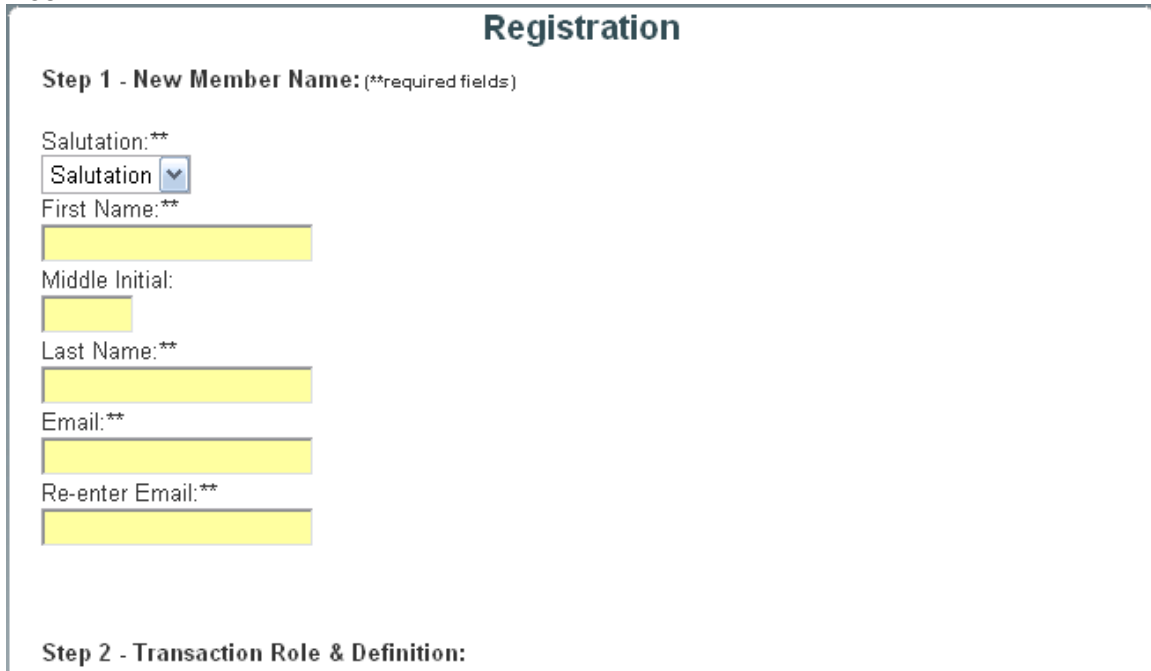
1.) As Original User

The first step is to register as a new user using the full registration page at:

<http://www.appraise.com/registration.aspx>

All original users from a company must use this registration form.

FIGURE 2.1



The screenshot shows a web form titled "Registration". Under the heading "Step 1 - New Member Name: (**required fields)", there are several input fields: a dropdown menu for "Salutation:" with "Salutation" selected, a text box for "First Name:**", a text box for "Middle Initial:", a text box for "Last Name:**", a text box for "Email:**", and a text box for "Re-enter Email:**". Below these fields, the heading "Step 2 - Transaction Role & Definition:" is visible.

2.) As Additional User for A Company that is Already Registered

Registered users of the system can add company associates that will share data views by using the Menu Wizard to add users under the 'Utilities and Tools' heading.

Figure 2.2



Note: Users can be Consumers or Producers. Producers complete assignments and prepare reports. Consumers utilize the supplied reports.

LOGGING IN

Logging into the AMS requires registration and an 'Active' account. The free trial period is 30 days from the original registration date.

Figure 3.1

The screenshot shows a 'Login Portal' with the following elements:

- Title:** Login Portal
- Text:** Please Login. If you are not a user, please [click here](#) to register for access.
- Form Fields:**
 - Email Address:** A text input field containing 'username@domain.com'.
 - Password:** A password input field with masked characters '.....'.
- Links:** 'Email to Me' and 'Password Hint' (both in blue).
- Checkboxes:** A checked checkbox labeled 'Remember me'.
- Buttons:** 'Login' and 'Reset' buttons.

Note: There is no charge for:

- *Registration and use of the AMS for 30 days.*
- *Appraiser and inspector listings in the on-line Appraiser-Inspector Locator database available to the public and all clients.*
- *Use of E-mail Work Spaces.*

****Remember to log out when session in the AMS is complete. Multiple logins are not allowed. ****

HOME PAGE WORK-SPACE

Figure 3.2

The screenshot shows a 'Home Page' workspace with a navigation menu on the left and a main work space on the right.

