

Appraisal Firewall Quick Start Guide

Information for Managers

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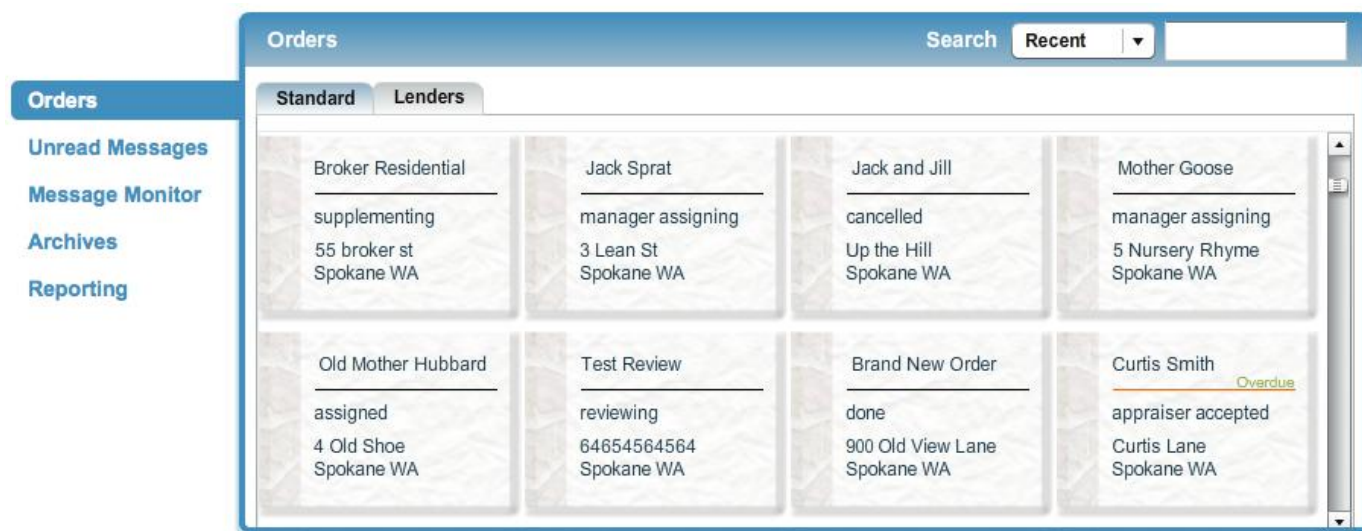
Basic Usage and Layout

Use the action menus along the top to perform specific actions in Appraisal Firewall: view **My Profile**, **My Appraisers**, **My AMC**, **Organize**, and **Signups**. Your logged-in information is at the top right, along with a **Logout** link.



Along the left, you can check your orders with Order List, view Unread Messages, monitor lender/appraiser communications on the Message Monitor, restore Archives, and view Reporting.

The Order List section contains all of your appraisal orders. Click on an Order Card to open it and review order information.



The screenshot shows the 'Orders' section of the Appraisal Firewall interface. On the left is a sidebar with navigation links: **Orders**, [Unread Messages](#), [Message Monitor](#), [Archives](#), and [Reporting](#). The main content area is titled 'Orders' and has a search bar with a dropdown menu set to 'Recent'. Below the search bar are two tabs: 'Standard' (selected) and 'Lenders'. The orders are displayed in a grid of cards. Each card shows the order type, status, and address. The 'Curtis Smith' card has a red 'Overdue' label.

Order Type	Status	Address
Broker Residential	supplementing	55 broker st Spokane WA
Jack Sprat	manager assigning	3 Lean St Spokane WA
Jack and Jill	cancelled	Up the Hill Spokane WA
Mother Goose	manager assigning	5 Nursery Rhyme Spokane WA
Old Mother Hubbard	assigned	4 Old Shoe Spokane WA
Test Review	reviewing	64654564564 Spokane WA
Brand New Order	done	900 Old View Lane Spokane WA
Curtis Smith	appraiser accepted	Curtis Lane Spokane WA

My Profile

With **My Profile**, you can view and edit your company information, including contact numbers, login information, and address. You can also modify your fees, add credit card processing information, and add your private label website address. For more information on setting transaction fees on a per-client basis see the Organize section.

