



COLLATERAL
— MANAGEMENT —

User Guide for Clients

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Home Screen

The Home Screen or Client/Lender Dashboard provides users with access to important information, every time they log into ValueLink Appraisal Management Software. The Dashboard provides an overview of all orders in the system. Users also have the ability to quickly Create Orders, Search for Appraisals and Submit Payments for Appraisals from the Dashboard.

Phone: 1-954-491-9800 Email: orders@collateralmanagement.org

Home Appraisals AVM Reports

Search

Order an Appraisal

Search Appraisals

Submit a Payment

| Active Orders | |
|-------------------|----|
| All Active Orders | 60 |
| In Review | 4 |
| Revision Requests | 3 |
| Rush Orders | 0 |
| Orders Past Due | 11 |
| Orders Due Today | 0 |
| Orders on HOLD | 0 |
| Other Orders | 1 |

Upcoming Deadlines

| Thu | Fri | Sat | Sun | Mon | Tue | Wed |
|-------|-----|-----|-----|-----|-----|-----|
| Today | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

All Active Orders (60)

| Order Details | People | Dates | Item(s) | Status |
|---|-----------------|---|-----------------------------|------------|
| R13-00111 3726 Poplar St Dawson IA 50066 Type: Residential Appraisal Loan #: TCO2-DU90 Borrower(s): Alice Firstimer | Ordered By: N/A | Ordered: 7/10/2013 Due: N/A Insp: N/A | URAR - Single Family - 1004 | Unassigned |

Users can quickly track appraisal orders by clicking on the status under the **Active Orders** section on the left side of the screen. By default, All Active Orders are displayed on the right side of the screen. The Upcoming Deadlines calendar lets users stay on top of their orders by highlighting orders that are coming due in the next 14 days.

Upcoming Deadlines

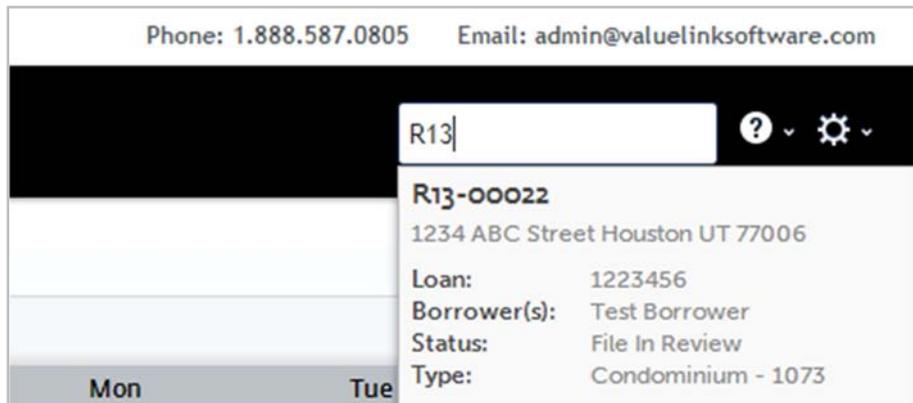
| Thu | Fri | Sat | Sun | Mon | Tue | Wed |
|-------|-----|-----|-----|-----|-----|-----|
| Today | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

The **Active Orders** summary provides a quick overview of all orders for that client which have been created and not yet been completed. It provides summary information of that order by including information such as the property address, the loan number, the borrower, ordering dates and the current status of the order. Orders which are marked with red boundaries are orders currently in revision. This ensures that no information is missed and that clients/branches/departments are aware of active orders at all times. Users can see orders for a particular status by clicking on it.

