

User Guide

AppraisalScope

v1.0

CoreLogic®

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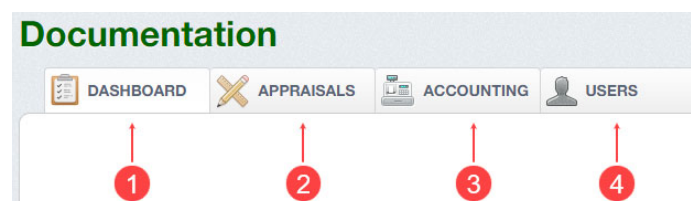
CHAPTER 1. APPRAISAL SCOPE OVERVIEW AND LANDING PAGE FUNCTIONALITY

Navigation details

The Appraisal Scope landing page is the main point of access for platform users. Here, users will access controls to intake clients, set up workflows, and manage ongoing business through a main tab menu at the top of the page.

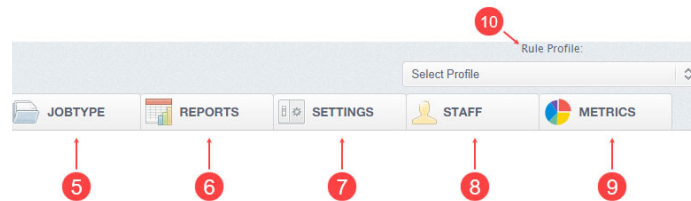
Each tab in the main tab menu marks a point where a user can gain entry to the building blocks of an Appraisal Scope platform-version. The following summaries and corresponding diagrams provide an overview of the functionality behind each landing page element.

1. The **Dashboard** tab offers functionality designed to help staff users efficiently manage their order workload, with multiple ways to filter order queues, and quick visibility into any order status.
2. The **Appraisals** tab allows AMCs to search for, access, edit details, and perform tasks related to the orders they are managing.
3. The **Accounting** tab gives AMCs access to financial information to manage accounts, pay appraisers, send invoices, and calculate commissions.
4. The **Users** tab offers AMCs access to their client and vendor profiles and all the controls for managing their relationships with clients and vendors.



5. The **Jobtype** tab is where AMCs will go to set up their product offerings in the platform. All of the tools are here to build fee schedules and choose how these fees will be applied for products ordered.
6. The **Reports** tab provides tools that AMCs can utilize to create, schedule, and run reports using data from their platform-version of Appraisal Scope.
7. The **Settings** tab gives AMCs a set of pages where they can configure administrative settings that will impact many aspects of their platform-version functionality. In addition, there are controls available here that will allow AMC staff users to set up visual and textual elements unique to their company.
8. The **Staff** tab gives AMCs a place to set staff members up with individual profiles. The staff profiles kept in the system hold all of the rule and permission settings that determine what type of tasks a staff user can perform.
9. The **Metrics** tab provides widgets that can be used to create custom dashboards displaying graphical representations of data.

10. The **Rule Profile** list is where an AMC staff user can see displayed the set of rules they're working under, and also choose from any set of rules that they have access to. These rules will determine what orders a staff user can view and be assigned.



The **Staff** list displays the name of the staff user to whom a particular platform-version configuration belongs. For staff administrators, the list will contain the names of all staff members using the platform. Administrators can choose from any of these names to be able to see and interact with that staff member's configuration.

11. The **New Order** button offers AMC staff the ability to place orders for an appraisal, an automated valuation model (AVM), or a regulatory compliance review (RCR).
12. The **All Reminder** icon is where staff users can see reminders that they and others within their organization have set.
13. The **Configure Dashboard** icon is where staff members can go to rearrange the elements on their dashboard by simply dragging and dropping boxes.
14. The **Help** link gives staff members access to the User Guide from their platform.
15. The **Logout** button is where staff can exit the platform when their tasks are complete.
16. The **Work Status link** offers staff members a way to notify other staff of when they're on the job or when they're on vacation.



Key user roles in Appraisal Scope

AMC staff users

Super-admin user

Super-admin users create staff admin users in the platform and set permissions that decide the types of communication these users receive and how much control will be available to that user within the platform. Super-admin users have access to all of the platform's functionality, and they can configure settings to define how product order and appraisal assignment workflows are managed.

Admin user

The role of the admin user depends, in part, on the permissions set by the super-admin user. With the right permissions, they can perform standard tasks associated with managing clients and vendors in the platform. Throughout this User Guide, AMC staff users are often referred to generically as admin users and AMC admin users. All three of these terms will simply refer to AMC staff members who will be performing any of the tasks detailed in any section of this document.

AMC clients

New AMC clients can be added to an Appraisal Scope platform-version by an admin user, or they can sign up for a platform-version when invited by an admin user. In the case of signing up by invitation, an admin user will provide the URL for the AMC's platform-version to the new client, and after accessing the platform, this new client will click the **Client Sign Up** tab from the Appraisal Scope **Sign In** page.

If this new client is signing up on behalf of his or her company, meaning that the company with whom the new client is affiliated doesn't yet have a profile in an AMC's platform-version, then the details that this new client enters will be used to create both client company and client user profiles within the platform. If, on the other hand, a new client is affiliated with a company that already has a profile in the AMC's platform-version, the details that this new client enters will be used to create a client user profile that will be merged with the already-existing client company profile.

Regardless of the scenario, when new clients sign themselves up, they will be in a Pending status until they've been accepted by an AMC's admin user. Once a new client is accepted, the details they provided at sign up will be added to the platform and associated with their affiliated client company and client user profiles. For more information regarding the profiles that contain client details and the way profiles function in Appraisal Scope, see the [Client company profile](#) section in Chapter 5.

Client company

The client company is the lender. When AMC admin users make choices and set options that determine how the orders placed in a platform-version of Appraisal Scope will be initiated, processed, and assigned, these choices will be made based on relationships between the AMC and its client companies.

Client user and client admin

Client users are managed and housed under a client company. Client users can sign themselves up for the platform and be approved by an admin user ([see above](#)), they can be registered in the platform by an admin user, or they can be registered in the platform by a designated client admin within the client company they're associated with.

Client users are further broken down in the platform as Processor, Manager, or Loan Officer, titles that are dictated by the role they play within the client company that they're affiliated with. Client users are, generally speaking, the users who place the orders in an Appraisal Scope platform-version.

Note: Although Appraisal Scope differentiates between Processor, Manager, and Loan Officer user types, for the purposes of this User Guide, these types are collectively referred to as simply client users. Also, client company is a term that may be used in this guide generically to refer to a lender that an AMC has a relationship with. The distinction between client company used in this general sense and client company used in reference to a specific profile on a platform-version should be clear from the context in which it's used within the User Guide.

AMC vendors

Vendor company

The vendor company is a collection of appraisers organized under the same umbrella in an AMC's platform-version. AMC admin users can create vendor company profiles in their Appraisal Scope platform-version, and then arrange the appraisers, as well as apprentice appraisers, that they've registered in their platform-version under this vendor company.

Vendor user

The vendor user is an appraiser that is registered on an AMC's Appraisal Scope platform-version. An AMC admin user can add a vendor user to their platform-version by obtaining the vendor user's license number from the Appraisal Scope Directory or the Appraisal Subcommittee (ASC) database. A vendor user can also be invited to, sign up for, and then be accepted into an AMC's platform-version.

Vendor users who are asked to sign up will be sent an invitation with the URL for an AMC's platform-version. The user will click on the URL, and then they'll click the **Appraiser Sign Up** tab at the **Sign In** page and fill in required details. As is the case with client users who sign themselves up, an appraiser will be in a Pending status until approved by an AMC admin user. Once an appraiser has been approved, they can accept work assigned to them by the AMC.

Important concepts

Functional levels

Functional levels constitute a foundational concept in Appraisal Scope because they work as a model for understanding how the many elements potentially impacting an AMC's order-fulfillment workflow fit together in the platform. These elements are a combination of tools, supplementary materials, and settings available for AMCs to use or not, depending on their needs.

It may be that an AMC wants all orders for a certain type of valuation product to be fulfilled in a standardized way. Or alternatively, the AMC might want certain orders placed for this product handled differently from others due to the differences in geographic areas concerned, or maybe due to the particular demands of a specific client. It's the AMC's mix of elements and configuration choices that will allow them to enact the scenario they require.

An essential component to Appraisal Scope's workflow flexibility lies in the use of settings applicable at four different functional levels: global, client company, branch, and client user. Settings can be configured at these levels in combinations that allow for a lot of workflow variation from one valuation product to the next, variation that might stem from client expectations, geographic variation, or shifting regulations, for example.

Beginning with the global level, an AMC can view the elements configured here as constituting the general framework and baseline rules that will dictate how their platform-version behaves. They are called global because they will impact how a platform-version functions in all cases, except those cases where settings configured at the client company, branch, or client user level take precedence and supersede the global level settings. It's these exceptional cases that are best handled through the other levels.

Settings established at the client company level will allow AMCs to make exceptions for scenarios dictated by their client companies' needs, but an AMC may find it necessary to be more specific than this when handling exceptions to the general rule. The branch level gives AMCs the power to subdivide a client company into units that can be based on whatever criteria make the most sense. This allows rules to be applied that will make the platform-version behave differently from branch to branch when orders originate within the same client company.

For the AMC that needs even more nuance with rule application, Appraisal Scope offers the option to configure individual client users within a branch. This makes it possible to suit the needs of an individual client user. Settings configured at the client user level allow AMCs to apply settings to orders placed by one client user that are different to settings applied to another client user's orders—even users within the same branch.

Profiles

Understanding the way profiles function is valuable for understanding how Appraisal Scope functionality translates to accomplishing business objectives. Profiles can be thought of as individual containers that exist in an AMC's Appraisal Scope platform-version to hold information. When an AMC adds a new client, for example, the details about where the client is located, who the contacts are for that client, and the way the orders originating with that client will be assigned to appraisers suitable to handle them are all stored in profiles.

Information about individuals or groups of users is associated with a platform-version through the profiles in which they're stored, and it's the profiles that allow AMCs to make use of this information to carry out their business. An AMC will establish profiles for both users of its platform-version and for the rule sets that will allow it to manage the users of its system. These profile types and the way each one functions within Appraisal Scope are detailed below.

User profiles

Each user and client company that an AMC has on staff, assigns orders to, or does business with will have their own profile within a platform-version of Appraisal Scope. These profiles will be stored in the system, and AMC admin users will interact with profiles to perform many tasks related to managing relationships with clients and appraisers.

Profiles can be created by admin users, client users, client admins (on behalf of fellow client users), and vendor users. When a new user signs up and is subsequently accepted—or when an admin user signs a new user up—for an AMC's platform-version, that user's profile is created and becomes a part of the platform-version going forward.

Client company profiles act as containers, housing the profiles of users who place orders on behalf of a client company. These users are referred to as client users in Appraisal Scope, and they can be further organized into groups that are stored under a client company profile as branches. AMC admin users can set configurations at the client company, branch, and client user profile levels, giving an AMC the flexibility to customize the way its platform-version processes orders, client by client.

Vendor company profiles also act as containers, housing the profiles of users who are eligible to perform appraisals. Vendor users who are contained within a vendor company profile can be further organized into vendor company branches. Admin users can select from a few options at the vendor company level that will impact users organized under the vendor company profile. There are also a few options available to admin users to set permissions at the vendor company branch level that will impact individual vendor users.

Vendor users can also operate in a platform-version as single entities, however, meaning that they do not have to be contained under vendor company profiles. When they are contained under vendor company profiles, though, these vendor users can be broken up still further in Appraisal Scope into Manager, Appraiser, and Apprentice Appraiser, defined roles that are stored in a platform-version as part of the vendor company profile.

And finally, AMC staff users will be associated with staff profiles in the AMC's platform-version. Staff users with administrative responsibilities are able to set configurations at this staff profile level that will dictate which orders are assigned to staff users, the type and number of email communications a staff user receives, and the platform-interface experience that a staff user will have.

Rule profiles

Rule profiles are excellent tools for helping staff users to focus on individual aspects of their range of responsibilities. Appraisal Scope offers two types of rule profiles, the Admin Rule Profile and the Reviewer Rule Profile. These profiles can be set up in many different ways, and AMCs have control over how they'll be configured and how they'll be used.

The rules in rule profiles are conditions that an AMC staff user will set which will determine what that rule profile is intended to do and how it will interact with an AMC's platform-version. Ultimately, when rule profiles are being used by an AMC, Appraisal Scope will run orders past the profiles to see if specific order details correspond to the conditions that have been set. When details match up, a rule profile is triggered and instructs Appraisal Scope to do something with the order that triggers it.

Because AMCs can configure as many rule profiles as they want and with as many variations as they see fit, these profiles are of tremendous value for management application. For specific information about how rule profiles work, an expanded look at the ways they are of benefit to AMCs, and procedural details for configuring rule profiles, see the [Admin Rule Profiles](#) page and [Reviewer Rule Profiles](#) page sections.

Ordering an appraisal

1. From the landing page, click **New Appraisal**, or **New Order** if your platform-version is configured for AVM and RCR order types.
2. If you've clicked **New Appraisal**, the **Request a New Appraisal** page will open. If you've clicked **New Order**, select **Appraisal** from the menu, and the **Request a New Appraisal** page will open.
3. Click the **Appraisal Form** drop-down box and choose a valuation product from the list.
Note: Repeat this action for drop-down lists with red asterisks, and then fill in boxes with red asterisks. Be aware, though, that the loan number is also required. Proceed to step 4.
4. Next, Enter the loan number in the **Loan #** text box.
5. To change the entity name that will display on the appraisal report when it's complete, click on the **Client displayed on report** drop-down and select an option from the list.
Note: This list is determined by configurations set by an AMC admin user (see Client on Report section for more information).
6. If you'd like to notify any other client users within your company about the order you're placing, click the **Notify Users** drop-down box, and select the relevant check boxes from the dialog box that appears. Click anywhere outside of the dialog box when you're finished.
7. Enter information in all required text boxes throughout the order form, and in any other text boxes associated with information that's not required but that you'd like to provide.
8. In the **Fee Information** section of the order form, note the button bar that allows you to change the text boxes that are available to enter details beyond just the borrower's details.
9. Once you've finished inputting all required and otherwise relevant information, click Submit.
10. Depending on your configurations, the **Secure Online Appraisal Payment** dialog box may appear. If it does, make your preferred payment choice and click **Submit** to finish the order.

CHAPTER 2. STAFF: TAB FUNCTIONALITY AND RELATED CONCEPTS

Staff tab

The **Staff** tab contains a set of pages that allows AMC's to manage members of their staff. AMC staff users with administrative responsibilities will set up staff profiles here for all of the staff users on an AMC's platform-version. A user will click the **Staff** tab from the main tab menu to access these pages.