My Profile - AF Beta
Cancel
Done

Your Management Profile

Fees (default)	\$	%	Transaction	Billing	Fees Paid By
Residential	<input type="radio"/>	<input checked="" type="radio"/>	20	3	<input checked="" type="radio"/> Appraiser
Commercial	<input checked="" type="radio"/>	<input type="radio"/>	30	0	<input type="radio"/> Originator
Guaranteed Valuation			\$17.00	<input checked="" type="radio"/> Off <input type="radio"/> Available	
Automated Review			\$8.00	<input checked="" type="radio"/> Off <input type="radio"/> Available	
Manual Review				<input checked="" type="radio"/> Off <input type="radio"/> Available	

Credit Card Processing

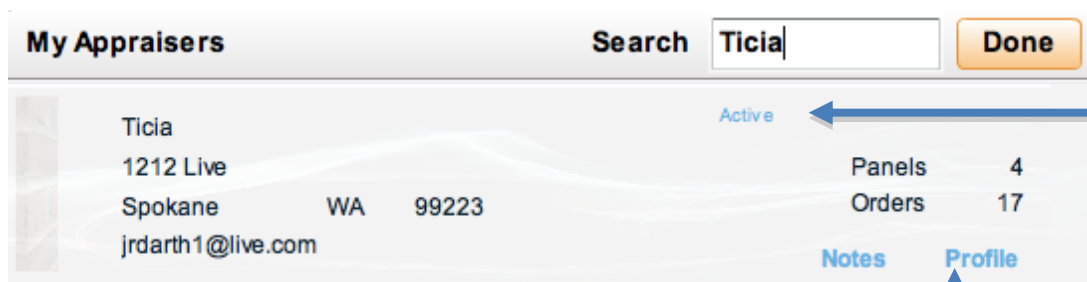
Processing Center	<input type="text" value="Authorize.Net"/>	Accept
Account Name	<input type="text" value="SharperLending Solution"/>	<input checked="" type="checkbox"/> Visa
Login ID	<input type="text" value="*****"/>	<input type="checkbox"/> MasterCard
Transaction Key	<input type="text" value="*****"/>	<input checked="" type="checkbox"/> American Express

Private Label


Originator Link	<input type="text" value="https://www.appraisalfirewall.com/originator.asp?mana"/>	<input type="button" value="Instructions"/> <input type="button" value="Test"/>
Appraiser Link	<input type="text" value="https://www.appraisalfirewall.com/appraiser.asp?mana"/>	<input type="button" value="Test"/>

My Appraisers

My Appraisers lets you view current appraisers that are on your clients' panels and enables you to put their accounts into an 'On Hold' status.



My Appraisers Search

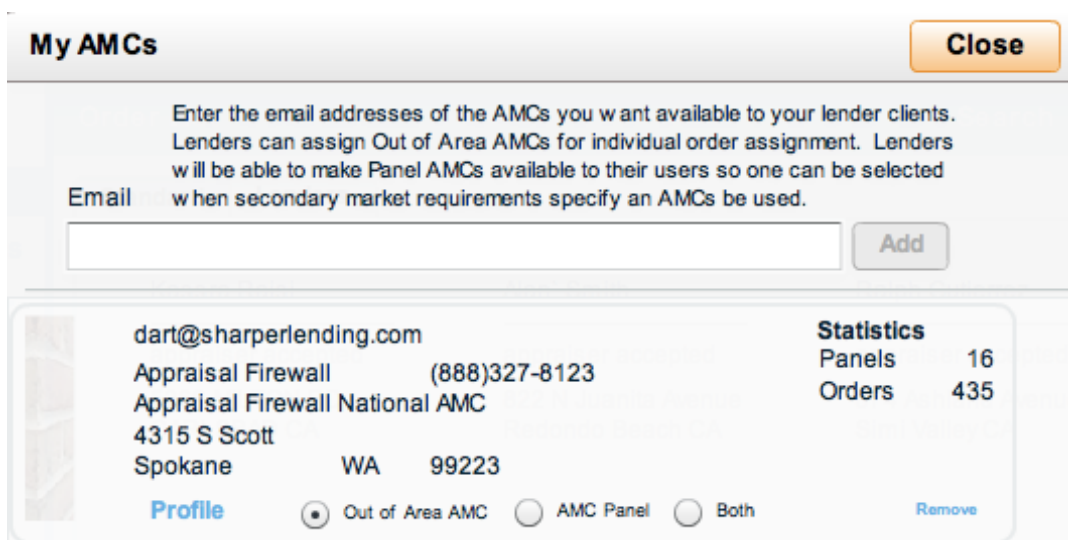
	Ticia 1212 Live Spokane WA 99223 jrdarth1@live.com	Active	Panels 4 Orders 17	Notes Profile
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Click to switch the user from an **Active** to **OnHold**.

View the number of lender panels and orders the appraiser is associated with.

My AMCs


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.



My AMCs

Enter the email addresses of the AMCs you want available to your lender clients. Lenders can assign Out of Area AMCs for individual order assignment. Lenders will be able to make Panel AMCs available to their users so one can be selected when secondary market requirements specify an AMCs be used.