Navigation Menu (Left):

- Home Page (Refresh)
- New Orders and Users
- Open Order Management
- Order Archive
- Invoices
- Contact Manager
- Key Management
- Fee Management
- Service Areas
- My File
- Utilities and Tools
- Help and Setup
- Print Main Frame
- Log Out

Main Work Space (Right):

Home Page

Craig Blevins - Appraiser
415 G Street
Modesto, CA 95350

PH: 209-522-9982
Fax: 209-522-9985

Login News:

05/22/05-The system is now open for Full Beta Test. Please email support at support@appraise.com to report problems or typos. Thank you.

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0	0	0	Declined
1	1	0	Total Open Orders
1	1	0	Untouched Orders

The home page for each user consists of the drop-down menu (on left) and main work space (on right). Clicking on the menu headers expands each section to reveal links that when clicked will cause the link page to open in the main work space. The home page opens and refreshes to the dash board where company and user open assignment statistics are detailed and tallied.

THE DASH BOARD DETAIL

Figure 4.1

M	A/I	C	Description	Uploaded for Review: 0
1	0	0	New Orders	
0	1	0	In Process	
0	0	0	In Process w/Terms	
0	0	0	Conditioned Orders	
0	0	0	Orders On-Hold	
0	0	0	Declined	
1	1	0	Total Open Orders	
1	1	0	Untouched Orders	

The dash board details open assignments and their respective status. Being a role-based system, stats are broken down as follows:

M - Companies or individuals where the user's role is as the Management Company (Consumer)

A/I - Orders assigned to the logged in user as appraiser or inspector (Producer)

C – Orders as the logged in client (Consumer)

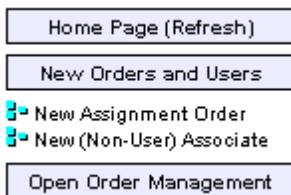
A company that only places orders as the management company would only have stats in the first column. The system is capable of tracking thousands of transactions per day.

Example: An appraiser enters all of the orders he receives into the AMS. He/she will complete some of the assignments; some are assigned to associated appraisers. An appraiser who tracks orders for their own assignments as well as for associated appraisers, would see stats in two of the above columns: the total number of orders they have entered into the AMS in the 'M' column and the assignments that they themselves are completing in the 'A/I' column.

NEW ORDERS

New orders start by using the New Assignment Order link off of the main menu.

Figure 4.2



STEP 1

Clicking on the link will initiate the New Associate Order Wizard. The Zip Code of the property to be appraised or inspected is entered into the text box and the 'Continue Button' is pushed.

Figure 5.1

New Associate Order - Step 1 of 4

Enter Zip Code: Need a Zip Code? [Click here.](#)

94010

Continue

STEP 2

The communities that are included in the supplied Zip Code are populated to a pull-down box.

Figure 5.2

New Associate Order - Step 2 of 4

Choose City: Zip code entered: 94010

Select City

Select City

Burlingame

Hillsborough

Continue

Select city from drop-down box and click 'Continue'.

If your city is not in the selection, start again by clicking on 'New Associate Order' from the Menu and check the zip code utilized in the query.

Select the city the Subject is located in and click 'Continue'. The server has noted the state and county the city is located in for future queries.

STEP 3

The next page requests the first few letters of the client company that is requesting the assignment be completed. This is required to limit the number of results returned in the event that you have thousands of records in the AMS.

This can be your own company if the AMS is utilized to track assignments that you place.

Tab out of the box to begin the query.

Figure 5.3

New Associate Order - Step 3 of 4

Enter Alphabetic Constraint for Client:
(First letter(s) of the Company name.)

acc

Narrow Query:

Hint: Please enter the first letter letters of the client's company name to narrow the returned results. Use the Tab key to exit the field to begin the query.

The page will post-back with results from the letters entered into the text box. The results populate a pull down box. Select the company that you wish to place the order for. If the company is not included in the pull down box, check the letters you used to initiate the query and try again. If they are again not included in the results, they may be a new client and they can be

added at this time by clicking on the provided link. ([Click Here to Add New Client](#)) Refer to Figure 6.1. The Add New Client form is launched in a new window. Once the client is added, the page can be refreshed by re-entering the first few letters of the company. DO NOT USE THE BROWSER REFRESH.