When a staff user clicks the **Staff** tab, the **Staff** tab menu will display. This menu consists of the **Staff**, **Groups**, **Admin Rule Profiles**, **Reviewer Rule Profiles**, and **Super Admin** buttons, as well as **Failure Order** buttons for any integrations that a platform-version has set up. Each of these menu items opens into a separate page, and the functionality available from each page is documented in this chapter.

Staff page

When an AMC staff user clicks on the **Staff** tab, they will land on the **Staff** page. From here, users can create and configure new staff profiles, and they can manage permissions and rule profiles they want to assign to staff users through these staff profiles. AMC's are also able to set staff users with limited permissions or super-admin user permission from the **Staff** page.

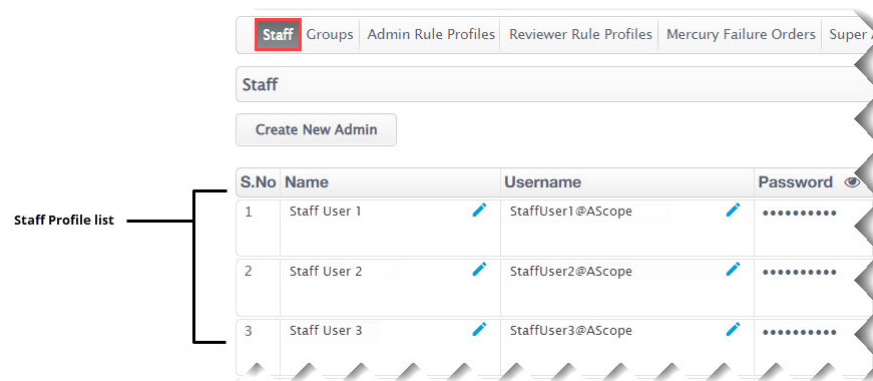
Staff users can also make modifications to personal information associated with staff profiles from the **Staff** page. Common tasks related to staff profiles and the procedures corresponding to these tasks are covered in the following sections.

Note: Staff profiles do not necessarily need to correspond to an individual staff user. These profiles are essentially an organizational tool to which AMC's can apply settings. For instance, if an AMC wants to use Appraisal Scope to assign certain tasks to all staff users whose roles naturally overlap, such as all loan processors for example, then creating a staff profile for this role, configuring the profile accordingly, creating an Admin Rule Profile that is configured to reflect the AMC's vision for that role, and assigning the Admin Rule Profile to the staff profile would be one way an AMC can use the staff profile to manage their staff. The specific procedures and concepts around how staff profiles and other Appraisal Scope tools interact will be detailed in the following sections.

Creating a new staff profile

REQUIRED PERMISSION

AMC staff users with Set Admin permission can create new staff profiles. To provide a staff user with this permission, click the **Staff** tab, locate the staff profile to modify from the **Staff Profile** list, and click the blue hyperlink text **Tab** in the **Tabs** column of the **Staff Profile** list.



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Staff profiles once created will be incorporated into the **Staff Profile** list on the **Staff** page. All staff profiles kept in an AMC's platform-version will be accessible from this list.

PROCEDURES

1. From the landing page, click the **Staff** tab on the main tab menu to open the **Staff** page.
2. Next, click **Create New Admin** and enter all requested details in the text boxes of the **Create Admin** dialog box.
3. When you assign the password, make sure it's a minimum of eight characters and consists of at least one uppercase letter, one lowercase letter, and one number or symbol.
4. After all information has been entered, click **Create**.

Configuring staff profiles

Staff profiles are accessible from the **Staff Profile** list on the **Staff** page. Each profile appears as a separate entry in the **Staff Profile** list. Staff users can make edits to the name, username, password, or email address associated with any staff profile by clicking the **Pencil** icon in the informational field to be edited.

Beyond these simple edits, staff users can perform several types of configurations in the system. These configurations will be covered in the following procedures.

CONFIGURING STAFF PROFILES FOR AMC SALES PEOPLE

A staff user will configure an AMC sales person's staff profile from the **Staff Profile** list. The procedures for configuring a sales person's staff profile follow.

Assigning client companies to AMC sales people and disassociating client companies from AMC sales people through the staff profile

1. From the landing page, click the **Staff** tab on the main tab menu to open the **Staff** page.
2. Locate the entry that you want to modify in the **Staff Profile** list, and click the check box in the **Sales Person** field.
3. The setting control **Assignment** will appear next to the check box.
4. Click **Assignment**, and then click **Show Add or Remove** companies.

- Two columns will open on the page: the left column is a menu of client companies, and the right column is a list of client companies to which a sales person is currently assigned.
- If you want to add companies to a sales person's assignments, scroll in the left column menu or use the **Search Client(s)** text field to find the client companies you want to add, click the company name and then the **Right Arrow** for each company, and when the right column is populated with all relevant entries, click **Add or Remove companies**.
- Assigning a client company to a sales person in this way will add the companies to the **Commission Configuration** list associated with this sales person's staff profile.
- To remove a company from a sales person's assignments, click the client company in the right column, click the **Left Arrow**, and then click **Add or Remove companies**.
- Disassociating a client company from a sales person in this way will remove a company from the **Commission Configuration** list associated with this sales person's staff profile.

Setting sales commissions through the staff profile

An AMC staff user will set commissions and commission calculation criteria from the **Commission Configuration** list that's associated with a staff profile. Users can set commissions, adjust how commissions will be calculated, and set the fees to apply at the branch or broker level from this list. Procedures for how to perform these configurations follow.

Setting AMC sales person commissions

- From the platform landing page, click the **Staff** tab on the main tab menu to open the **Staff** page.
- Locate the entry that you want to modify in the **Staff Profile** list, and click **Assignment** in the **Sales Person** field.
- The **Commission Configuration** list will appear.
- Be sure that the check boxes coinciding with the client companies you want to set or adjust commissions for are selected in this **Commission Configuration** list, and that the other check boxes are clear.
- Next, to set new commissions, click **Set Commissions For Selected**, located above the list, and the **Set Commissions For All Selected Company Branches** dialog box will open.
- Commissions are assigned by jobtype in this dialog box, so choose from the Jobtype List, click the corresponding **Commission Type** drop-down list, and choose **Flat Fee** or **Percentage**.
- Enter the flat fee amount or percentage into the corresponding **Commission** text field, and when you're finished setting these commissions, click **Apply to All**.

Configure Appraisal Scope to re-calculate sales person commissions

- From the **Commission Configuration** list, you can have Appraisal Scope re-calculate commissions in one of two ways.
- To do a bulk re-calculation, select the check boxes coinciding with the client companies you want to re-calculate commissions for and clear the others, then click **Re-calculate Commissions For Selected** from above the list.
- Alternatively, find the specific client company in the **Commission Configuration** list for whom the commission needs to be re-calculated, and click **Re-calculate commissions** in the right column of the list.
- When the **Re-Calculate Commission** dialog box opens, click in the **From (Ordered Date)** text box.
- In the calendar that appears, find the starting date of the period for which commissions need to be recalculated by clicking on the left or right arrows to locate the appropriate month, then click the start date.
- To set the end date of the period for which commissions need to be recalculated, click in the **To (Ordered Date)** text box and choose the appropriate date the same way as in step 5.

7. Once the date range has been established, choose the commission to recalculate by clicking the check box that corresponds to the relevant **Jobtype**, click the corresponding **Commission Type** drop-down box, and choose whether the re-calculated commission will be a Flat Fee or Percentage.
8. Enter the flat fee amount or percentage into the corresponding **Commission** text field, and after you're finished, click **Save**.

Setting AMC sales person commissions to assign by branch or by broker

1. For cases where commissions need to be set or re-calculated at a client branch or broker level rather than the client company level for a particular client, locate the company, click **Set Fees By Branch** or **Set Fees By Broker** in the field associated with that company, and then choose the branch or broker by selecting or clearing the appropriate check boxes from the list that appears.
2. When the appropriate branch or broker has been selected, click the **Set Commission** or **Re-calculate commissions** field associated with that branch or broker, and when the corresponding dialog box appears, configure your platform-version to calculate the commission using the same procedures established above for setting or re-calculating commissions.
3. If you want to close the **Branch** or **Broker** list that you've opened under a client company entry, click **Close Branch List** or **Close Broker List** in the **Set Fees by Branch** or **Set Fees By Broker** field of the client company entry.

CONFIGURING STAFF PROFILES FOR AMC STAFF REVIEWERS AND ASSIGNING REVIEWER RULE PROFILES

An AMC staff user can configure the staff profile of an AMC staff reviewer from the **Staff Profile** list. To configure a reviewer's staff profile, a user will locate the entry in the **Staff Profile** list and select the check box corresponding to that entry from the **Reviewer** column. The user will then click the drop-down box and choose whether to assign this reviewer a rule profile from the list of Reviewer Rule Profiles that appear, or whether to leave the staff profile configured as **Manual** (see the [Reviewer Rule Profiles page](#) section for details on these rule profiles).

Note: staff reviewers configured for manual assignment can be assigned (or can assign themselves) as the Reviewer on a given order, whereas staff reviewers assigned to a specific Reviewer Rule Profile will be automatically assigned as Reviewer on an order based on the parameters of that Reviewer Rule Profile.

CONFIGURING EMAIL SETTINGS FOR A STAFF PROFILE

Staff users can configure email settings for a staff profile by clicking **Email** in the staff profile entry. This action will open the **Email Notifications** page. The **Email Notifications** page is divided into five sections based on the types of potential email notifications the configurations pertain to: **Process Statuses**, **Other Order Notifications**, **General Notifications**, **Appraiser Profile Updates**, and **Integration Notifications**.

The configuration controls in the **Process Statuses** and **Other Order Notifications** sections are divided into four columns: **None**, **Only for assigned orders**, **Based on assigned rule profile**, and **All orders**. When a staff user makes a selection from one of these four columns, they are choosing under which conditions, if at all, the owner of the staff profile will receive an email when one of the listed statuses or order notifications occurs when an order is being processed.

Users may also note that there is a continuum graphically represented above the four columns that ranges from **Fewer Emails** to **More Emails**. This continuum is meant to give the user a general idea of how many emails a particular configuration can be expected to generate.

The configuration controls in the **General Notifications**, **Appraiser Profile Updates**, and/or **Integration Notifications** sections are at the bottom of the page. A staff user will select the check boxes associated with any notifications they'd like the owner of the staff profile to receive. If all notifications under any of these notification categories are desired, the user can select the check box that corresponds to the

category heading.

The **General Notifications** category contains administrative events that can cause Appraisal Scope to trigger notifications to a staff user. Staff users configured for these notifications will receive a message when one of these events occurs.

The **Appraiser Profile Updates** category shows certain actions a vendor user can take in an AMC's platform-version. When the check boxes associated with these actions are selected, the affected staff user will receive notifications when a vendor user performs one of the actions.

The **Integration Notifications** category consists of the integrations that an Appraisal Scope platform-version will monitor for order failures. Staff users configured for these Integration Notifications will receive a message when an order fails due to a selected integration.

After modifications are made from this page, the user will click **Save** to apply all Email Notifications configurations to the affected staff profile.

ASSIGNING ADMIN RULE PROFILES TO A STAFF PROFILE

An AMC staff user will assign an Admin Rule Profile to a staff profile from the **Staff Profile** list. To assign an Admin Rule Profile, the user will click the drop-down box in the **Rule** field associated with the relevant staff profile and select the appropriate Admin Rule Profile from the drop-down list (please see the [Admin Rule Profiles](#) page section for details on these rule profiles).

SETTING A VACATION NOTIFICATION IN A STAFF PROFILE

Staff users can set a vacation off date from the **Staff Profile** list. To set this date, users will select the check box in the **Vacation** field associated with the appropriate staff profile. When the **Set Vacation Off Date** dialog box opens, enter the date in the **Vacation Off Date** text field and click **Save** to apply the date to the staff profile. This configuration will temporarily remove a staff member from any [round robin order assignments](#) for the duration of that staff member's vacation.

Note: An AMC staff user will need to make sure that the **Vacation** check box is cleared when a staff member returns from vacation so that they can be reincluded in the round robin assignment queue. Configuring a staff user's Appraisal Scope platform-interface from a staff profile

A super-admin user can configure a staff user's Appraisal Scope platform-interface from the **Staff Profile** list. To configure a staff user's platform-interface, a super-admin will click **Tab** in the **Tabs** field associated with the relevant staff profile. When the **Tab Permission** dialog box opens, the user will select the check boxes for the tabs and associated subtabs that they want the owner of the staff profile to be able to see and interact with, and clear the check boxes coinciding with the tabs and subtabs that they don't want the owner of the staff profile to see. They will click **Save** to apply these configurations.

CONFIGURING GROUPS SETTINGS IN A STAFF PROFILE

AMC staff users can assign a staff profile to a group from the **Staff Profile** list. To modify the staff profile in this way, the user will click **Groups** in the **Groups** field corresponding to the relevant staff profile. When the **Staff Groups** dialog box opens, the staff user will select the check box corresponding to the group they wish to affiliate the staff profile with and then click **Submit** (see the [Groups page](#) section for details about groups).

CONFIGURING PERMISSIONS SETTINGS IN A STAFF PROFILE

A staff user can configure the level of administrative power that the owner of a staff profile will have in an Appraisal Scope platform-version from the **Staff Profile** list. To modify permissions, the staff user will click **Permissions** in the **Permissions** field that corresponds to the relevant staff profile. This action will open the **Staff Permissions** dialog box. In this dialog box, the user will select the check boxes that correspond to tasks that they want the staff profile owner to be able to perform, and they will leave clear the check boxes corresponding to all other tasks. They will click **Save** to apply the configuration to the staff profile.

SETTING UP AN EMAIL SIGNATURE IN A STAFF PROFILE

AMC staff users can create and set email signatures from the **Staff Profile** list. To create these signatures, users will click **Edit** from the **Signature** field of the relevant staff profile. This action will open the **Signature** dialog box. They can then create an email signature in the text field of the **Signature** dialog box, using the available text editing controls to make style and formatting choices. Staff users will click **Save** to apply the new signature to the staff profile.

USER LOGIN LOG AND DELETING STAFF PROFILES

Staff users can view a **User Login** log associated with a staff profile from the **Staff Profile** list. A user will click the **Clipboard** icon in the **Log** field of the relevant staff profile to open the **User Login Log** box. Records of the date and time of login and logout activity associated with a staff profile will be available here. A user will click **Close** to return to the staff profiles.