Email

	dart@sharperlending.com Appraisal Firewall (888)327-8123 Appraisal Firewall National AMC 4315 S Scott Spokane WA 99223	Statistics Panels 16 Orders 435
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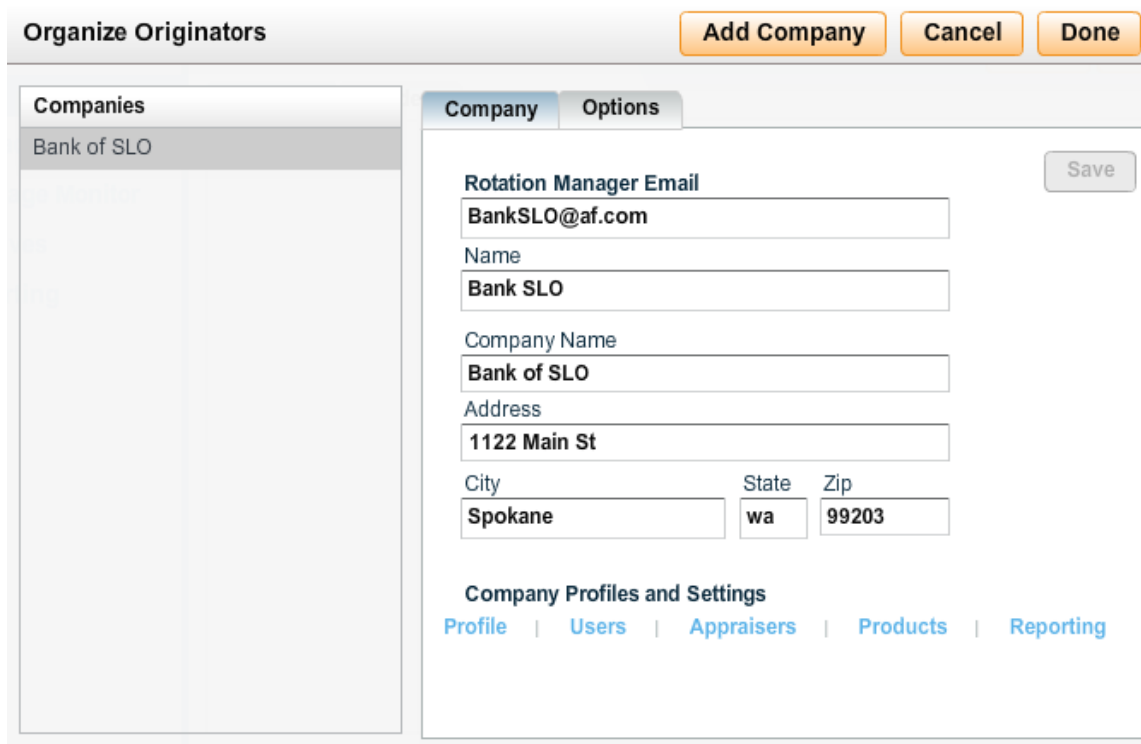
[Profile](#) Out of Area AMC AMC Panel Both

Organize

The Organize tab lets you enable settings and review company information on a per-lender basis.

Organize – Company Tab

From the Company tab, you have the ability to view users, run reports, and manage billing options on a per company basis.



The screenshot shows the 'Organize Originators' interface. At the top, there are three buttons: 'Add Company', 'Cancel', and 'Done'. Below this is a table with a 'Companies' column containing 'Bank of SLO'. To the right, the 'Company' tab is selected, showing a form for 'Bank of SLO'. The form includes fields for 'Rotation Manager Email' (BankSLO@af.com), 'Name' (Bank SLO), 'Company Name' (Bank of SLO), 'Address' (1122 Main St), 'City' (Spokane), 'State' (wa), and 'Zip' (99203). A 'Save' button is located at the top right of the form. Below the form, there is a section titled 'Company Profiles and Settings' with links for 'Profile', 'Users', 'Appraisers', 'Products', and 'Reporting'.

Selecting a link under **Company Profiles and Settings** shows you specific information applicable to that company only.

- **Profile** – Click this link to view the rotation manager's profile associated with this company
- **Users** – View and edit the list of managed users under this company
- **Appraisers** – View and edit the list of appraisers on the company's appraiser panel
- **Products** – Specify what appraisal products you would like available for this company as well as edit fixed pricing
- **Reporting** – Run Open Order, Closed Order, Coverage Area, and Appraiser Performance reports for the specified company.

Organize – Options Tab

Under the **Options** tab, you can alter a company's transaction fees, designate who pays for appraisal orders, and select more company-specific options.