STEP 3 Continued.

Figure 6.1

New Associate Order - Step 3 of 4

Enter Alphabetic Constraint for Client:
(First letter(s) of the Company name.)

acc

Select Company

Select Client Company ▼

Select Client Company
Accolade Network, Inc.

rop-down list to continue. The select company (consumer of the ordered report, must be a 'Keyed Associate' of your company to be included in the results. If the company you wish to place this order for is not listed in the results, you can ([Click Here to Add New Client](#)) A new window will appear. Once the new client is added, close the new window and refresh this page to see the new company in the results.

Selecting the client will result in another auto-post back and the new box displayed is populated by the Appraisers and Inspectors that offer services in the county where the Subject is located.

If the Appraiser or Inspector that you wish to assign this report to is not included in the list, you can add them to the AMS by clicking on the supplied link.

Figure 6.2

New Associate Order - Step 3 of 4

Enter Alphabetic Constraint for Client:
(First letter(s) of the Company name.)

acc

Select Company

Accolade Network, Inc. ▼

Select Appraiser/Inspector

Select Appraiser/Inspector ▼

Select Appraiser/Inspector
Do Not Assign
Accolade Network Inc.
Craig Blevins - Appraiser

Hint: Select the appraiser or inspector that you wish to complete this assignment. The results are based on providers in **San Mateo County, CA.**

If no results were returned, you can:

- 1.) Elect to assign yourself the assignment and continue. You can reassign the order later when a provider is located.
- 2.) If the company you wish to place this order for is not listed in the results, you can ([Click Here to Add New Appraiser-Inspector](#)) A new window will appear. Once the new Appraiser or Inspector is added, close the new window and refresh this page to see the new Appraiser or Inspector in the results.

STEP 3 Continued

Note that you can add your own company as a producer. This allows you to assign reports temporarily to your own company so that you can start to track the job until an appraiser or inspector is located. The assignment can be reassigned at a later time when the appraiser is located.

Once the Producer (appraiser or inspector) is selected from the drop down box, the form auto-posts back to populate another pull down box with the reports and fees that the appraiser or inspector provides.

Figure 7.1

New Associate Order - Step 3 of 4

Enter Alphabetic Constraint for Client:
(First letter(s) of the Company name.)
acc

Select Company
Accolade Network, Inc. ▼

Select Appraiser/Inspector
Craig Blevins - Appraiser ▼

Select Required Report:
Select Report and Fee ▼

- Select Report and Fee
- Unknown/Other
- 1004 / Full - URAR Uniform Residential Appraisal Report - \$375
- 1004 / FHA - URAR FHA Uniform Residential Appraisal Report - \$450
- 1007 - Single Family Comparable Rent Schedule - \$75
- 216 - Operating Income Statement - \$75
- 442 - Satisfactory Completion Certificate - \$100
- 1025 2-4 Unit - Small Residential Income Property Appraisal Report - \$700
- 1073 - Individual Condominium Unit Appraisal Report - \$400
- 2000 - One-Unit Residential Appraisal Field Review Report - \$225
- 2000A - Two-to-Four-Unit Residential Appraisal Field Review Report - \$250
- 2002 - Residential (Desk Top) Appraisal Review Form - \$150
- 2-4 Desk Review - Multy Family Appraisal Desk Review - \$175
- 2055 Interior - Desktop Underwriter Quantitative Analysis Appraisal Report - \$350
- 2055 Exterior - Desktop Underwriter Quantitative Analysis Appraisal Report - \$300
- 2065 Interior - Desktop Underwriter Quantitative Analysis Appraisal Report - \$350
- 2065 Exterior - Desktop Underwriter Quantitative Analysis Appraisal Report - \$300

are based on the returned continue. You

Selecting the desired report will complete Step 3.

STEP 4 – Completing the Request

Step 4 is the final step in the assignment or New Associate Order wizard. The wizard requires

- Subject address
- Purpose of the report
- Occupancy
- Property type
- Loan type
- Borrower or Contact names
- Due date
- Payment type

The answers to some of the required data will result in the form posting back to reveal other required fields.

Example: If Purpose of the Report is for a Sale, the form will post back and reveal a text box that allows you to enter the sales price.