A staff user can also delete a staff profile from the **Staff Profile** list by clicking the **Delete** icon in the **Delete** field of the relevant staff profile. This action will remove the staff profile from the AMC's platform-version.

Groups page

The **Groups** page gives AMCs the capacity to consolidate permission settings that would generally apply to a group of staff users who perform a similar role within the AMC. A good example for purposes of illustration here would be to consider an AMC's procurement team. The members of this team would never be expected to manage an order through the Appraisal Scope workflow, but they may be responsible for tasks for which access to financial information is needed. In this scenario, a group would be created and configured with permissions that would allow all its members to perform these tasks. A staff user would then need to make sure that each staff profile associated with the members of the team was associated with this group (see [Configuring Groups settings in a staff profile](#)).

Note: The permissions available to be configured for groups are the same as those available to be configured by individual staff profile in the **Permissions** column of the **Staff Profile** list. This **Groups** tab functionality, then, is ideal in scenarios when an AMC needs to modify a Permission configuration scheme in a way that will impact all staff users performing a particular role, rather than just for an individual user.

ADDING AND CONFIGURING A GROUP

1. From the landing page, click the **Staff** tab on the main tab menu, and then click the **Groups** tab on the **Staff** tab menu.
2. Next, click **Add Group** from the **Groups** page.
3. When the **Create a new group** dialog box opens, enter a group name and click **Submit**.
4. Choose which Permissions you want to apply to the group, and select each check box that corresponds to a permission.
5. Click **Save** when you're finished. The group will now be available to apply from the **Staff Profile** list.

Note: The permissions associated with a group can be changed at any time by selecting or clearing check boxes. Just remember to click Save each time to apply the changes.

EDITING OR DELETING A GROUP

Staff users can also edit the group name associated with a group and delete any group from the **Groups** page. To change a group name, the user will click the **Current Group** drop-down, click on the name to be edited, and then click **Edit** group. When the **Edit a group** dialog box opens, the user will enter the new name in the **Name** text box and then click **Submit**.

To delete a group, a staff user will click the **Current Group** drop-down, click on the group to be deleted, and then click **Delete Group**.

Admin Rule Profiles page

The **Admin Rule Profiles** page is where AMC staff users will go to create, configure, and revise Admin Rule Profiles. These Admin Rule Profiles are essentially collections of parameters that orders will be compared against. After rule profiles have been created and configured, they can be assigned and/or used to provide visibility to a staff user from their dashboard into their orders.

When the relevant details of an order match the conditions contained in an Admin Rule Profile, then staff users who have been assigned the rule profile will be able to view the order in their dashboard, assign themselves the order, or be assigned the order automatically, depending on how the Admin Rule Profile is configured and the way that the AMC would like their workflow carried out.

Admin Rule Profiles can be configured from the **Admin Rule Profiles** page, accessible by clicking **Admin Rule Profiles** in the **Staff** tab menu. The profiles are configured in the configuration table located at the bottom of the page. Users will also be able to view the parameters for already-configured Admin Rule Profiles in this table. To view a specific Admin Rule Profile, a user will click the **Profile Name** box at the top of the **Admin Rule Profiles** page, and select the rule profile from the **Profile Name** list.

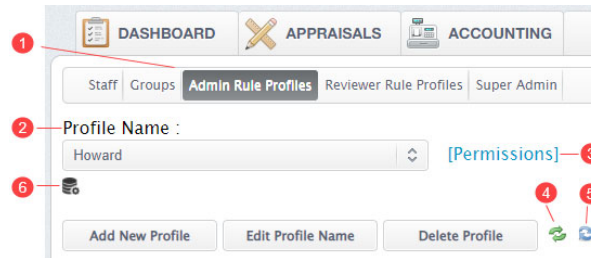
All of the criteria that have been established for an Admin Rule Profile will display through this configuration table. Staff users can modify parameters associated with the Admin Rule Profile in the columns of the table by clicking on the blue text next to the parameters they want to modify. To delete any rule profile parameter from the table, a staff user will click **[D]**.

Parameters can be set for any Admin Rule Profile by **Client, Location, Process Status, Jobtype**, and/or **Paid Status**. AMCs can choose to set parameters in some or all of these categories, and the Admin Rule Profile will filter orders based on only those parameters that have been set. Specific details regarding useful ways that Admin Rule Profiles can be applied, the parameters on which the profiles are based, and the procedures for applying and managing Admin Rule Profiles follow below.

ADMIN RULE PROFILE NAVIGATIONAL DETAILS

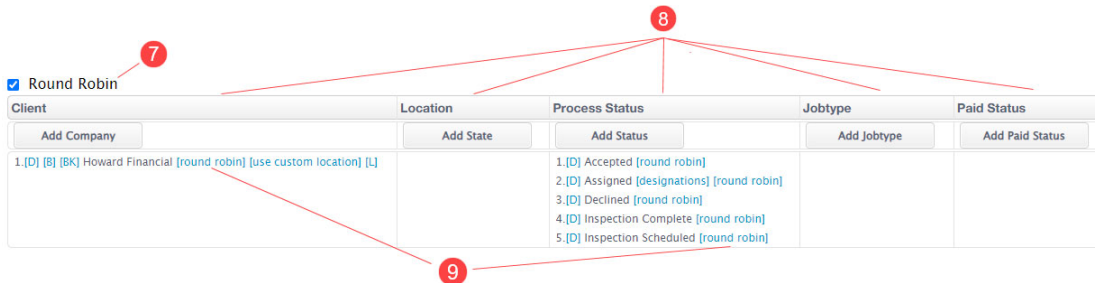
1. The **Admin Rule Profiles** button offers AMCs access to their Admin Rule Profile configuration tables and all the controls for configuring and managing Admin Rule Profiles.
2. The **Profile Name** list is where a user will choose from the Admin Rule Profiles saved to a platform-version.
3. The **Permissions** setting control is where a user will go to set permissions that will make an Admin Rule Profile accessible to selected staff users on a view-only basis.
4. The **Refresh Assigned** icon is what a user will click if they have edited parameters of an Admin Rule Profile that is configured for Round Robin, and they want Appraisal Scope to change assignment of any orders that are impacted by the changes. Clicking the icon will only make changes to orders for which an AMC staff user is assigned.
5. The **Refresh All Orders** icon is what a user will click if they have edited parameters of an Admin Rule Profile with mixed Round Robin and Monitor Only configurations, or one that's configured Monitor Only, and they want Appraisal Scope to refresh the orders so that the Admin Rule Profile configuration changes will be reflected. Clicking the icon will make changes to all orders, whether an AMC staff user is assigned to the order or not.
Please Note: Mass changes using the **Refresh All Orders** icon can take some time to complete. We recommend doing mass changes after business hours.
6. The **Admin Rule Profile Log** icon is what a user will click if they want to see details on changes made to a profile, such as the type of change, the staff user responsible for the change, and the date the change was made.

Figure 2.1. Admin Rule Profile platform interface diagram 1.



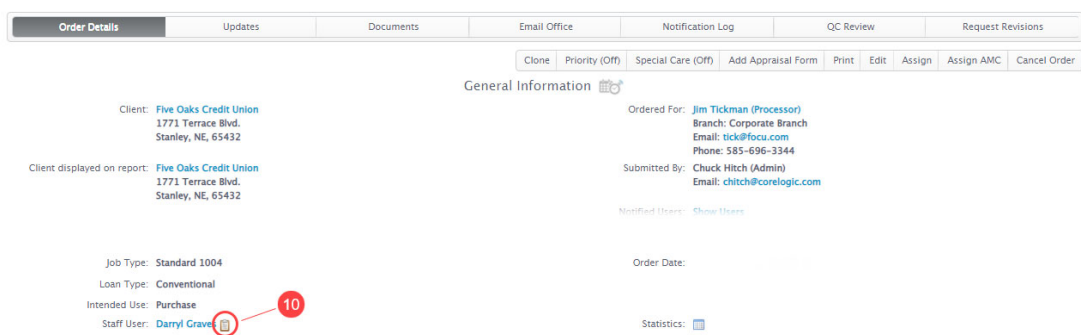
7. The **Round Robin** check box is what a staff user will select to configure an Admin Rule Profile to assign orders by round robin assignment. When the check box is empty, the Admin Rule Profile is in a **Monitor Only** configuration.
8. The **Configuration Table** consists of columns that correspond to the five categories of parameter. This is where a user will configure or edit an Admin Rule Profile.
9. The **[round robin]** control setting is a toggle control. A staff user will click this setting if they are configuring the Admin Rule Profile on a parameter by parameter basis and they want certain parameters to trigger a Monitor Only configuration. When this control setting is clicked, the text display changes to say **[monitor only]**, signifying that a given parameter is in a **[monitor only]** setting.

Figure 2.2. Admin Rule Profile platform interface diagram 2.



10. The **Admin Rule Profile Assignment Logs** dialog box is accessible on an order-by-order basis. The **Staff User** field, visible next to the icon, will list the user who is assigned an order at a given time. A user will click the **Clipboard** icon to open the dialog box, and the historic workflow details attached to that order will be visible from this box.

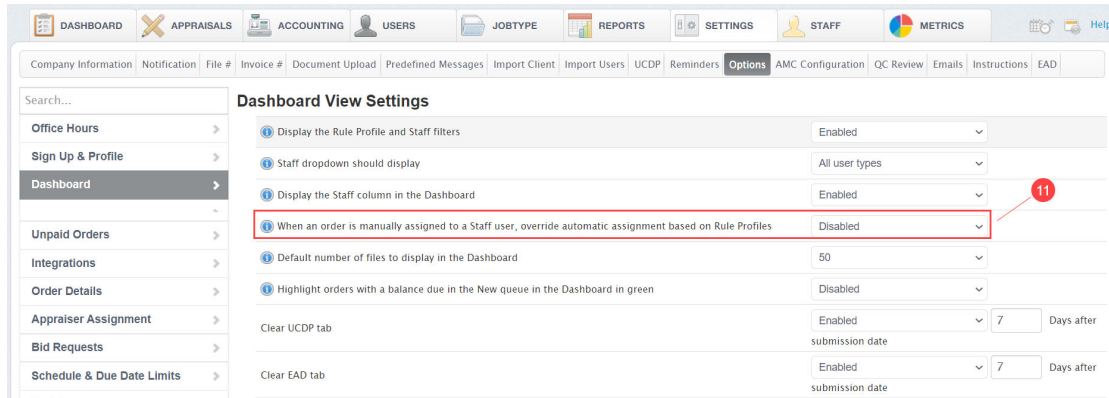
Figure 2.3. Detail of Order Details page with Admin Rule Profile Assignment Logs icon highlighted.



This functionality is good for users who want to investigate the Admin Rule Profile-generated assignment history of orders in Appraisal Scope. To reach the **Admin Rule Profile Assignment Logs** dialog box from a user Dashboard, click the **File#** or **Borrower Name** associated with the order. When the **Order Details** page opens, click the **Clipboard** icon to the right of the **Staff User** field.

The global **Dashboard View Settings** entry highlighted here will determine whether manually assigning an order to a staff user will override the Round Robin assignment rules placed on that profile. When this setting is **Enabled**, an order that has been assigned by round robin process can be manually reassigned to a different staff user, and this action will override any Admin Rule Profile logic that could impact the specific order.

Figure 2.4. Detail of Settings > Options page with manual override Dashboard setting highlighted.



ADMIN RULE PROFILES CONCEPTS AND APPLICATIONS

The following sections are intended to help AMCs better understand the variety of ways that Admin Rule Profiles can be applied.

Round Robin assignment

The Round Robin assignment functionality for Admin Rule Profiles offers AMCs the ability to configure their platform-version to automatically assign orders to a staff user when an Admin Rule Profile is triggered.

Round Robin assignment is set by selecting the **Round Robin** check box, found just above an **Admin Rule Profile** configuration table. Setting Round Robin assignment in this way provides a straightforward application, whereby a round robin process will be applied to assign orders to Admin Rule Profile assignees for every order that triggers the Rule Profile.

To illustrate how Round Robin assignment works, let's consider the following configuration table:

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
1.[D].[B].[BK] JTM Loans Plus [round robin] [use location rule]				
2.[D].[B].[BK] Offshore Bank [round robin] [use location rule]				

Note that the **Round Robin** check box has been selected. This configuration means that the AMC intends for Round Robin assignment to be applied to any orders that trigger the Admin Rule Profile. To round out our scenario, note that **Client** parameters have been set to apply to the Admin Rule Profile, and let's imagine that the rule profile has been assigned to three AMC staff users.

Under this configuration, Appraisal Scope will automatically assign staff users to orders placed by *JTM Loans Plus* or *Offshore Bank* via a round robin process. Now let's imagine that *JTM Loans Plus* has placed two orders, and *Offshore Bank* has placed one.

Of the three users who have been assigned the Admin Rule Profile, Staff User 1 will be assigned to the first order that was placed, Staff User 2 will be assigned to the next order that is placed, and Staff User 3 will be assigned to the third.

Because three staff users have been assigned the Admin Rule Profile, the round robin process dictates that the cycle will begin again when another order is placed, either by *JTM Loans Plus* or *Offshore Bank*. Staff User 1, then, would be the recipient of this fourth order. Appraisal Scope will continue assigning in this circular fashion for orders placed by either *JTM Loans Plus* or *Offshore Bank* for as long as the Admin Rule Profile is controlled by the Round Robin configuration.

To summarize, the Round Robin assignment functionality for Admin Rule Profiles can be used to automatically assign orders to staff users that have been assigned an Admin Rule Profile. Multiple parameters can be set in any category, and a variety of parameters can be set across categories. The Admin Rule Profile can be assigned to as many staff users as an AMC chooses, but the process behind how Round Robin configuration assigns orders will work the same regardless.

Monitor Only configuration

The Monitor Only functionality in Appraisal Scope offers AMCs an alternative to Round Robin assignment when creating Admin Rule Profiles. Generally speaking, any Admin Rule Profile that hasn't been configured to apply Round Robin assignment by selecting the **Round Robin** check box will be in a Monitor Only configuration.

An Admin Rule Profile configured as Monitor Only will not automatically assign an order to the staff users who are assigned to that Rule Profile. In this way, a Monitor Only rule profile can act as a filter for staff users who have been assigned to the rule profile. It gives the staff users a way to focus on the orders that trigger the rule profile without having to pick them out from among other orders that would be visible from their dashboard view.

Also, staff users assigned to the Monitor Only rule profile will need to decide among themselves which staff user should be assigned an order, and then manually assign the staff user to the order, *unless there is also a Round Robin profile with parameters that cover the order*. If the order falls within the parameters of an existing Round Robin rule profile, a staff user will be automatically assigned based on the Round Robin profile.