| Active Orders | | 29 | 30 | 31 | 1 | 2 | 3 | 4 |
|--------------------------|----|----|----|----|---|---|---|---|
| All Active Orders | 60 | | | | | | | |
| In Review | 4 | | | | | | | |
| Revision Requests | 3 | | | | | | | |
| Rush Orders | 0 | | | | | | | |
| Orders Past Due | 11 | | | | | | | |
| Orders Due Today | 0 | | | | | | | |
| Orders on HOLD | 0 | | | | | | | |
| Other Orders | 1 | | | | | | | |
| Other Orders | | | | | | | | |
| Completed | 9 | | | | | | | |
| Archived | 0 | | | | | | | |
| Cancelled Orders | 0 | | | | | | | |

| Revision Request (3) | | | | |
|---|--------------------------------------|---|--|----------------|
| Order Details | People | Dates | Item(s) | Status |
| R13-00022 1234 ABC Street Houston UT 77006 Type: Residential Appraisal Loan #: 1223456 Borrower(s): Test Borrower | Ordered By: N/A | Ordered: 12/20/2012 Due: 12/13/2012 Insp: N/A | Condominium - 1073 1004D - Mobile Home Final Inspection AVM | File In Review |
| R12-00011 1233445 Testing Houston TX 77006 Type: Loan #: 1233445455 Borrower(s): Testing UCDP4 | Ordered By: ABC Mortgage User Two | Ordered: 10/12/2012 Due: 10/17/2012 Insp: N/A | URAR - Single Family - 1004 | File In Review |
| R12-00009 123344 Test Street Houston TX 77005 Type: Loan #: 6564169848132 Borrower(s): Testing UCDP 3 | Ordered By: ABC Mortgage User Two | Ordered: 10/9/2012 Due: 10/10/2012 Insp: N/A | Condominium - 1073 | In Progress |

The **Quick Search** bar is available at the top right of all screens and lets the user search for orders by the Order Number, Borrowers Name, Property Address, Loan Number. It is a fast and convenient way for the user to quickly jump to the order they want to see.



Appraisals

Create an Appraisal Order

To **create an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) Click **Order An Appraisal** on the Home Page
- 3) Select Order Type (Residential or Commercial)
- 4) Fill out the fields on the order form. For Residential Orders, you may import loan data from a **Fannie Mae 3.2 loan** file to populate the relevant fields
- 5) All fields marked **(required)** have to be filled out.
- 6) Click **Continue** to review the information for the order
- 7) Click Save to save the order in the system

NOTE: Select the Loan Officer in the Ordered By Drop Down under **Client Details**. You may add up to 3 processors per order who can access the order

Search for an Appraisal

To **search for an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) Click **Search Appraisals** on the Home Page
- 3) Filter your results by selecting any of filter criteria available on the left side of the screen.

You may search by the loan number, appraisal number, property address, county name or borrower name using the keyword field

- 4) Click **Apply Filter** to search the system. Results are returned in a grid format
- 5) Orders marked with a red boundary are orders for which a revision has been requested
- 6) Click the **Appraisal Number** (e.g. R13-00000) to view details for the appraisal

Add a supporting document to an appraisal

Users associated with an appraisal order can add supporting documents to it. Documents can be added to any Appraisal with the exception of those that are completed or cancelled.

To **add a document to an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to add the document
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Scroll down to the **Other Supporting Documents** section
- 5) Click the **Add Document** button on the right side of your screen
- 6) Select the document type and browse your computer for the file you want to upload
- 7) Check the **“Share with Appraiser”** box if you want the document to be visible to the appraiser.
- 8) Click the **Submit Document** to add the document to the selected Appraisal

Note: Uploaded documents can only be deleted by the system administrator.

Add a comment to an appraisal

Comments are the fastest way to disseminate information about the order to all parties involved in the Appraisal Order.

To **add a comment to an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order in which you want to add the comment
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Scroll down to the **Comments** section
- 5) Click the **Add Comment** button on the right side of your screen
- 6) On the add comment screen, enter the comment in the space provided
- 7) Click the **Add Comment** button to save the comment and return to the appraisal screen

Cancel an appraisal

To **cancel an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order which you want to cancel
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Click on the **Actions** button on the top right of your screen to reveal options
- 5) Click on the **Request Cancellation** option
- 6) Provide a Cancellation Reason in the space provided
- 7) Click on the **Send Request** button to cancel the order

Note: Once canceled, an appraisal will become read only, and no changes can be made to the appraisal thereafter. Only the system administrator may re-activate the order.