The remainder of the fields are not required, but completing as many as possible will be of help to the appraiser or inspector.

Figure 8.1

New Associated Order - Step 4 of 4

Complete Order for ATN: 25097

Client:	Appraiser/Inspector:
Accolade Network, Inc. 415 G Street Modesto, CA 95351 PH: 209-522-9981 Fax: 209-522-9985	Craig Blevins - Appraiser 415 G Street Modesto, CA 95350 PH: 209-522-9982 Fax: 209-522-9985

Subject Location:

Burlingame, CA 94010
San Mateo County

Report and Fee:
1004 / Full
URAR Uniform Residential Appraisal Report
\$375.00

Step 1 - Address and Report Information: (required)**

Property Street Address**

Purpose of Report**

Purpose

Occupancy**

Occupancy

Property Type**

Property Type

Type of Loan**

Type of Loan

Completing the form will take you to the Invoice Creation form where you can complete the invoice.

INVOICE CREATION

The invoice record has been created in the database, but it has not been automatically populated allowing consideration for mark-up and fee splitting.

Figure 9.1

Update Invoice		Invoice Number: 25097
Client:	Appraiser/Inspector:	
Accolade Network, Inc. 415 G Street Modesto, CA 95351 PH: 209-522-9981 Fax: 209-522-9985	Craig Blevins - Appraiser 415 G Street Modesto, CA 95350 PH: 209-522-9982 Fax: 209-522-9985	
BORROWER:	PUBLISHED CONTRACTOR FEE:	
Mr. Smith 123 Burlingame Avenue Burlingame, CA 94010	1004 / Full - URAR Uniform Residential Appraisal Report - \$375.00	
CURRENT INVOICE DATA:		
URAR Uniform Residential Appraisal Report - 375.00		
-		
-		
-		
Report Description		Fee
URAR Uniform Residential Appraisal Report		375
		0
		0
		0
Invoice Terms and Comments: (512 char-max)	Sub Total:	375
Due upon inspection <input type="button" value="↑"/> <input type="button" value="↓"/>	Sales Tax Rate:	0
	Sales Tax:	0
Fee to Appraiser/Inspector. This amount is published as the Fee paid to the Appraiser/Inspector on the Report Authorization Form:	Total:	375
<input type="text" value="375"/>	<input type="button" value="Enter Invoice"/>	

The form must be manually completed, but the current invoice data is supplied and for convenience may be clipped and pasted into the invoice.

The fee paid to the appraiser or inspector may be different from the final invoice total and input into the box in the lower left side of the form (refer to figure 9.1).

Upon completion and submission of the Invoice, the authorization to perform the assignment noted as the 'Appraisal-Inspection Request' is displayed.

Craig Blevins - Appraiser		ATN - 25097
Licensed Real Estate Appraiser Serving California's Central Valley		
Appraisal-Inspection Request		
Authorized/Ordered By:		Assignment:
Craig Blevins - Appraiser 415 G Street Modesto, CA 95350 PH: 209-522-9982 Fax: 209-522-9985 Email: cblevins@appraise.com		Status: New Order Date: 05/31/05 Due Date: 06/10/05 Inspection Date:
Client:		Appraiser/Inspector:
Accolade Network, Inc. 415 G Street Modesto, CA 95351 Ph: 209-522-9981 Fax: 209-522-9985 Email: support@appraise.com		Craig Blevins - Appraiser 415 G Street Modesto, CA 95350 PH: 209-522-9982 Fax: 209-522-9985 Email: cblevins@appraise.com
Subject Property:		Report and Fee:
Mr. Smith 123 Burlingame Avenue Burlingame, CA 94010 San Mateo County H: 555-123-1234 W: 555-321-4321 C: Email:		Form: 1004 / Full Desc: URAR Uniform Residential Appraisal Report Rent Survey: Op-Income: Fee: \$375.00 Payment: Collect From Borrower at Time
Co-Borrower:		Contact:
Mrs. Smith H: 555-123-1234 W: 555-123-6789 C: Email:		H: W: C: Email:
Report Detail:		Transaction Detail:
Type of Property: SFR Occupancy: Primary Residence Type of Loan: Conventional Case Number: MERS Number: Loan Number: File Number:		Sales Price: \$0.00 Estimated Value: \$1,495,000.00 Loan Amount: \$100,000.00 NOTES:

OPEN ORDER MANAGEMENT

The Open Order Management menu allows users to track and interact with orders based on their role within the transaction.