Note: An expanded discussion of the way Admin Rule Profiles can be used by AMCs to help staff users manage orders is available in this User Guide. Go to the [Applying Admin Rule Profiles to staff management](#) section for more information.

We can use a variation on the same scenario we used in the *Round Robin assignment* section to illustrate how a Monitor Only configuration will function differently from a Round Robin configuration. Let's consider the following configuration table:

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
1.[D] [B] [BK] JTM Loans Plus [use location rule]				
2.[D] [B] [BK] Offshore Bank [use location rule]				

In this case, note that the **Round Robin** check box is clear. The AMC intends here that the staff users who have been assigned this Admin Rule Profile will be able to view the orders that trigger the profile and that they'll assign the orders among themselves. Note also that the **Client** parameters set to apply to this Admin Rule Profile feature the same companies as our example from the previous section, and let's imagine that once again the profile has been assigned to three AMC staff users.

Each order that *JTM Loans Plus* or *Offshore Bank* places will trigger this Admin Rule Profile, but what Appraisal Scope does with these orders as a result will be different from the Round Robin configuration scenario. In this case, the three Admin Rule Profile assignees will be able to view the orders on their dashboards, but the orders won't be assigned to them. These users will be responsible for how the orders are assigned to an AMC staff user, or if orders are left unassigned.

The scenarios described in this section and in the *Round Robin assignment* section are very simple, intended to illustrate the basic difference between Round Robin configurations and Monitor Only configurations. AMC's can, however, configure Admin Rule Profiles to take advantage of both the Round Robin and Monitor Only functionalities to manage their staff. In order to take advantage of this more adaptable configurability, AMC users will need to know something about configuring the Round Robin and Monitor Only settings on a parameter-by-parameter basis.

Parameters explained

Prefatory usage note for configuring parameters

Before parameters are discussed more generally, we'd like to point out a configuration detail to keep in mind when setting parameters in a configuration table. Leaving a column blank in a configuration table means that, as far as the associated column header/category is concerned, the Admin Rule Profile will be inclusive of all orders. Setting a specific parameter or parameters, then, is essentially specifying what, in a given category, the Admin Rule Profile will look for, while excluding all other possible choices in that category.

For instance, if a staff user is configuring an Admin Rule Profile and leaves the **Location**, **Jobtype**, and **Paid Status** columns of the configuration table blank, then the rule profile will consider all possible locations, all possible jobtypes that an AMC has set up in their platform-version, and all payment statuses. There is no need for a user to specify any parameters in these columns, unless they want the Admin Rule Profile to only consider the parameters specified.

In another example, if the **Client** column is left blank, then the rule profile will consider all possible client companies in an AMC's platform-version. Entering a particular client in this column, however, will eliminate all other clients when the Admin Rule Profile is considering whether an order meets the conditions that will trigger it.

Parameters continued

The example scenarios provided to this point have been based on a simple **Client** parameter configuration in order to illustrate how Round Robin and Monitor Only configurations work in general. It should be noted at this point that the same underlying logic that causes the **Client** parameter to trigger these hypothetical Admin Rule Profiles in the first place also extends to other parameters as well, and this concept is what will be discussed in this section.

One essential thing to remember when configuring Admin Rule Profiles is that the parameters are what cause the Admin Rule Profile to do something with an order. In order for the Admin Rule Profile to do *anything* with an order, the order must meet the requirements of an entire parameter sequence. To understand what this means, consider the following configuration table:

Round Robin					
Client	Location	Process Status	Jobtype	Paid Status	
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status	
1. [D] [B] [BK] JTM Loans Plus [round robin] [use location rule]	1. [D] [C] Michigan [round robin]				
2. [D] [B] [BK] Offshore Bank [round robin] [use location rule]	2. [D] [C] Oklahoma [round robin]				

We can set aside for the moment the setting controls **[B]** and **[BK]** in the **Client** column and **[D]** and **[C]** in the **Location** column and assume that the parameter sequence for *JTM Loans Plus* will run as follows: an order placed by *JTM Loans Plus* will automatically assign by Round Robin to an Admin Rule Profile assignee *if and only if* one of the two parameters that appear in the **Location** column is matched.

To explain what this means with real-world scenarios: this Admin Rule Profile dictates that an order placed by *JTM Loans Plus* for a property in Michigan will assign by Round Robin, and/or an order placed by *JTM Loans Plus* for a property in Oklahoma will assign by Round Robin. An order placed by *JTM Loans Plus* for a property in any state other than Michigan or Oklahoma will not meet the conditions of the parameter sequence and so will not trigger the Admin Rule Profile.

The same principle holds true for *Offshore Bank*: any order they place must also match one of the two parameters set in the **Location** column in order to satisfy the parameter sequence and trigger the Admin Rule Profile.

Now let's consider the following configuration table:

Round Robin				
Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
1.[D] [B] [BK] JTM Loans Plus [round robin] [use location rule]	1.[D] [C] Michigan [round robin]		1.[D] 1004 URAR with 1004D [round robin]	
2.[D] [B] [BK] Offshore Bank [round robin] [use location rule]	2.[D] [C] Oklahoma [round robin]			

Here we have three conditions that have to be met in order to satisfy a parameter sequence and trigger the Admin Rule Profile: an order placed by *JTM Loans Plus* will automatically assign by Round Robin to an Admin Rule Profile assignee *if and only if* one of the two parameters that appear in the **Location** column is matched and the parameter set in the **Jobtype** column is also matched.

In other words, an order for a *1004 URAR with 1004D* placed by *JTM Loans Plus* for a property in Michigan or Oklahoma will assign by Round Robin. The same will happen if *Offshore Bank* places an order for this type appraisal in one or both of these states. However, an order placed by either company for this type appraisal in any other state will not trigger the Admin Rule Profile. Likewise, an order placed for a different type appraisal will not trigger the Admin Rule Profile, regardless of whether it's for a property in Oklahoma or Michigan.

To further clarify how parameters trigger Admin Rule Profiles, we should consider the following configuration table:

Round Robin				
Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
	1.[D] [C] Michigan [round robin]			
	2.[D] [C] Oklahoma [round robin]			
	3.[D] [C] Texas [round robin]			

Here we have an Admin Rule Profile configured to assign orders only by location. In this scenario, there is no client information that needs to be considered. Any orders placed by any of an AMC's clients for properties in Michigan, Oklahoma, or Texas will trigger this Admin Rule Profile.

Note: For AMCs utilizing multiple Admin Rule Profiles, those Rule Profiles configured with broad parameters, such as the above example illustrates, carry a higher risk of conflict with existing Admin Rule Profile configurations. Please see the [Conflicting configurations](#) section for more details.

To summarize, parameter sequences represent the triggering mechanism for an Admin Rule Profile. The individual parameters that make up a sequence will come from the columns of the configuration table.

Users may note the blue text elements associated with each individual parameter. These are clickable controls that allow for configuration on a parameter-by-parameter basis within an Admin Rule Profile.

The **[round robin]** toggle control is covered in the following section. Information regarding the other controls, how they influence parameters, and what this means for Admin Rule Profile customization is provided in the [Admin Rule Profiles configuration procedures](#) section.

Note: Configurations using **Process Status** parameters have not been included in the examples above in order to make the parameter sequence examples as simple as possible. The **Process Status** parameters offer good solutions for AMCs that want to assign their staff users to orders at different points in the order workflow. Please see the [Applying Admin Rule Profiles to staff management](#) section for more details.

Mixed configurations: Round Robin and Monitor Only settings

Monitor Only configuration is one of the elements available to be set on a parameter-by-parameter basis in Admin Rule Profiles. This availability allows an AMC to use both Round Robin assignment and Monitor Only

configuration within the same Admin Rule Profile. In order for both settings to be used, the **Round Robin** check box just above the configuration table must be selected.

When Round Robin assignment is turned on for an Admin Rule Profile, a blue toggle setting that reads **[round robin]** will appear to the right of each individual parameter in the configuration table. When a staff user clicks **[round robin]** in any given instance where it appears alongside a parameter, this toggle control will change to read **[monitor only]**.

This action changes the setting of any single parameter from Round Robin assignment to Monitor Only. What this means is that when an order is placed that triggers the Admin Rule Profile by virtue of matching the specific parameter that has been changed to Monitor Only, Appraisal Scope won't automatically assign the order.

In this case, the Admin Rule Profile assignees will be able to view the order on their dashboards, but these users will be responsible for deciding how the order is assigned. All other parameters having remained in a Round Robin configuration, any order that triggers the Admin Rule Profile by matching any of these other parameters will still be assigned automatically by the round robin process.

Let's consider the following configuration table:

<input checked="" type="checkbox"/> Round Robin				
Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[ID] [B] [BK] JTM Loans Plus [round robin] <small>[use location rule]</small>	1.[ID] [C] Michigan [round robin]			
2.[ID] [B] [BK] Offshore Bank [monitor only] <small>[use location rule]</small>	2.[ID] [C] Oklahoma [round robin]			

Note that the **[round robin]** toggle control corresponding to the **Client** parameter *Offshore Bank* has been clicked so that **[monitor only]** now displays. By this configuration table, an order placed by *JTM Loans Plus* for a property in either Michigan or Oklahoma will trigger the Admin Rule Profile. The assignees of this Rule Profile will be assigned that order automatically by round robin process.

On the other hand, an order placed by *Offshore Bank* in either Michigan or Oklahoma will also trigger the Admin Rule Profile, but the assignees of this Rule Profile will not be automatically assigned the order. Instead, they will be able to view the order on their dashboards, but they will be responsible for assigning the order among themselves.

Admin Rule Profile configurations that utilize both Round Robin assignment and Monitor Only configurations can be used by AMCs in a variety of circumstances. Round Robin assignment is a good option, for instance, in a scenario where a short turnaround time is critical for the types of orders that will match a particular parameter.

For example, let's consider once again the following Admin Rule Profile:

<input checked="" type="checkbox"/> Round Robin				
Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[ID] [B] [BK] JTM Loans Plus [round robin] <small>[use location rule]</small>	1.[ID] [C] Michigan [round robin]			
2.[ID] [B] [BK] Offshore Bank [monitor only] <small>[use location rule]</small>	2.[ID] [C] Oklahoma [round robin]			

We can imagine that of these two clients, *JTM Loans Plus* is particularly important to the AMC due to their high order volume. *Offshore Bank*, on the other hand, is a smaller lender that produces orders less frequently.

In the case of *JTM Loans Plus*, the AMC believes that it's necessary for their orders to be assigned immediately. As a consequence, a staff user has set Round Robin assignment to handle orders from this client.

In the case of *Offshore Bank*, though, the AMC wants all of its Admin Rule Profile assignees to be able to view all orders and control who is assigned to them. This way, the staff users can account for who among them has the lightest workload.

Conflicting configurations

Conflicting configurations is a term that refers to rule profiles that have been configured with overlapping conditions. AMCs should be aware that these conflicting configurations will cause their platform-version to behave in ways that are inconsistent with what they've intended.

AMC staff users can inadvertently create conflicting configurations when they set up a new Admin Rule Profile. This usually happens when a different Admin Rule Profile already exists that is using a common parameter in a conflicting way.

AMCs can prevent making conflicting configurations by tracking which parameters are being used in each Admin Rule Profile and how they're being used. They should also monitor the objectives that each Admin Rule Profile was created to carry out and verify that they're still working in the way they were intended.

Conflicting Configuration Scenario 1.

To illustrate what conflicting configurations look like and how they might occur, let's construct a scenario. For this scenario, our AMC is setting up Admin Rule Profiles to manage orders placed by *Five Oaks Credit Union*.

They've created the first Admin Rule Profile as a way to manage all orders placed by *Five Oaks Credit Union* in Oklahoma and Texas. They will assign this rule profile to a group of staff users who will be responsible for all orders.

They've called this Admin Rule Profile **Five Oaks Admins**; see screenshot below for a view of this rule profile.

Profile Name : Five Oaks Admins [Permissions]

Buttons: Add New Profile, Edit Profile Name, Delete Profile

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
1.[D] [B] [BK] Five Oaks Credit Union [round robin] [use location rule]	1.[D] [C] Oklahoma [round robin] 2.[D] [C] Texas [round robin]			

The AMC has also created a second Admin Rule Profile, which they intend to assign to a user who will serve in a management capacity for orders placed by this lender. The AMC wants this staff user to concentrate on monitoring the progress of all orders that *Five Oaks Credit Union* places.

They've called this Admin Rule Profile **Five Oaks Management**; see screenshot below for a view of this rule profile.

Profile Name : Five Oaks Management [Permissions]

Buttons: Add New Profile, Edit Profile Name, Delete Profile

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
Add Company	Add State	Add Status	Add Jobtype	Add Paid Status
1.[D] [B] [BK] Five Oaks Credit Union [round robin] [use location rule]				

Right away, we can see that overlapping conditions have been set up between these two rule profiles (as previously mentioned, for columns that are blank all possibilities are implied). These rule profiles technically overlap at the **Client** parameter, and the reason they're conflicting configurations in this case is because they're both set up to assign automatically by Round Robin.

The way that the AMC intends this to work and believes it will work is that all orders placed by *Five Oaks Credit Union* for properties in the states of Oklahoma or Texas will be automatically assigned by a round robin process to staff users who are assigned the **Five Oaks Admins** rule profile.

Then, the staff user assigned the **Five Oaks Management** rule profile will be able to monitor all orders placed by the credit union, not just for properties in Oklahoma or Texas, but for all regions that *Five Oaks* covers. There is a conflicting configuration here, however, that will prevent these profiles from carrying out the tasks that are expected of them.

Because the **Round Robin** check box has been selected in both of the screenshot examples, one of two things could happen. If the **Five Oaks Admins** profile was created and assigned first, then the orders will carry on assigning among those staff users who have been assigned this profile. The staff user who is assigned the **Five Oaks Management** profile will not ever see these orders to monitor them.

If, however, the **Five Oaks Management** rule profile was created and assigned first, then the orders will be assigned to the staff user assigned this profile. The fact that this profile was created and assigned first means that it will supersede the **Five Oaks Admins** rule profile and so the staff users assigned **Five Oaks Admins** will never be assigned any orders.

Either way, in this scenario, the Appraisal Scope platform-version will not be assigning orders among staff in the way that the AMC intends it to. The reason is that because the **Round Robin** check box has been selected in both cases, the overlapping **Client** parameter, *Five Oaks Credit Union*, is in conflict. In order to fix this conflicting configuration and bring the Admin Rule Profiles into alignment with the AMCs intent, a staff user would just need to clear the **Round Robin** check box associated with the **Five Oaks Management** rule profile.