Organize Originators

Companies	Company Options																																																																																																																														
<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Serenity Inc</div> <div style="padding: 2px;">Serenity Inc</div> <div style="padding: 2px;">Serenity Inc</div> <div style="padding: 2px;">Serenity Ince</div> <div style="padding: 2px;">Sesame Street, Inc</div> <div style="padding: 2px;">Sharpay's Company</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">sharperlending</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">Sharperlending</div> <div style="padding: 2px;">Sharperlending L.L.C.</div> <div style="padding: 2px;">Sharperlending L.L.C.</div> <div style="padding: 2px;">sharperlending number 2</div> </div>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">Fees</td> <td style="text-align: center;">\$</td> <td style="text-align: center;">%</td> <td style="text-align: center;">Transaction</td> <td style="text-align: center;">Billing</td> <td style="text-align: right;"><input type="button" value="Save"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> Residential</td> <td style="text-align: center;"><input checked="" type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td></td> <td style="text-align: center;">20</td> <td style="text-align: center;">5</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> Commercial</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input checked="" type="radio"/></td> <td></td> <td style="text-align: center;">3</td> <td style="text-align: center;">2</td> <td></td> </tr> <tr> <td colspan="2">Paid By</td> <td colspan="2">Review Policy</td> <td>Enabled</td> <td>Price</td> <td></td> </tr> <tr> <td colspan="2"><input checked="" type="radio"/> Appraiser</td> <td colspan="2">Automated</td> <td><input type="checkbox"/></td> <td>\$8.00</td> <td></td> </tr> <tr> <td colspan="2"><input type="radio"/> Originator</td> <td colspan="2">Manual</td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td colspan="2">Options</td> <td colspan="2"></td> <td>Price</td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Guaranteed Valuation</td> <td colspan="2"></td> <td>\$17.00</td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input checked="" type="checkbox"/> Do Not Auto Generate Appraisal Independence Certificate</td> <td colspan="2"></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Exclude from Message Monitor</td> <td colspan="2"></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input checked="" type="checkbox"/> Manager Bill Lender and Remit to Appraiser</td> <td colspan="2"></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Suppress Credit Card payment option</td> <td colspan="2"></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Allow Billing for AMC Orders</td> <td colspan="2"></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Market Area - 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- **Fees** – Enter appraisal technology fees that will be applied to every completed order under this company only. If fees are left blank, the fees will default to the pricing entered on your manager profile.
 - **Residential** – Marking this checkbox allows the client to place Residential appraisal orders. Clients also have the ability to designate they perform Residential appraisals on their profile.
 - **Commercial** – A check in this checkbox indicates that the client can place commercial orders. Clients also have the ability to designate they perform Commercial appraisals on their profile.
 - **\$ and %** - Designate how you want to bill this client for your fees per appraisal order – as a flat-rate or percentage-based fee. Click the \$ if you want to offer a standard price for every order under this client (you can then enter the dollar amount in the Transaction and Billing fee columns). Click the % if your fees are based on a percentage of the total appraisal cost (enter the percentage amount in the Transaction and Billing fee columns).
 - **Transaction fee** – This amount will be calculated on each order and displayed in the Communications log of the order, viewable to the appropriate party (ie appraisers can view the service fee amount if it is designated that the appraiser is responsible to pay the fee).

- **Billing service fee** – You may designate a fee to be applied to orders that have been placed with a credit card under this company. Adding a billing service fee can help cover the costs associated with running credit card transactions.
- **Review Policy** – check the Manual or Automated checkboxes so that every appraisal that is ordered and uploaded is reviewed for completeness. Modify the price and availability on a per lender basis. This feature is activated on your Manager profile, where a default price can also be set.
- **Guaranteed Valuation** – marking this checkbox can protect your client from losses due to an incorrect appraised value in the event the loan goes into default. Edit the price of the guarantee in the price field on a per lender basis. The guaranteed valuation will appear in the communications log after an appraisal report has been uploaded. This feature is activated on your Manager profile, where a default price can also be set.
- **Do Not Auto Generate Appraisal Independence Certificate** – by default, an Appraisal Independence Certificate is automatically generated upon the upload of an appraisal report. Click this check box if you do not want the compliance certificate generated for this company.
- **Exclude from Message Monitor** – messages under this lender are automatically displayed in your manager Message Monitor window. Checking the checkbox removes this lender's messages from the Message Monitor. This is a handy way for you to control your Message Monitor list as it can easily become cluttered. See below for more information on the Message Monitor feature.
- **Manager Bill Lender and Remit to Appraiser** – check this checkbox if this client will pay you, the Manager, the appraiser fee. You then are responsible for paying the appraiser.
- **Suppress Credit Card Payment Option** – select this option if this client should never be able to pay for an appraisal via Credit Card.
- **Allow Billing** – check this checkbox to allow billing for out of area orders rather than require payment by credit card
- **Market Area - not a Rotation Manager** – In cases where the Rotation Manager is representative of a market area and is not an actual person at the lender office, checking this checkbox prohibits users from sending the Rotation Manager messages when opening an order and choosing the **Communicate | Send Message** menu option.
- **Suppress Email** – intended to be used for those clients that order their appraisals from the SharperLending platform. This checkbox does not send status update emails to the lender, as they will not receive them in

SharperLending.