Management Companies will see all of their open order by clicking on the 'As Management Company' link.

Figure 11.1



Users noted to be the client or appraisers / inspectors can manage and interact with their open orders by clicking on the appropriate link.

Figure 11.2

ATN	Client	Appraiser Inspector	Address	Dates	Status	Touch Status
25097 Cash-Out Refinance 1004 / Full URAR Uniform Residential Appraisal Report \$375.00 Collect From Borrower at Time	Accolade Network, Inc.	Craig Blevins - Appraiser	Mr. Smith 123 Burlingame Avenue Burlingame, California 94010 San Mateo	Order: 5/31/05 Due: 6/10/05 Inspection Date:	New	
25087 Sale 1004 / Full URAR Uniform Residential Appraisal Report \$375.00 Bill Client	Accolade Network, Inc.	Certified Appraisers	415 Test Street Modesto, California 95350 Stanislaus	Order: 5/25/05 Due: 6/9/06 Inspection Date:	New	

Assignment data is displayed with the default view of 25 records per page. This can be increased to a maximum of 99 records per page. The search box allows for fast retrieval of individual records if the ATN (order id), address or borrower name is known. The pull-down boxes at the top allow all of the records for one client or one appraiser to be displayed. The final pull-down box displays the assignments based on their status. This is an easy way to locate all of the late or conditioned assignments.

Clicking on one of the three icons to the left of each record will bring up an edit page, the assignment detail work space or the file history comments page. The most often utilized link will be the center icon of the magnifying glass that will open the assignment detail work space.

ASSIGNMENT DETAIL WORKSPACE

The assignment detail workspace is broken down into 4 sections. The top section is the pull-down menu specific to the assignment with Print, Refresh and Close Window icons.

Figure 12.1



Each menu leads to a wizard or form that facilitates interaction with the assignment.

Figure 12.2

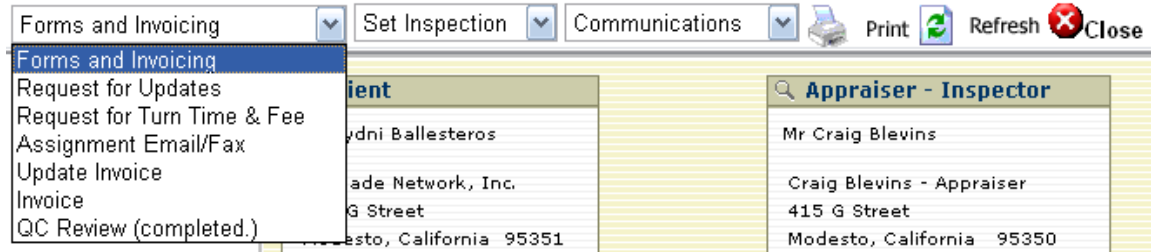


Figure 12.3

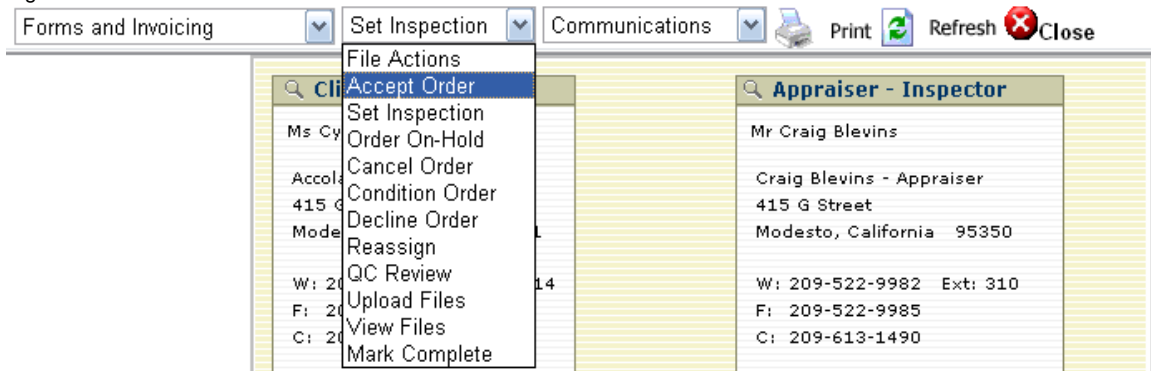
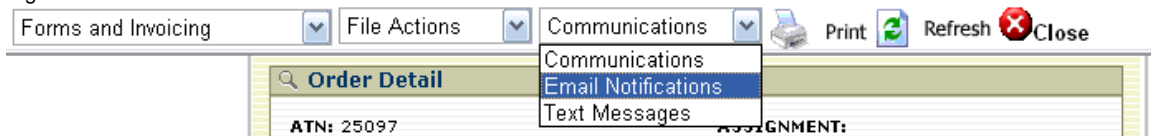


Figure 12.4



The pull-down boxes lead to applets and wizards that help in the assignment management tasks.