An alternative resolution of the conflict in this scenario would be to give what is essentially view-only permission to allow the user tasked with monitoring order statuses access to orders that trigger the **Five Oaks Admins** rule profile. A staff user with this permission would be able to click the **Rule Profile** dropdown and select **Five Oaks Admins** from the list to filter their dashboard. This would allow them to see only and all of the orders that trigger the **Five Oaks Admins** rule profile.

Conflicting Configuration Scenario 2.

For our second scenario, our AMC has decided to take a different approach to how they manage orders placed by another client, *National Trade Bank*. They will set up three different Admin Rule Profiles, and they will use the **Process Status** parameters to separate responsibility for the orders into segments of the workflow.

The AMC has broken their staff users up into three groups, each group corresponding to an Admin Rule Profile. The first group will oversee order intake tasks, the second will oversee inspection scheduling tasks, and the third will oversee client delivery tasks. Below is the first rule profile.

Profile Name :
 National Trade Bank Intake [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [B] [BK] National Trade Bank [round robin] [use location rule]		1. [D] Accepted [monitor only] 2. [D] Accepted with Conditions [round robin] 3. [D] Assigned [designations] [round robin] 4. [D] New [round robin] 5. [D] Request for Bid [round robin]		

All new orders placed by *National Trade Bank* will assign to staff users who are working under the **National Trade Bank Intake** profile. This Admin Rule Profile will be used by the group overseeing intake tasks.

As the orders progress through the opening stages of the workflow, they will remain assigned to the same user. When they reach the **Accepted** status, though, the **National Trade Bank Intake** rule profile will de-assign the staff user and the next Admin Rule Profile will kick in to re-assign the order to a different user.

Although the order will no longer be assigned to the original staff user, it will still be visible from the dashboard view of users assigned to the **National Trade Bank Intake** rule profile until the process status associated with the order progresses beyond **Accepted**. This way, the period of transition from the first Admin Rule Profile to the second can be monitored.

Now let's consider the second rule profile below (see following screenshot).

In this scenario, we can see that the **National Trade Bank Scheduling** rule profile will be used by the group overseeing scheduling tasks. When one of the orders placed by *National Trade Bank* reaches the workflow status **Accepted** or **Accepted with Conditions**, **National Trade Bank Scheduling** will kick in and assign the order to one of the staff users responsible for overseeing the scheduling tasks.

Profile Name :
 National Trade Bank Scheduling [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[D] [B] [BK] National Trade Bank [round robin] (use location rule)		1.[D] Accepted [round robin] 2.[D] Inspection Complete [round robin] 3.[D] Inspection Scheduled [round robin] 4.[D] Ready for Review [rev type] [round robin]		

The AMC intends with this Admin Rule Profile that the staff user who is assigned an order continue to be assigned until the order status progresses beyond **Inspection Complete**, at which point a third Admin Rule Profile will kick in and re-assign the order based on its configuration.

Note that in **National Trade Bank Scheduling**, the AMC has also included the **Ready for Review** status. As was the case with our **National Trade Bank Intake** group, the AMC wants orders to be visible from the dashboard view of users assigned to the scheduling rule profile. However, the **Process Status** parameter has not been configured appropriately to meet this object, and an overlapping parameter has been introduced.

To see how this overlapping parameter will cause conflicting configurations, let's consider the third rule profile below.

Profile Name :
 National Trade Bank Client Delivery [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[D] [B] [BK] National Trade Bank [round robin] (use location rule)		1.[D] Ready for Review [rev type] [round robin] 2.[D] Reviewed [rev type] [round robin] 3.[D] Revision Received [rev type] [round robin] 4.[D] Revision Sent [rev type] [round robin] 5.[D] UW Condition [round robin]		



The **National Trade Bank Client Delivery** rule profile will be used by the group that oversees delivery of the final appraisal to the client. The AMC intends that the staff users assigned this profile will be assigned orders placed by *National Trade Bank* that have reached the **Ready for Review** status. As we've seen, however, the AMC has introduced an overlapping parameter with the **Ready for Review** status.

Because the **Ready for Review** parameter of the **National Trade Bank Scheduling** rule profile is set to **[round robin]**, this rule profile will be effectively blocking the **National Trade Bank Client Delivery** profile, which is also configured for Round Robin at the **Ready for Review** parameter, from performing as it should. To fix this situation, a staff user would need to modify the **National Trade Bank Scheduling** configuration table by

going to **Staff > Admin Rule Profiles**, choosing **National Trade Bank Scheduling** from the **Profile name** drop-down list, finding the **Process Status** parameter **Ready for Review**, and clicking **[round robin]** to the right of the parameter.

This action will switch the toggle control next to **Ready for Review** to read **[monitor only]**. This rule profile will now de-assign the order from the user who'd been managing it, allowing the **National Trade Bank Client Delivery** rule profile to re-assign the order. A correctly configured **National Trade Bank Scheduling** rule profile would look like the following:

Profile Name :
 National Trade Bank Scheduling [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[D] [R] [BK] National Trade Bank [round robin] [use location rule]		1.[D] Accepted [round robin] 2.[D] Inspection Complete [round robin] 3.[D] Inspection Scheduled [round robin] 4.[D] Ready for Review [rev type] [monitor only]		

Applying Admin Rule Profiles to staff management

Because order details are used as parameters to construct Admin Rule Profiles, these rule profiles lend themselves to a number of management applications. An AMC can use rule profiles to help sort through which of the tasks their staff users should be taking ownership of, and to provide dashboard filters that can help staff users to view only the information they need.

There are three conceptual areas of focus that can help an AMC to better relate the abstract Admin Rule Profiles to real-world business objectives:

- *Understand the relationship between staff users and Admin Rule Profiles.* Admin Rule Profiles can be assigned to staff users, or they can be used to give staff users a view into what's happening with certain orders. When Admin Rule Profiles are assigned, they have the effect of communicating an AMC's expectations to its staff members. When users are given view-only permission, the rule profiles act more as a filter, limiting what a user will see on their dashboard.
- *Understand the relationship between a staff user's order responsibilities and the Appraisal Scope order workflow.* In some cases, a staff user might need to be assigned an order as soon as it's placed. In other cases, an AMC might want a staff user to take over managing an order when it's at a specific point in the order workflow. The parameters in the **Process Status** column of the configuration table allow specific workflow management responsibilities to be automated.
- *Understand how Admin Rule Profile parameters relate to order details.* The **Client**, **Location**, and **Jobtype** columns of an Admin Rule Profile configuration table reflect the types of details each order will carry. This allows AMCs to configure task-specific rule profiles using order details as the parameters, and to automatically assign staff users responsibility for orders based on these parameters.

The scenarios used to this point throughout this section to illustrate the various concepts discussed reflect some ways that AMCs will typically make use of Admin Rule Profiles. The following sections will make these uses more explicit.

Admin Rule Profile Staff Management Scenario 1.: Automatically assigning orders to staff based on order details

In this scenario, our AMC has a client, *TPCS*, who places orders for properties in Alabama and Mississippi. The AMC has decided that they want to make two staff users responsible for all of the orders that *TPCS* places, but they want one staff member to be responsible for orders on properties in Alabama, and one staff member to be responsible for orders on properties in Mississippi.

They configure the following Admin Rule Profiles:

Profile Name :
 TPCS Profile 1 [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[D] [B] [BK] TPCS [monitor only] [use location rule]	1.[D] [C] Alabama [round robin]			

Profile Name :
 TPCS Profile 2 [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1.[D] [B] [BK] TPCS [round robin] [use location rule]	1.[D] [C] Mississippi [round robin]			

A staff user has configured each of these rule profiles to assign the orders automatically using Round Robin assignment. The AMC will now assign **TPCS Profile 1** to the user they've designated to handle Alabama property orders, and **TPCS Profile 2** to the user they've designated to handle Mississippi property orders.

This scenario represents a simple case. Admin Rule Profiles will generally include more and varied parameters to capture more order details. This scenario is intended to illustrate how AMCs can connect Admin Rule Profiles with the order details of any order through parameter configurations, configure Round Robin assignment through the configuration table, and then assign these rule profiles to staff users to help them efficiently take ownership of their order-related tasks.

Admin Rule Profile Staff Management Scenario 2.: Automatically assigning orders to staff based on process status

For this second scenario, we'll revisit the administrative assignment strategy that we discussed under *Conflicting Configuration Scenario 2*, but this time without the conflicting configuration. In our scenario, the AMC wants to manage all orders placed by *National Trade Bank* with just one group of staff users. They want to divide up the responsibilities for tasks among members of this group by workflow status. They're going to create three different Admin Rule Profiles.

The AMC has designated that the first group of users will oversee order intake tasks. The following screenshot represents the Admin Rule Profile configuration created for this group of staff users:

Profile Name :
 National Trade Bank Intake [Permissions]

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [B] [BK] National Trade Bank [round robin] [use location rule]		1. [D] Accepted [monitor only] 2. [D] Accepted with Conditions [round robin] 3. [D] Assigned [designations] [round robin] 4. [D] New [round robin] 5. [D] Request for Bid [round robin]		

The **National Trade Bank Intake** profile is configured so that all new orders placed by *National Trade Bank* will assign to staff users assigned the profile. Once the order is assigned to a single user by round robin, the same user will own the order until an appraiser has accepted assignment of the appraisal job. When the order reaches **Accepted**, the user who had maintained ownership is de-assigned. At the same time, the order becomes visible to all AMC staff users responsible for intake tasks until the workflow status progresses beyond **Accepted**.

At this point, Appraisal Scope has re-assigned that same order to another staff user. The AMC has designated a second group of staff users to oversee scheduling tasks. The following screenshot represents the Admin Rule Profile configuration created for this group of staff users:

Profile Name :
 National Trade Bank Scheduling [Permissions]



Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [B] [BK] National Trade Bank [round robin] [use location rule]		1. [D] Accepted [round robin] 2. [D] Inspection Complete [round robin] 3. [D] Inspection Scheduled [round robin] 4. [D] Ready for Review [rev type] [round robin]		

The **National Trade Bank Scheduling** profile is configured so that all orders placed by *National Trade Bank* that have reached the **Accepted** status will assign to staff users assigned the profile. Once an **Accepted** order is assigned to a single user by round robin, the same user will own the order until an appraisal is ready for review. When the order reaches **Ready for Review**, the user who had maintained ownership is de-assigned. At the same time, the order becomes visible to all AMC staff users responsible for scheduling tasks until the workflow status progresses beyond **Ready for Review**.

At this point, Appraisal Scope has once again re-assigned that same order to another staff user. The AMC has designated a third group of staff users to oversee client delivery tasks. The following screenshot represents the Admin Rule Profile configuration created for this group of users:

Profile Name :
National Trade Bank Client Delivery [Permissions]

Add New Profile Edit Profile Name Delete Profile  

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [R] [BK] National Trade Bank [round robin] [use location rule]		1. [D] Ready for Review [rev type] [round robin] 2. [D] Reviewed [rev type] [round robin] 3. [D] Revision Received [rev type] [round robin] 4. [D] Revision Sent [rev type] [round robin] 5. [D] UW Condition [round robin]		



The **National Trade Bank Client Delivery** profile is configured so that all orders placed by *National Trade Bank* that have reached the **Inspection Complete** status will assign to staff users assigned the profile. Once an **Inspection Complete** order is assigned to a single staff user by round robin, the same user will own the order until the client receives the report.

Admin Rule Profile Staff Management Scenario 3.: Applying Admin Rule Profiles as dashboard filters

For our third scenario, we want to point out the filtering functionality that's offered by Admin Rule Profiles. To illustrate how this works, we can imagine that an AMC would like to provide a staff user with what are essentially viewing privileges for orders that a particular Admin Rule Profile passes along. A staff user with the necessary privileges can set permissions for the user who will oversee these orders.

Let's revisit the following screenshot to see how this can work:

Profile Name :
TPCS Profile 1 [Permissions]

Add New Profile Edit Profile Name Delete Profile  

Round Robin

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [R] [BK] TPCS [monitor only] [enable all states]	1. [D] [C] Alabama [round robin]			

In this case, our AMC wants to provide viewing privileges into orders that trigger **TPCS Profile 1**. To make this happen, a staff user will click **[Permissions]**, select the check box next to any staff users who they want to provide view-only permission to, and then click **Save**.

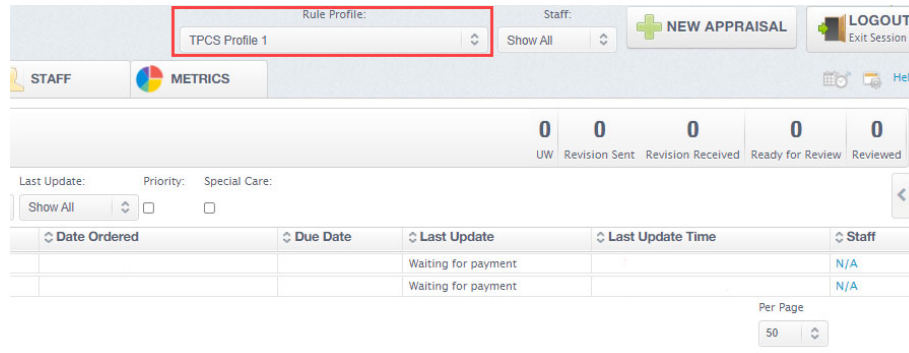
Note: The check boxes coinciding with staff users who have super-admin privileges will be grayed out because super-admin users already have viewing permission into all Admin Rule Profiles.

Our staff user now has view-only permission for **TPCS Profile 1**. This permission will allow the user to use this Admin Rule Profile as a dashboard filter. When the rule profile is used in this way, the staff user will see details of the orders that this Admin Rule Profile routes through.

The staff user can use the filtering functionality of **TPCS Profile 1** by selecting the profile from the **Rule Profile** drop-down list ([Figure 2.5](#)). When this profile has been selected, the user will see on their dashboard the staff and workflow details of only the orders that *TPCS* has placed for properties in Alabama. The details of all other orders will be excluded.

AMCs are able to take advantage of the filtering functionality by offering view-only privileges to as many Admin Rule Profiles and for as many users as they'd like. The staff user will control which filtered dashboard view they'd like to see by choosing the Admin Rule Profile from the drop-down list.

Figure 2.5. Detail of the main platform landing page with location of **Rule Profile** drop-down list highlighted.