- **Carbon copy Rotation Manger on all Emails** – check this checkbox so that the Rotation Manager is copied on all messages between users and appraisers. Rotation Managers can use this feature to monitor communications for inappropriate or non-compliant messages.
- **Notify Rotation Manager on Declines** – mark this checkbox if the rotation manager would like to be notified anytime an appraiser declines an order.
- **Client ID** – Enter a client ID code to help track and manage different companys' activities. This is designed to assist resellers that utilize the XpertOnline credit platform and to line appraisal orders by client ID numbers that are assigned in XpertOnline.

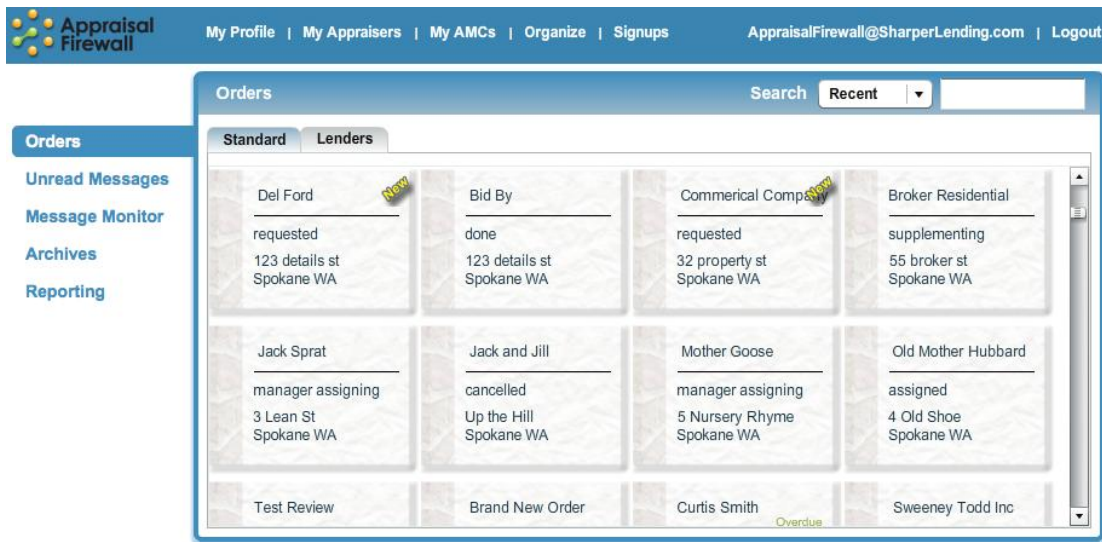
Signups

With **Signups**, you are able to monitor new users who have signed up under your private label link. Viewing new signups helps in tracking responses to marketing.