As an example, if the Accept Order item is selected, a page is displayed that allows the user to accept the assignment and enter comments to the Order History.

The top section of the detail displays Consumer and Producer details. The center of the workspace displays the assignment details (figure 13.1) and the last section displays the File History Comments (figure 13.2). Any link can be followed and either utilized or abandoned by clicking on the Refresh icon at the top of the page.

Figure 13.1

🔍 **Order Detail**

<p>ATN: 25097</p> <p>SUBJECT ADDRESS: 123 Burlingame Avenue Burlingame, California 94010 County: San Mateo X-Street:</p> <p>BORROWER: Mr. Smith H: 555-123-1234 W: 555-321-4321 E:</p> <p>CO-BORROWER: Mrs. Smith H: 555-123-1234 W: 555-123-6789 E:</p> <p>CONTACT FOR ENTRY: <i>(If different from Borrowers)</i> H: W: E:</p> <p>SUBJECT DATA: Type: SFR Occupancy: Primary Residence Sales Price: \$0.00 Estimated Value: \$1,495,000.00 Loan Amount: \$100,000.00 LTV:</p> <p>COMMENTS:</p>	<p>ASSIGNMENT: Status: In Process Touched: cblevins@appraise.com Processor: cblevins@appraise.com Lender:</p> <p>REPORT: 1004 / Full URAR Uniform Residential Appraisal Report Purpose: Cash-Out Refinance Fee to A/I: \$375.00 Client Fee: Launch Invoice Payment: Collect From Borrower at Time</p> <p>DATES: Order: 5/31/2005 Due: 6/10/2005 Inspection: 6/3/2005 3:30 PM Completion:</p> <p>FILE NUMBERS: File: Loan: Case: MERS: Other:</p>
---	---

Figure 13.2

🔍 **Order History**

[Add New Comment](#)

<<
<
Page 1 of 1
>
>>
Page Size

Go

Date	Comment Author	Comment
5/31/2005	cblevins@appraise.com	Inspection time set.
5/31/2005	cblevins@appraise.com	Assignment fee and due date accepted.

E-MAIL WORK SPACES

AMS users who enter orders (role: Management Company), have the ability to issue E-mail Work Spaces.

Once an order is entered into the AMS, navigating to the Assignment Detail Page and using the Communications pull down box menu and selecting 'Email Notifications' (figure 12.4), e-mail notifications of the assignment can be sent to the appropriate parties by clicking on the links.

Email Wizard

SUBJECT PROPERTY:

Mr. Smith
123 Burlingame Avenue
Burlingame, CA 94010

1004 / Full - URAR Uniform Residential Appraisal Report

Workspace Links by Email Wizard

The following links send email messages to the respective parties of this transaction that allows both registered and non-registered users access to the tracking system to interact with you by reading and adding file comments to the assignment.

No login is required. The link will be active for the life of the file. When the assignment is completed, the Workspace Link will direct the user to the default login screen. Registered users can login and review all prior assignments and manage other files.

Click on the link to send email messages.

APPRAISER - INSPECTOR (Producer)
Craig Blevins - Appraiser

 [Send Appraiser-Inspector On-line Work File Page to: Craig Blevins - Appraiser](#)

CLIENT (Consumer)
Accolade Network, Inc.