ADMIN RULE PROFILES CONFIGURATION PROCEDURES

Adding and configuring a new Admin Rule Profile

1. To add a new Admin Rule Profile to your platform-version from the **Staff** tab, click **Admin Rule Profiles** in the **Staff** tab menu.
2. Click **Add New Profile**, enter a name for the new profile into the **New Profile Name** text box, and click **Save**.
3. Next, click the **Profile Name** box and choose the new profile that you just saved.
4. The Admin Rule Profile can be configured by **Client**, **Location**, **Process Status**, **Jobtype**, and **Paid Status**, each rule parameter occupying its own column of the **Admin Rule Profile** configuration table.

All new Admin Rule Profiles created this way will be available to assign moving forward in an AMC's platform-version. Once a rule profile is saved to a platform-version, edits and modifications can be made to the profile when it's chosen from the **Profile Name** list on the **Admin Rule Profiles** page.

An existing profile can also be deleted after it's been chosen from the **Profile Name** list by clicking **Delete Profile**, and the name of an existing profile can be changed by clicking **Edit Profile Name**, typing the new name in the **Edit Profile Name** text field, and clicking **Save**.

Configuring new Admin Rule Profile: Procedure Unit 1—Client parameters

1. To set **Client** parameters for a new Admin Rule Profile, click **Add Company** in the **Client** field of the **Admin Rule Profile** configuration table.
2. When the **Select Company** dialog box opens, select the check boxes associated with the companies you want to set as rule profile parameters. Click **Submit** when finished.
3. Proceed to the following **Client** parameter configuration procedures to set further **Client** parameters.

Configuring Client parameters—applying Client Branch parameters

Usage Note: The **Client Branch** parameter should be used in instances when an AMC wants Admin Rule Profile assignees to be limited to handling orders from selected branches of a client company.

1. To choose to narrow the **Client** parameters in this Admin Rule Profile to apply by **Branch**, click **[B]** next to the **Client** parameter that you want to modify.
2. The **Select Branch** dialog box will open with a full list of branches associated with a client.
3. Clear the check boxes associated with any of the branches that you want to exclude as part of the **Client** parameter (see the *More information on Branch and Broker settings for Client parameters* section, next page, for in-depth information on **Branch** and **Broker** settings for **Client** parameters).

4. Clicking the **Check All** and **UnCheck All** buttons will fill or clear all **Branch** check boxes in the dialog box. The **auto add new branches** check box should remain selected if a new branch should automatically be applied to the Admin Rule Profile when it's added to a client company profile.
5. Click **Submit** when finished.

Configuring Client parameters—applying Client Broker parameters

Usage Note: The **Client Broker** parameter may be used in instances when an AMC wants to single out specific entities that have a broker relationship with the client to trigger the rule profile, instances when the **Client** parameter will reflect a client company acting as Client on Report.

1. To configure the **Client** parameter to favor a specific broker relationship that a client company has, click **[BK]** next to the **Client** parameter.
2. The **Select Broker** dialog box will open with a full list of entities that have a brokering relationship with this client company.
3. Clear the check boxes associated with any of the entities you'd like to exclude as parameters in the rule profile (see the *More information on Branch and Broker settings for Client parameters* section, next page, for in-depth information on the **Branch** and **Broker** settings for **Client** parameters).
4. Clicking the **Check All** and **UnCheck All** buttons will fill or clear all **Broker** check boxes in the dialog box. The **auto add new brokers** check box should remain selected if a new broker should automatically be applied to the Admin Rule Profile when it's added in a client company profile.
5. Click **Submit** when finished.

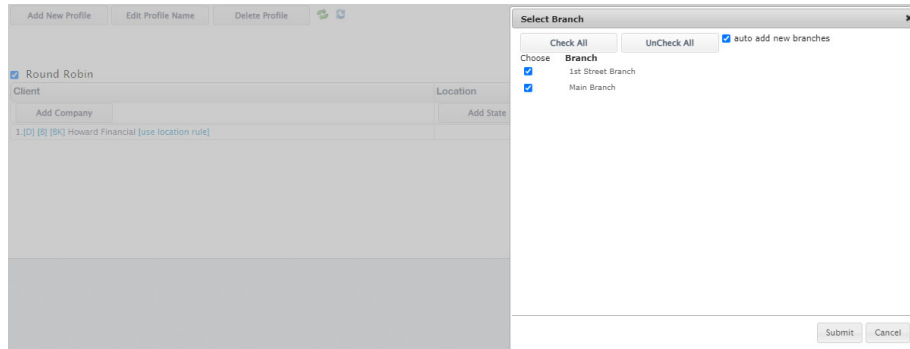
Configuring Client parameters—applying Location settings

Usage Note: Applying **Location** settings by individual **Client** parameter should be done if no parameters are to be set in the **Location** column of the Admin Rule Profile configuration table, or if a custom location setting is desired that will supersede the parameters set in the **Location** column for a particular client company.

1. If you want to apply custom location settings to a **Client** parameter, click **[use location rule]** next to the relevant **Client** parameter, and the text will change to read **[use custom location]**.
2. Then, click **[L]** next to **[use custom location]** to open the **Set Custom Location** dialog box.
3. Click **Add State** and select the check boxes associated with any states that you want to set for that specific **Client** parameter, then click **Submit**.
4. If you wish to further refine this custom location by county, click **[C]** next to the state name in the **Set Custom Location** dialog box, clear any check boxes associated with the counties that you do not want to apply within your custom location parameter, and click **Submit**.
5. When you're finished setting your custom location, click **x** to close the **Set Custom Location** dialog box and return to the **Admin Rule Profile** configuration table.
6. If you do not want to configure a specific custom location setting by a **Client** parameter but you still do not want the **Location** parameters of your Admin Rule Profile to impact your **Client** parameter, click **[use custom location]** next to the relevant **Client** parameter and the text will change to read **[enable all states]**. This will ensure that no **Location** parameters will impact whether orders trigger the rule profile.

More information on Branch and Broker settings for Client parameters

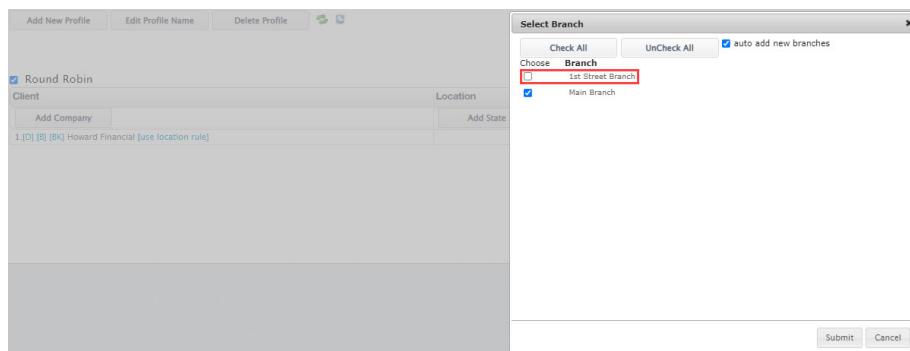
The **Branch** settings available for a **Client** parameter will reflect the number of branches that are associated with a [client company profile](#) in a platform-version. Configuring a **Client** parameter with a **Branch** setting is straightforward. Let's look at a couple of screenshots to view how this can work.



In this screenshot, we are seeing an Admin Rule Profile where **Howard Financial** has been set as a **Client** parameter. Users should note that this screenshot shows the default configuration for the **Select Branch** dialog box, meaning that all check boxes will start out as checked in the **Select Branch** dialog box. We can also see here that *Howard Financial* has two branches associated with its client company profile.

What this Admin Rule Profile currently says is that any order placed by *Howard Financial* will satisfy the parameter sequence and trigger the rule profile. In other words, the **Client** parameter will work here in the same standard way any **Client** parameter will work if no further settings are configured for it.

Now let's consider the following screenshot:

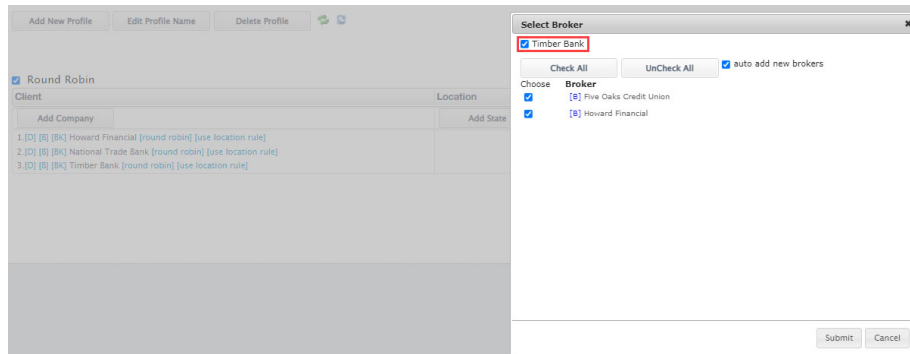


In this case, note that the staff user has cleared the **1st Street Branch** check box. What this Admin Rule Profile says is that any order placed by client users affiliated with *Howard Financial's* main branch will satisfy the parameter sequence and trigger the rule profile. Orders placed by client users affiliated with the 1st Street Branch, however, will not satisfy this parameter sequence and trigger the rule profile.

The **Broker** settings associated with a **Client** parameter are less straightforward to understand. For the sake of conceptual clarity, let's review what a broker is referring to in Appraisal Scope. A broker within the platform refers to an entity that has a brokering relationship with a client company on an AMC's platform-version. Practically speaking, the broker will place an order for an appraisal on behalf of the client company that they have the brokering relationship with, and the client company will appear on the final appraisal report as the Client on Report.

The broker concept, then, is closely tied to the Client on Report concept. Recall that the broker relationships that any client company has are established in the platform through the **Client on Report** page of the client company profile (see the [Client on Report](#) section for more information). The Client on Report refers in Appraisal Scope to the lending entity that will appear on the final appraisal report.

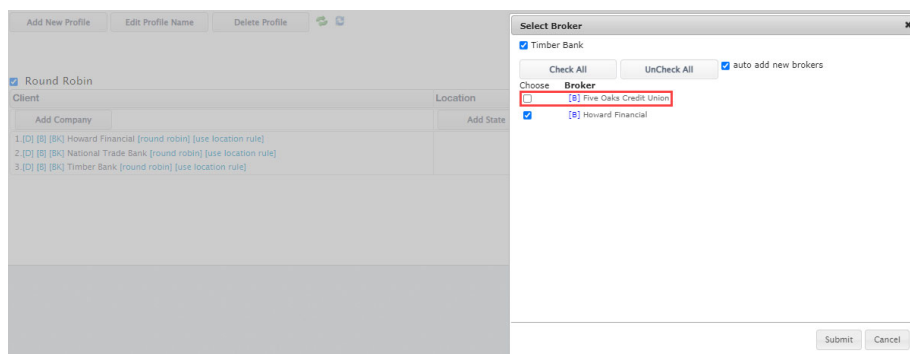
In order to see how these concepts link up in Admin Rule Profiles, let's go through some example screenshots of Admin Rule Profiles where the **Company** parameter is being further configured by broker, and let's interpret everything that the **Select Broker** dialog box is telling us about how our **Company** parameter will behave in these scenarios. Let's consider the following:



In this screenshot, we are seeing an Admin Rule Profile where **Timber Bank** has been set as a **Client** parameter. Users should note that this screenshot shows the default configuration for the **Select Broker** dialog box, meaning that all check boxes will start out as checked in the Select Broker dialog box. We can see here also that both **Five Oaks Credit Union** and **Howard Financial** have broker relationships with *Timber Bank* (see [Client on Report](#) section for more information).

What this Admin Rule Profile currently says is that any order placed by *Timber Bank* or for which *Timber Bank* will be the Client on Report will satisfy the parameter sequence and trigger the rule profile. In other words, the **Client** parameter will work here in the same standard way any **Client** parameter will work if no further settings are configured for it.

Now let's consider the following screenshot:



Note that here the staff user has cleared the **Five Oaks Credit Union** check box. This Admin Rule Profile is telling us that orders placed by *Timber Bank* and *Howard Financial* for appraisals on which *Timber Bank* will be the Client on Report will satisfy the parameter sequence and trigger the rule profile. However, orders placed by *Five Oaks Credit Union* for which *Timber Bank* will be the Client on Report (see [Figure 2.6](#) for an example of an order form where the **Client** and **Client displayed on report** selections match this order scenario) will not trigger the rule profile and so will not be automatically assigned to an AMC staff user.

Figure 2.6. Appraisal order form showing a scenario where the Client on Report doesn't match the ordering client company.

REQUEST A NEW APPRAISAL

Assignment Information

<p>Client *</p> <div style="border: 1px solid red; padding: 2px;">Five Oaks Credit Union</div> <p>Ordered For *</p> <div style="border: 1px solid gray; padding: 2px;">Jim Tickman</div> <p>Client displayed on report *</p> <div style="border: 1px solid red; padding: 2px;">Timber Bank</div>	<p>Due Date</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> <p>Appraisal Form *</p> <div style="border: 1px solid gray; padding: 2px;">Standard 1004</div> <div style="border: 1px solid orange; padding: 2px; text-align: center; color: orange;"> Click to Add Additional Form </div>
--	--

And finally, let's consider the following screenshot:

The screenshot shows the 'Admin Rule Profile' configuration interface. On the left, there is a table with columns 'Client' and 'Location'. Below the table, there are three rows of data, each with a checkbox and a label: '1. [D] [B] [BK] Howard Financial [round robin] [use location rule]', '2. [D] [B] [BK] National Trade Bank [round robin] [use location rule]', and '3. [D] [B] [BK] Timber Bank [round robin] [use location rule]'. On the right, a 'Select Broker' dialog box is open. It has a title bar with 'x' and a close button. Below the title bar, there is a list of brokers with checkboxes: 'Timber Bank' (unchecked), 'Five Oaks Credit Union' (checked), and 'Howard Financial' (checked). There are also buttons for 'Check All', 'UnCheck All', and 'auto add new brokers' (checked). At the bottom of the dialog, there are 'Submit' and 'Cancel' buttons.

In this case, note that the staff user has cleared the **Timber Bank** check box. What this Admin Rule Profile says is that any order placed for an appraisal that will display *Timber Bank* as Client on Report *but that was not placed by Timber Bank* will satisfy the parameter sequence and trigger the rule profile.

To make sense of this configuration, remember that clients will often place orders for which they also serve as the Client on Report. It's only in the case of orders placed by brokering entities that the Client on Report is different from the client placing the order. This Admin Rule Profile, then, is meant to make explicit that for orders placed by *Five Oaks Credit Union* or *Howard Financial* for which *Timber Bank* is the Client on Report, the parameter sequence will be satisfied and the rule profile triggered.