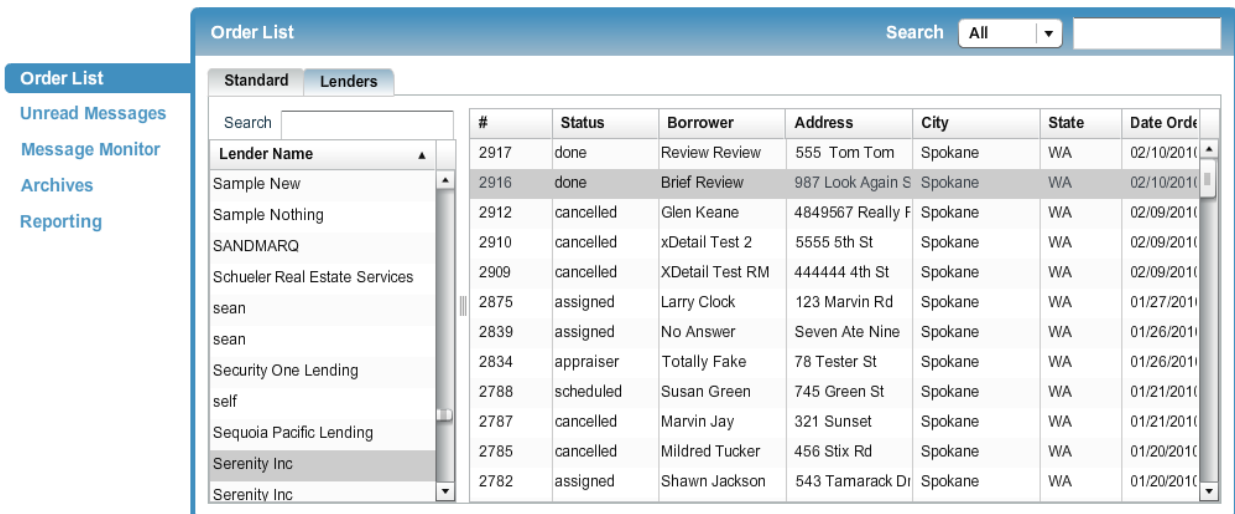
Order List

The Standard tab is your main view into all orders that have been placed by your clients in Appraisal Firewall. Use the Search filter to narrow down the list to display **Active** orders, **Overdue** orders, **All** orders, or orders that need your attention. By default, **Recent** orders are displayed in the Order List view (Orders you have worked on in the last 30 days).

Yellow indicators display on the order cards that need your special attention. This allows you to identify at a glance New orders, and orders that need your immediate attention: disputed comps, additional forms/supplements, and canceled orders.



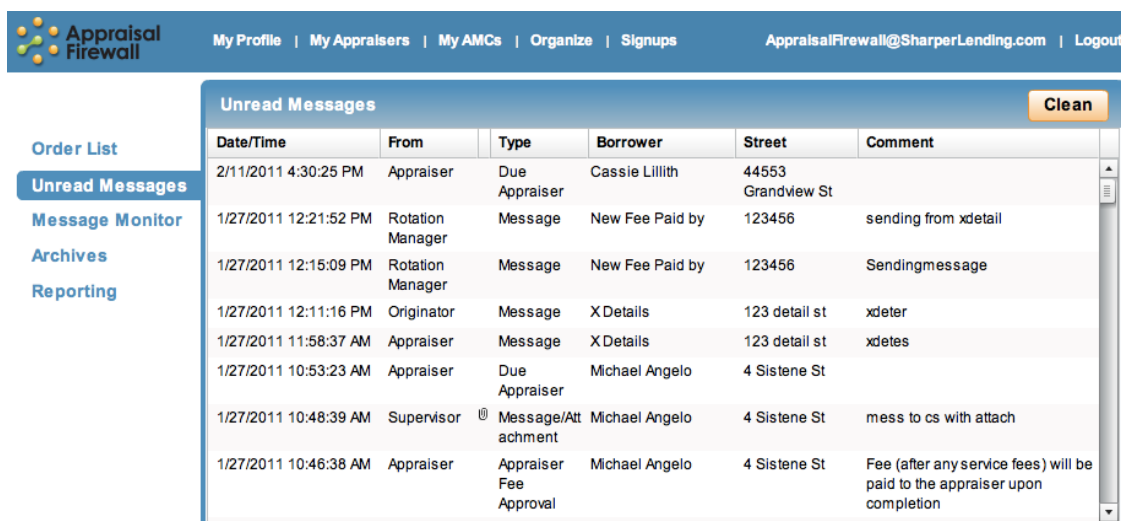
Click the **Lenders** tab under your Order List to view orders within a particular company. Double-click an order to view details and work within the order.



Search	#	Status	Borrower	Address	City	State	Date Order
Sample New	2917	done	Review Review	555 Tom Tom	Spokane	WA	02/10/2010
Sample Nothing	2916	done	Brief Review	987 Look Again S	Spokane	WA	02/10/2010
SANDMARQ	2912	cancelled	Glen Keane	4849567 Really F	Spokane	WA	02/09/2010
Schueler Real Estate Services	2910	cancelled	xDetail Test 2	5555 5th St	Spokane	WA	02/09/2010
sean	2909	cancelled	XDetail Test RM	444444 4th St	Spokane	WA	02/09/2010
sean	2875	assigned	Larry Clock	123 Marvin Rd	Spokane	WA	01/27/2010
Security One Lending	2839	assigned	No Answer	Seven Ate Nine	Spokane	WA	01/26/2010
self	2834	appraiser	Totally Fake	78 Tester St	Spokane	WA	01/26/2010
Sequoia Pacific Lending	2788	scheduled	Susan Green	745 Green St	Spokane	WA	01/21/2010
Serenity Inc	2787	cancelled	Marvin Jay	321 Sunset	Spokane	WA	01/21/2010
Serenity Inc	2785	cancelled	Mildred Tucker	456 Stix Rd	Spokane	WA	01/20/2010
Serenity Inc	2782	assigned	Shawn Jackson	543 Tamarack Dr	Spokane	WA	01/20/2010