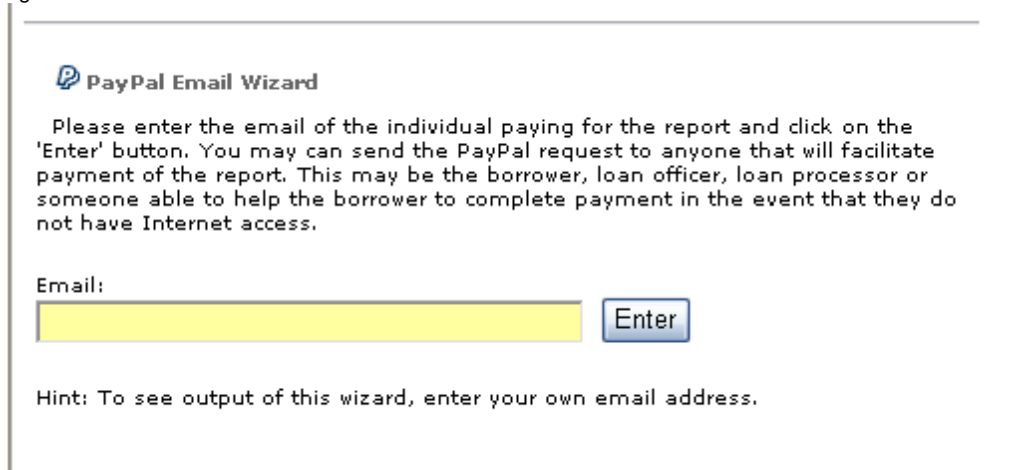
 [Send Client On-line Work File Page to: Accolade Network, Inc.](#)

By e-mailing workspace links to the parties involved in the transaction, you have confirmed that the assignment is placed and all parties can interact with the file.

NOTE: Appraiser – Inspector and Client E-mail Workspaces include limited menu items specific to their respective roles in the transaction. The Management Company retains full control of the file.

PayPal E-MAIL WIZARD

Figure 15.1



The screenshot shows a web form titled "PayPal Email Wizard". It contains a paragraph of instructions, a text input field labeled "Email:" with a yellow highlight, and a blue "Enter" button. Below the input field is a "Hint" section.

PayPal Email Wizard

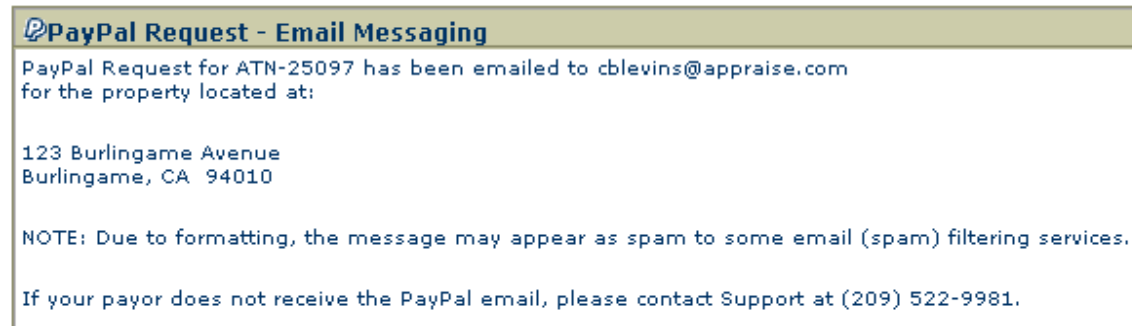
Please enter the email of the individual paying for the report and click on the 'Enter' button. You may send the PayPal request to anyone that will facilitate payment of the report. This may be the borrower, loan officer, loan processor or someone able to help the borrower to complete payment in the event that they do not have Internet access.

Email:

Hint: To see output of this wizard, enter your own email address.

The wizard sends an e-mail invitation to utilize PayPal to pay for the assignment. The recipient receives instructions and a link to the invoice page that includes the PayPal Pay Now Button. (Figure 16.1)

Figure 15.2



The screenshot shows an email message with a header "PayPal Request - Email Messaging". The body text provides details about a PayPal request for a specific property, including the recipient's email address and the property address. It also includes a note about spam filtering and contact information for support.

PayPal Request - Email Messaging

PayPal Request for ATN-25097 has been emailed to cblevins@appraise.com for the property located at:

123 Burlingame Avenue
Burlingame, CA 94010

NOTE: Due to formatting, the message may appear as spam to some email (spam) filtering services.

If your payor does not receive the PayPal email, please contact Support at (209) 522-9981.

All that is required is a business PayPal account e-mail address and a completed order and invoice in the AMS. To establish a business PayPal account visit <http://www.paypal.com>

Once established, enter the PayPal e-mail account into your file in the AMS. The PayPal e-mail account can be different from your personal and company e-mail addresses.