Configuring new Admin Rule Profile: Procedure Unit 2—Location parameters

1. To set **Location** parameters for a new Admin Rule Profile, click **Add State** in the **Location** field of the **Admin Rule Profile** configuration table.
2. When the **Select State** dialog box opens, select the check boxes associated with the states that you want to serve as locational rule parameters. These states will appear in the **Location** column.
3. To further refine the locational parameter to specific counties, click **[C]**, leave the check boxes associated with the counties you want included in the rule filled, and clear the check boxes associated with the counties you want to exclude from the rule.
4. Click **Submit** when finished.

Configuring new Admin Rule Profile: Procedure Unit 3—Process Status parameters

Usage Note 1: When set, **Process Status** parameters will dictate that an order be assigned only when the order moves into or through the statuses that are selected. Once the order reflects a status that is not part of the configuration, assignees of the Rule Profile will no longer be assigned to the order.

1. To set **Process Status** parameters for a new Admin Rule Profile, click **Add Status** in the **Process Status** field of the Admin Rule Profile configuration table.
2. When the **Select Status** dialog box opens, select the check boxes associated with the process statuses that you want to serve as parameters.
3. Click **Submit** when finished.
4. Depending on the statuses that now appear in the **Process Status** column, further configurations are possible.
5. Clicking **[round robin]** beside any status will toggle this control to read **[monitor only]**, signifying that when the configured status triggers the Rule Profile, the Monitor Only setting will apply. An order will no longer be assigned when it hits this status, then, and assignees of the Rule Profile will only be able to view the order when it's in that status. Assignment would have to be manual.
6. In cases where **Assigned** is used as a **Process Status** parameter, clicking **[designations]** beside **Assigned** will open the **Select designations** dialog box. Select the check box associated with the appraiser designation you wish to apply, then click **Submit**.

Usage Note 2: The appraiser designations shown in the **Select designations** dialog box will correspond to the **Vendor Status** categories, which you can configure at the global level by going to **Settings > Options > Appraiser Assignment > Configure the Vendor Status categories > Configure**. The **Vendor Status** categories created at the global level in the **Appraiser Designation** dialog box will provide your choices in the **Select designations** dialog box, which means that you can configure a Rule Profile of a type that's selectively triggered by an order in an **Assigned** status only if the appraiser it has been assigned to carries the designation you've selected.

7. In cases where **On Hold** is used as a **Process Status** parameter, clicking **[view only assigned]** beside **On Hold** will change the text to read **[view all]**, signifying that by this Rule Profile, assignees can view all orders in an **On Hold** status. When **[view only assigned]** is the configuration used, assignees will see only those **On Hold** orders that they are assigned.
8. For some statuses, **[rev type]** will appear as a configuration option. Click **[rev type]** to open the **Select Revision Type** dialog box. If there are any revision types that you do not want to apply to your parameter, you will clear the check boxes associated with these revision types, then click **Submit**.

Usage Note 3: Configuring a Rule Profile by limiting the revision types in this way will allow you to assign different revision types to different sets of staff users by Admin Rule Profile.

Configuring new Admin Rule Profile: Procedure Unit 4—Jobtype parameters

1. To set **Jobtype** parameters for a new Admin Rule Profile, click **Add Jobtype** in the **Jobtype** field of the **Admin Rule Profile** configuration table.
2. When the **Select Jobtype** dialog box opens, select the check boxes associated with the jobtypes that you want to serve as rule parameters.
3. Click **Submit** when finished.
4. The selected statuses will appear in the **Jobtype** column.

Configuring new Admin Rule Profile: Procedure Unit 5—Paid Status parameters

1. To set **Paid Status** parameters for a new Admin Rule Profile, click **Add Paid Status** in the **Paid Status** field of the **Admin Rule Profile** configuration table.
2. When the **Select Paid Status** dialog box opens, select the check box associated with the paid status that you want to serve as rule parameter.
3. Click **Submit** when finished.
4. The selected status will appear in the **Paid Status** column.

Assigning an Admin Rule Profile

1. To assign an Admin Rule Profile to staff users from the **Admin Rule Profiles** page, click **[Permissions]**.
2. When the **Admin Rule Profile Permissions** box opens, clear the check boxes next to any staff users that you don't want to be able to choose this Admin Rule Profile from the **Rule Profile** drop-down box. The remaining staff users will be able to choose the profile from their platform-interface.
3. Click **Save**.
4. The staff users chosen will now be able to select the rule profile from their **Rule Profile** drop-down box.

Reviewer Rule Profiles page

The **Reviewer Rule Profiles** page offers AMC's rule profile functionality to manage the review process for client orders. Reviewer Rule Profiles perform a different function in the platform to the one that Admin Rule Profiles perform, but the same [principles that govern Admin Rule Profiles](#) also govern Reviewer Rule Profiles.

An AMC staff user will set parameters for Reviewer Rule Profiles that orders will be compared against, and after the rule profiles have been created and configured, they can be assigned to AMC staff reviewers. Reviewer Rule Profiles differ from Admin Rule Profiles in that they automatically assign orders to staff reviewers by default through a round robin process. There is no [Monitor Only configurability](#) available for Reviewer Rule Profiles.

Reviewer Rule Profiles can be configured in the **Reviewer Rule Profile** configuration table, accessible by clicking **Reviewer Rule Profiles** in the **Staff** tab menu. Users will also be able to view already-configured Reviewer Rule Profiles in these configuration tables. To view the configuration table for a specific Reviewer Rule Profile, a user will select the rule profile from the **Profile Name** list at the top of the **Reviewer Rule Profiles** page.

As was the case for Admin Rule Profiles, parameters can be set for any Reviewer Rule Profile by **Client**, **Location**, **Process Status**, **Jobtype**, and/or **Paid Status**. AMCs can choose to set parameters in some or all of these categories, and the Reviewer Rule Profile will filter orders based on only those parameters that have been set. For conceptual information about parameters, see the [Parameters explained](#) section. The procedures for applying and managing Reviewer Rule Profiles follow below.

REVIEWER RULE PROFILES NAVIGATIONAL DETAILS

Figure 2.7. Detail showing Reviewer Rule Profiles page.

Client	Location	Process Status	Jobtype	Paid Status
<input type="button" value="Add Company"/>	<input type="button" value="Add State"/>	<input type="button" value="Add Status"/>	<input type="button" value="Add Jobtype"/>	<input type="button" value="Add Paid Status"/>
1. [D] [B] [BK] National Trade Bank				

Note: The **Reviewer Rule Profiles** configuration table is functionally the same as the **Admin Rule Profiles** configuration table. Users may notice that the configurability for providing permissions and for Round Robin assignment are both absent here. Configurability of all parameters, however, will be the same for Reviewer Rule Profiles as it was for Admin Rule Profiles.

REVIEWER RULE PROFILES CONFIGURATION PROCEDURES

Adding and configuring a new Reviewer Rule Profile

1. To add a new Reviewer Rule Profile to your platform-version from the **Staff** tab, click **Reviewer Rule Profiles** in the **Staff** tab submenu.
2. Click **Add New Profile**, enter a name for the new profile into the **New Profile Name** text box, and click **Save**.
3. Next, click the **Profile Name** box and choose the new profile that you just saved.
4. The Reviewer Rule Profile can be configured by **Client**, **Location**, **Process Status**, **Jobtype**, and **Paid Status**, each rule parameter occupying its own column of the **Reviewer Rule Profile** configuration table.

All new Reviewer Rule Profiles created this way will be available to assign moving forward in an AMC's platform-version. Once a rule profile is saved to a platform-version, edits and modifications can be made to the profile when it's chosen from the **Profile Name** list on the **Reviewer Rule Profiles** page. An existing profile can also be deleted after it's been chosen from the **Profile Name** list by clicking **Delete Profile**, and the name of an existing profile can be changed by clicking **Edit Profile Name**, typing the new name in the **Edit Profile Name** text field, and clicking **Save**.

Configuring new Reviewer Rule Profile: Procedure Unit 1—Client parameters

1. To set **Client** parameters for a new Reviewer Rule Profile, click **Add Company** in the **Client** field of the **Reviewer Rule Profile** configuration table.
2. When the **Select Company** dialog box opens, select the check boxes associated with the companies you want the rule profile to apply to. Click **Submit** when finished.
3. Proceed to the following **Client** parameter configuration procedures to set further **Client** parameters.

Configuring Client parameters—applying Client Branch parameters

Usage Note: The **Client Branch** parameter should be used in instances when an AMC wants Reviewer Rule Profile assignees to be limited to handling appraisal reviews for orders initiated by a particular branch of a client company.

1. To configure **Branch** settings for a Client parameter, click **[B]**.
2. The **Select Branch** dialog box will open with a full list of branches associated with a client company.
3. Clear the check boxes associated with any of the branches that you want to exclude from this parameter.
4. Clicking the **Check All** and **UnCheck All** buttons will select or clear all **Branch** check boxes in the dialog box.
5. If you want all new branches created for a client company to automatically apply to the Reviewer Rule Profile, leave the **auto add new branches** check box selected.
6. Click **Submit** when finished.

Configuring Client parameters—applying Client Broker parameters

Usage Note: The **Client Broker** parameter may be used in instances when an AMC wants to single out specific entities that have a broker relationship with the client to trigger the rule profile, instances when the **Client** parameter will reflect a client company acting as Client on Report.

1. To configure the **Client** parameter for a specific broker relationship that a client company has, click **[BK]** next to the **Client** parameter.
2. The **Select Broker** dialog box will open with a full list of lenders that have a brokering relationship with this client company.
3. Select the check boxes associated with the brokers you'd like to include as parameters in the Rule Profile, and leave the check boxes for any other brokers empty.
4. Clicking the **Check All** and **UnCheck All** buttons will select or clear all Broker check boxes in the dialog box.

5. The **auto add new brokers** check box should remain selected if a new broker should automatically be applied to the Reviewer Rule Profile when added in a client company profile.
6. Click **Submit** when finished.

Configuring new Reviewer Rule Profile: Procedure Unit 2—Location parameters

1. To set **Location** parameters for a new Reviewer Rule Profile, click **Add State** in the **Location** field of the **Reviewer Rule Profile** configuration table.
2. When the **Select State** dialog box opens, select the check boxes associated with the states that you want to serve as locational rule parameters. These states will appear in the **Location** column.
3. To further refine the locational parameter to specific counties, click **[C]**, leave the check boxes associated with the counties you want included in the rule filled, and clear the check boxes associated with the counties you want to exclude from the rule.
4. Click **Submit** when finished.

Configuring new Reviewer Rule Profile: Procedure Unit 3—Process Status parameters

Usage Note 1: When set, **Process Status** parameters will dictate that an appraisal form be available for review only when the form moves into or through the statuses that are selected. Once the review reflects a status that is not part of the configuration, assignees of the Rule Profile will no longer see the appraisal for review.

1. To set **Process Status** parameters for a new Reviewer Rule Profile, click **Add Status** in the **Process Status** field of the **Reviewer Rule Profile** configuration table.
2. When the **Select Status** dialog box opens, select the check boxes associated with the process statuses that you want to serve as rule parameters.
3. Click **Submit** when finished.
4. If there are any revision types that you do not want to apply to your **Process Status** parameters, click **[rev type]** next to a parameter.
5. In the **Select Revision Type** dialog box, clear the check boxes associated with any revision type that you do not want to apply to your parameter, then click **Submit**.

Usage Note 2: Limiting the revision types in this way allows you to make the review available only to the reviewers you want handling a particular revision type.

Configuring new Reviewer Rule Profile: Procedure Unit 4—Jobtype parameters

1. To set **Jobtype** parameters for a new Reviewer Rule Profile, click **Add Jobtype** in the **Jobtype** field of the **Reviewer Rule Profile** configuration table.
2. When the **Select Jobtype** dialog box opens, select the check boxes associated with the jobtypes that you want to serve as rule parameters.
3. Click **Submit** when finished.
4. The selected statuses will appear in the **Jobtype** column.

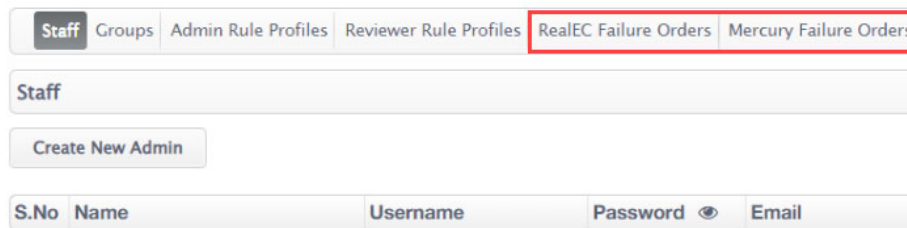
Configuring new Reviewer Rule Profile: Procedure Unit 5—Paid Status parameters

1. To set **Paid Status** parameters for a new Reviewer Rule Profile, click **Add Paid Status** in the **Paid Status** field of the **Reviewer Rule Profile** configuration table.
2. When the **Select Paid Status** dialog box opens, select the check boxes associated with the paid statuses that you want to serve as rule parameters.
3. Click **Submit** when finished.
4. The selected statuses will appear in the **Paid Status** column.

Failure Orders pages

The Failure Orders pages are tied to the integrations that an AMC has enabled on their Appraisal Scope platform-version. A Failure Orders page will be available on an AMC's Staff tab menu for each integration that is set up (see Figure 2.8). A staff user can click the relevant Failure Orders button from the Staff tab menu to view a table with details as to which orders created through a specific integration have failed and why. For additional information regarding failure orders, contact Appraisal Scope support.

Figure 2.8. Detail showing an example Staff tab menu with accessibility to Failure Orders pages highlighted.



Approving a new client company

REQUIRED PERMISSIONS

An AMC staff user will need access to the **Pending Users** page, accessible from the **Main Page** by clicking the **Users** tab, in order to approve a new client company.

INTRODUCTION

When a new client signs up with a platform-version using the **Client Sign Up** tab, staff users designated to accept new clients will receive an auto-generated notification email. A staff user should take special note of the **Client Company** line in the email they receive, because they will locate the profile to be approved by this company name. The client company, along with the new client user who has signed the new client company up, will be in a Pending status until approved by a staff user using the following procedures.

PROCEDURES

1. To access the **Users** tab submenu, click the **Users** tab from the main tab menu.
2. Next, click the **Pending Users** tab from the **Users** tab submenu to access a list of clients on the right side of the page, under the **Pending Clients** header. At this point, find the entry that matches the client company name by looking through the **Pending Clients** list, or by typing the name into the **Company Name** text box in the **Search** fields on the left side of the page.
3. When the entry associated with this client company name has been located, click **Approve** from under the **Action** column at the right of the **Pending Clients** list. This will open the **Client Validation** dialog box.
4. Information for the pending client company will be in the **Client Information** section at the top of the dialog box, and the details about the pending client user affiliated with the company will be in the **User Information** section at the bottom of the dialog box.