Unread Messages

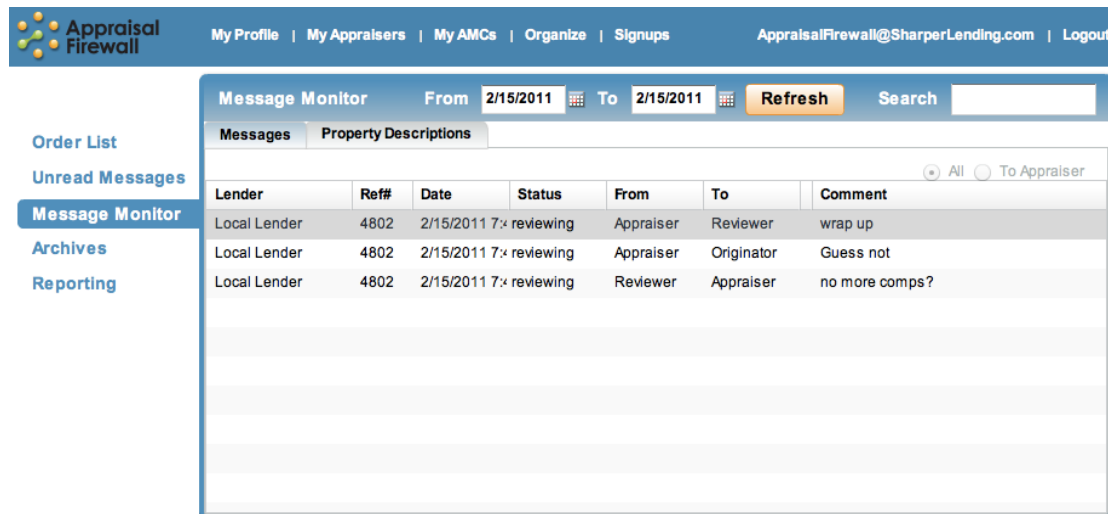
The **Unread Messages** link gives you a quick view of communications, statuses, and billing activities that go back and forth between lenders and appraisers in Appraisal Firewall. Double-click on any message to open that specific order, as well as clear the message from the unread list.



Date/Time	From	Type	Borrower	Street	Comment
2/11/2011 4:30:25 PM	Appraiser	Due Appraiser	Cassie Lillith	44553 Grandview St	
1/27/2011 12:21:52 PM	Rotation Manager	Message	New Fee Paid by	123456	sending from xdetail
1/27/2011 12:15:09 PM	Rotation Manager	Message	New Fee Paid by	123456	Sendingmessage
1/27/2011 12:11:16 PM	Originator	Message	XDetails	123 detail st	xdeter
1/27/2011 11:58:37 AM	Appraiser	Message	XDetails	123 detail st	xdetes
1/27/2011 10:53:23 AM	Appraiser	Due Appraiser	Michael Angelo	4 Sistene St	
1/27/2011 10:48:39 AM	Supervisor	Message/Attachment	Michael Angelo	4 Sistene St	mess to cs with attach
1/27/2011 10:46:38 AM	Appraiser	Appraiser Fee Approval	Michael Angelo	4 Sistene St	Fee (after any service fees) will be paid to the appraiser upon completion

Message Monitor

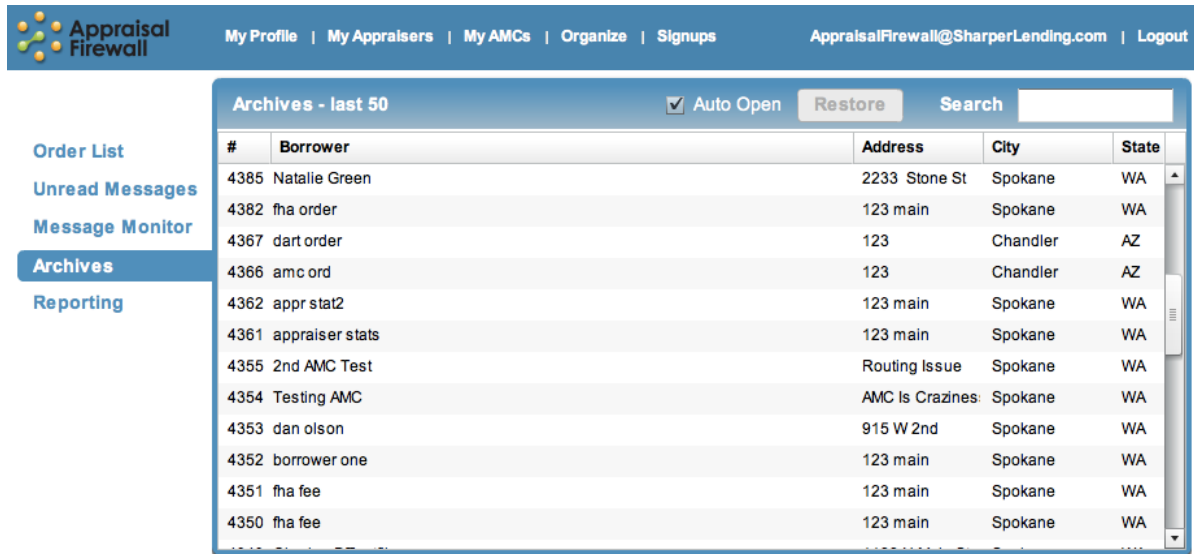
Use **Message Monitor** to quickly view messages between lenders and appraisers to assist with HVCC compliance concerns, and intervene to help troubleshoot user issues. Double-click on any message to open that specific order. You can even view messages by a specified date range.