Retrieve an appraisal report

If you want to **retrieve an appraisal report** for a completed order, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to retrieve the appraisal report
- 3) You can also click on the **Completed** option on the Home Page to view completed orders for which reports are available
- 4) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 5) Scroll down to the **“Report(s)”** section to view submitted reports
- 6) Click on the file name to download the report
- 7) Save the report to your local disk by right-clicking on the document and clicking **“Save Link As”**

Note: This option is only available for appraisals that have been completed and the report has been released.

Request an Appraisal Revision

If the Clients/Branches/Departments are not satisfied with the **appraisal report**, they may request a revision to the appraisal report. To request a revision, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to request a revision
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Click on the **Actions** button on the top right of your screen to reveal options
- 5) Click on **Request Revision** option
- 6) Enter the reason why the revision is being requested under the Revision Reason field
- 7) Click on the **Submit** button. The system administrator will be informed of the revision request

Email Appraisal Report

Once the appraisal reports are received by the lender, they may email the report to the client or whomever they prefer. To **email an appraisal report**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to email the appraisal report
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Click on the **Actions** button on the top right of your screen to reveal options
- 5) Select the **Email Appraisal Report(s)** option
- 6) Select Client on the "Email Report(s) To" field to mail the report to the client OR select Other to email the report to any email address
- 7) Select the report(s) that you want to email to the recipient
- 8) Add a message with your email (Optional)
- 9) Click on the **Email Appraisal Report** button to send the email

Note: Only files under 10 MB in size can be mailed from the system. You must download larger files and send them by email to recipients.

Reporting

Ad-hoc Appraisal Report

To run an **Ad-Hoc Appraisal Report**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) Click **Reports** on the main menu
- 3) Click **Ad-Hoc Report** on the sub menu
- 4) Filter your results by selecting any of the fields below:
 - a. Keyword (searches the Appraisal Number and the Appraisal Description. Partial matches are allowed)
 - b. Lender
 - c. Appraiser
 - d. Appraisal Type
 - e. Appraisal Status
- 5) Select a **Start Date** and the **End Date** for the report
- 6) Click **Generate Report** to get results. Results are returned in a grid format
- 7) Click the **Details**  icon to view details for each Appraisal
- 8) Click on the **Export to Excel** icon  to export the results to Microsoft Excel

Billing

View Invoice

Order invoice is generated when the order is created in the system. To **view the invoice for an appraisal**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to view the invoice
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Click on the **Actions** button on the top right of your screen to reveal options
- 5) Click on **View Invoice** option to view the invoice for that order
- 6) The invoice may be printed, emailed or saved as a PDF file from this screen by clicking on the Actions button on the top right of your screen

Note: Invoice details are populated once the administrator accepts and assign the order.

Make Payment

Clients can make payments for completed orders directly from the system. To **make a payment**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) **Search** for the Appraisal Order for which you want to make the payment
- 3) Open the Manage Appraisal screen by clicking on the Order Number (e.g. R13-00000)
- 4) Click on the **Actions** button on the top right of your screen to reveal options
- 5) Click on **View Invoice** option to view the invoice for that order
- 6) Click on the Actions button and select the **Pay for this Order** option
- 7) Fill out the relevant details on the Make a Payment screen
- 8) Click on the **Make Payment** button to pay for the order

Note: Payment for multiple orders can be made by clicking on the Submit a Payment button on the home page.

User Profile

Change Profile Information

To **change your profile information**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) Click on the settings icon  that appears in the top right of the screen and select the **My Profile** option
- 3) You may update the first name, last name, and email address on this screen
- 4) Select the **Copy on emails for orders?** checkbox to enable email notification for all orders

Click **Save Changes** to update your profile

Change Password

To **change your password**, follow the steps below:

- 1) Log on to your ValueLink Appraisal Management System account
- 2) Click on the settings icon  that appears in the top right of the screen and select the **Change Password** option
- 3) Enter your current password, new password, and confirm the new password
- 4) Click the **Change Password** button