Lender	Ref#	Date	Status	From	To	Comment
Local Lender	4802	2/15/2011 7:xx	reviewing	Appraiser	Reviewer	wrap up
Local Lender	4802	2/15/2011 7:xx	reviewing	Appraiser	Originator	Guess not
Local Lender	4802	2/15/2011 7:xx	reviewing	Reviewer	Appraiser	no more comps?

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.

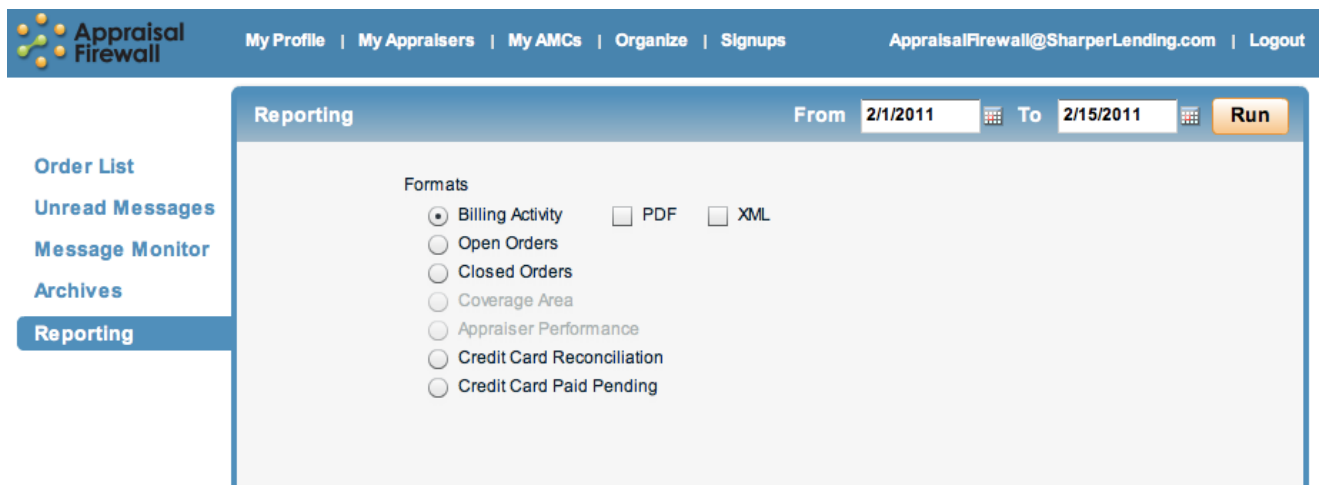


Archives - last 50 Auto Open Search

#	Borrower	Address	City	State
4385	Natalie Green	2233 Stone St	Spokane	WA
4382	fha order	123 main	Spokane	WA
4367	dart order	123	Chandler	AZ
4366	amc ord	123	Chandler	AZ
4362	appr stat2	123 main	Spokane	WA
4361	appraiser stats	123 main	Spokane	WA
4355	2nd AMC Test	Routing Issue	Spokane	WA
4354	Testing AMC	AMC Is Crazines	Spokane	WA
4353	dan olson	915 W 2nd	Spokane	WA
4352	borrower one	123 main	Spokane	WA
4351	fha fee	123 main	Spokane	WA
4350	fha fee	123 main	Spokane	WA

Reporting

Run a billing report from the **Reporting** tab to track and manage Billing Activity, Open Orders (not yet completed), and Closed Orders (completed). You can also run a report for credit card reconciliation and view pending credit card payments.



Reporting From To

Formats

- Billing Activity PDF XML
- Open Orders
- Closed Orders
- Coverage Area
- Appraiser Performance
- Credit Card Reconciliation
- Credit Card Paid Pending