Note: You can verify that this is a new client company request that you're approving by checking the **Company Details** list on the left side of the **Client Validation** dialog box. If the message *No Result(s) Found* appears in the list, then this is a new client company request that you're approving. Otherwise, see the *Approving a new client user* procedures following this procedure set for appropriate instructions.

5. If you're ready to add profiles for this client company and affiliated client user to your platform-version, enter a password of minimum eight characters and containing at least one upper case letter, one lower case letter, and one number or symbol into the **Password** text box, and then select the **Set as temporary** check box if you'd like to give the client user the option to change their password.

6. Lastly, click **Register** and then **Continue** in the **Confirm** dialog box to add the client company and affiliated client user to your platform-version. Appraisal Scope will generate an email supplying the password and notifying the new client user that their profile and the new client company profile have been added to the platform-version.

Approving a new client user

REQUIRED PERMISSIONS

An AMC staff user will need access to the **Pending Users** page, accessible from the **Main Page** by clicking the **Users** tab, in order to approve a new client company.

INTRODUCTION

When a new client user signs up with a platform-version using the **Client Sign Up** tab, staff users designated to accept new clients will receive an auto-generated notification email. A staff user should take special note of the **Client Company** line in the email they receive, because they will locate the profile to be approved by this company name. The client user will be in a **Pending** status until approved by a staff user using the following procedures.

PROCEDURES

1. To access the **Users** tab submenu, click the **Users** tab from the main menu.
2. Next, click the **Pending Users** tab from the **Users** tab submenu to access a list of clients on the right side of the page, under the **Pending Clients** header. At this point, find the entry that matches the client company name by looking through the **Pending Clients** list, or by typing the name into the **Company Name** text box in the **Search** fields on the left side of the page.
3. When the entry associated with this client company name has been located, click **Approve** from under the Action column at the right of the **Pending Clients** list. This will open the **Client Validation** dialog box.
4. Information for the pending client user will be in the **User Information** section at the bottom of the dialog box. If you're ready to add this user to your platform-version, enter a password of minimum eight characters and containing at least one upper case letter, one lower case letter, and one number or symbol into the **Password** text box, and then select the **Set as temporary** check box if you'd like to give the client user the option to change their password.
5. Next, go to the **Company Details** list on the left side of the **Client Validation** dialog box and click **Select**. When the **Branch Details** list appears, choose the entry for the branch that this client user should be affiliated with and click **Select**.
6. When you're sure that all information for this client user is correct, click **Register** to add the client user to your platform-version. Appraisal Scope will generate an email supplying the password and notifying the user they've been added to the platform-version.

CHAPTER 3. SETTINGS: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Settings tab

The **Settings** tab contains a collection of pages where AMCs can configure administrative settings that will impact many aspects of their platform-version functionality. In addition, AMCs will find controls here that will allow them to set up on their platform-version the visual and textual elements unique to their company.

A user will click the **Settings** tab from the main tab menu to access the **Settings** tab menu. All pages accessible from the **Settings** tab menu and the functionality available within them are documented below.

Company Information

The **Company Information** page is where AMCs will enter the name, address, and contact details that will appear on their invoices; establish the email settings that will accompany the notifications they send; and set up the visual and textual elements that will be displayed on their platform-version and in their **Contact Us** tab.

All AMC information entered through the **Company Information** page will need to be saved by clicking **Save Information** at the bottom of the page. If an admin user would like to reset the information captured in the text fields of the **Company Information** page to the state it was in before it was last saved, they will click **Reset**.

Note: The Reset button functionality does not apply to information entered into the **Contact Us Information** and **Company Signature** text editors.

Company information displayed on invoices

Some of the information entered into the text fields on the **Company Information** page will display on an AMC's invoices. Figure 3.1 shows which specific text fields will capture information that will be displayed on invoices.

Figure 3.1. Text fields for information that will display on an AMC's invoices.

Company Name:	<input type="text" value="Documentation"/>
Address:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text" value="Select a State"/>
Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>
Website:	<input type="text"/>
Federal Tax ID	<input type="text"/>

Note: The phone number entered into the **Phone** field above will also appear on the **Login** page associated with an AMC's platform-version.

Company information impacting emails

Some of the information entered into text fields on the **Company Information** page will be used to direct and populate all email notifications sent from an AMC's platform-version. The following text fields capture this information.

Notification Email. The email address entered into this text field is the email address from which an AMC's notification emails will be sent.

Notification Email Name. The name entered into this text field is the name that will be displayed in the **From** field associated with an AMC's notification emails.

Company Signature. The **Company Signature** text editor dialog box is located on the bottom right-hand side of the **Company Information** page. The details typed and formatted in this dialog box can be used as the signature to close emails generated by a platform-version.

The signature created here is intended to be used along with the email templates that an AMC has created in their platform-version. For an AMC to configure their platform-version to use this signature in an email generated from a template, an admin user will need to include the **[company_signature]** tag when they create that template.

Company information controlling visual elements

An AMC can choose their color scheme and logo that will appear on their Appraisal Scope platform-version from the **Company Information** page.

To set a color scheme, a user will click the **Company Name Color** text field and enter either the RGB code, HSB code, or hex code specific to their AMC.

To choose the logo that will appear on a platform-version, a user will click **Choose File** next to the **Company Logo** line on the page and choose their logo from their file directory.

Company information: Contact Us message

An AMC can create from the **Company Information** page the message that will display to clients and appraisers who click **Contact Us** from their platform interface. This message can be typed and formatted in the **Contact Us Information** text editor dialog box located on the upper right-hand side of the page.

Notification

The **Notification** page gives AMCs a place to create and edit custom notifications to be directed to clients, staff, or appraisers. All notifications once created will be visible in a list on the right side of the **Notification** page. Admin users will be able to edit or delete any entry in the list by clicking the appropriate icon under the **Edit** or **Delete** column of the list.

To create notifications, an admin user will type the title they'd like to give to the notification message in the **Title** text field, and then the text of their intended message in the **Message** text field. When finished, the user will click **Add Notification**. Notifications created here will appear as options available in the **Additional Notifications** drop-down list, accessible from the **Appraisal** page, **Updates** tab.

A user can also make a notification available to appraisers as a status update option by selecting the **Set for appraiser** check box associated with the appropriate list entry. Providing these options to appraisers allows an AMC to stay in control of their update notifications, and it's a good way for the AMC to ensure that they are receiving consistent information from appraisers across the board. It also benefits the appraiser, allowing them to quickly update an order status with preset text, eliminating the need for them to write out a bunch of information.

File

The **File #** page gives AMCs a place to establish a nomenclature for order file numbers.

To establish a nomenclature for order file numbers, an admin user will enter an identifier in the **Label** text box, select **Prefix** or **Postfix** to denote whether this identifier will appear before or after the file number, enter the number that this nomenclature will begin with in the **Start At** text box, and then click **Save**.

After a nomenclature has been established, it will be visible under the column headers at the bottom of the **File #** page. Each new nomenclature that is established will be added to this list, which will provide a historic record of each nomenclature created. The value in the **Next Value** column will increase as orders are placed, and so this value at any given time will reflect the number of orders placed since the creation of a given nomenclature.

Invoice

The **Invoice #** page gives AMCs a place to establish a nomenclature for invoice numbers.

To establish a nomenclature for invoice numbers, a user will enter an identifier in the **Invoice Label** text field, select **Prefix** or **Postfix** to denote whether this identifier will appear before or after the invoice number, enter the number that this nomenclature will begin with in the **Start At** text field, and then click **Save**.

After a nomenclature has been established, it will be visible under the column headers at the bottom of the **Invoice #** page. Each new nomenclature that is established will be added to this list, which will provide a historic record of each nomenclature created. The value in the **Next Value** column will increase as invoices are generated, and so this value at any given time will reflect the number of invoices generated since the creation of a given nomenclature.

Document Upload

The **Document Upload** page is where an admin user will create labels to describe additional documents uploaded to an order, upload documents to be kept as system documents, and create templates. Users will also be able to edit or delete the elements accessible from this page.

Uploading system documents

To upload a new system document, an admin user will click **Select File** in the upper left-hand side of the **Document Upload** page and choose a file to upload from the file directory. Files uploaded in this manner will be listed under the **System Documents** section on the right side of the **Document Upload** page. These files will remain accessible there and will be removable at any time by clicking the **Delete** icon associated with the relevant file entry.

Creating new templates

To create a new template, an admin user will first click **Create Document** and enter the name of the new template in the **Document Template Name** text field. The user can select a tag if they wish from the **Insert Tag** drop-down list, which will draw text into their template from any of a variety of system locations, and then they can create the style and wording of the new template using the text editor box. To save the template in the system, the user will need to click **Save**. Templates created this way will remain accessible under the **Templates** section on the right side of the **Document Upload** page and will be editable or removable at any time by clicking the **Edit** or **Delete** icon.

Note: Tags represent data points drawn from an order or from the platform itself—for example, AMC company information.

Templates created here can be used for two different purposes. First, these templates can be created with information that's intended to appear in a completed appraisal form (see the [Client – Order Completion](#) section for details regarding this template configuration). Templates created here can also be used to generate documents that will be attached to completed appraisal notification emails (see the [Creating an Additional Document](#) section).

Adding an additional document type

The **Additional Document Type** list, located at the top right-hand side of the page, holds document type options that can be selected by users when uploading additional documents to an order (see the [Creating an Additional Document](#) section for more details). Several document labels come preloaded in the Appraisal Scope platform. To make a document type label available for a vendor user to choose when uploading additional documents to an order, an admin user will select the **Display To Admin**, **Display To Client**, and/or **Display To Appraiser** check boxes associated with the document label entry in the **Additional Document Type** list. To exclude a document type label from the options available to all users, the user will leave all of these check boxes clear.

An admin user can add a new document type label by clicking **Add New**, to the right and just above the **Additional Document Type** header row. The user will then enter in the **Document Label** text field the label to be added, choose who will see it in the **Document Type** drop-down list on the **New Appraisal** order form by selecting the appropriate check boxes, and click **Save**. Document labels created this way will remain accessible under the **Additional Document Type** section on the right side of the **Document Upload** page and will be editable or removable at any time by clicking the **Edit** or **Delete** icon.

System Templates

The **System Templates** list, located at the bottom of the **Document Upload** page, displays the templates that are available by default in Appraisal Scope. These templates can be edited by clicking the **Edit** icon associated with the template to be edited.

Note: Appraisal Scope maintains a log of changes made from the **Document Upload** page. To see the log, a user will click the **log** icon, located in the top right-hand corner of the page.

Predefined Messages

The **Predefined Messages** page is where admin users can create and edit messages that will be accessible from the **Email Office** page associated with an order record. The predefined messages created here will populate the **Select Predefined Message(s)** drop-down list available when a user clicks **Send a message** from the **Email Office** page (see the [Email Office](#) section for more details).

Predefined messages can be created in any of three categories: General Message, Revision Message, or RCR Message. These categories correspond to the options in the **Message type** drop-down list.

To add a predefined message, a user will enter the message title in the **Title** text field, select the message category from the **Message type** drop-down list, and type the message out in the **Message** text box. The user can clear these fields before saving the message by clicking **Reset**, or save the message by clicking **Add Notification**.

A predefined message created here will be listed in the **Predefined Message** list that corresponds to its category. The **General Messages** list appears at the top right-hand side of the page, and admin users will have the ability to edit or delete the messages listed here by clicking the **Edit** or **Delete** icon associated with the relevant entry.

The **Revision Message** list will appear just beneath the **General Messages** list. Users will have the option to edit or delete messages that appear here as well, but they also have the option to configure how these messages display. A user will select the check box in the **Display To Client** field associated with the relevant message to

have the message appear on a client user's platform-version. If an admin user wants a message to display only to another staff user, then they will select the check box in the **Display To Admin** field associated with the pertinent message.

The **RCR Messages** list will appear beneath the **General Messages** list. Users will once again have the option to edit or delete messages that appear here. These messages pertain to vendors carrying out a RealCondition Report (RCR). They allow an AMC staff user to communicate directly with an RCR vendor from their platform-version.

Note: Where predefined messages appear as options in drop-down lists, they are listed by their title.

Import Client

The **Import Client** tab allows admin users to import to their platform-version a CSV file containing client company information. The information imported through the CSV import can be used to create a client company profile. This process can be used in place of the previously documented procedures to create a client company profile (see the section [Adding a new client company from the Client tab](#) for more details).

Admin users will find on their platform-version a downloadable file sample that they can access via the **Download CSV File Sample** link at the top of the **Import Client** page. This file can be used as a template. It includes all of the **Required columns** listed on the platform-interface under the **NOTE**, along with other columns that are available to collect information but that are not required. If an admin user is going to import a file other than this template, then the user will need to make sure that it has been saved as a CSV file before it's imported.

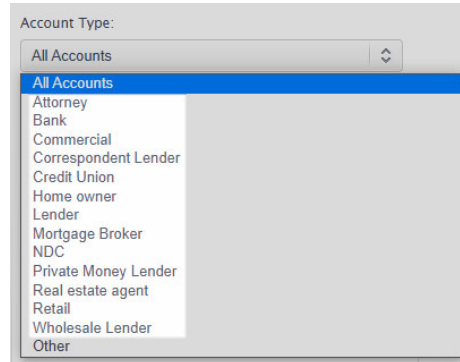
Importing a client company

1. From the **Import Client** page, click **Select File**.
2. From your local directory panel, choose the file to be imported, and then click **Open**.
3. This will bring up two columns: **Imported File** on the left, and **Company Profiles** on the right.
4. Drag-and-drop each selection from the **Imported File** column to the Require Field space in the **Company Profiles** column that corresponds to the information represented by that selection. Note that the required information is highlighted against a red background. The information that is not required will only need to be matched up with a corresponding white field if that information is included in the CSV file.
5. After all components have been matched, click **Import**.
6. The **Import Client Result** dialog box will open, notifying you whether the import was carried out successfully and how many client companies were included in the import. Click **Close**.

- The new client company profile associated with this import will now be accessible from the **Users** tab, **Client** tab.

Note regarding CSV format errors: If an import cannot be successfully carried out due to an error in the CSV file being imported, a dialog box labeled **Import Client Result** will appear. This box will contain a link to download a spreadsheet, which will give the user the reason why an import has failed.

Note regarding the Account Type column: The **Account Type** column requires that a user enter one of the standard client company types within Appraisal Scope. The following screenshot displays the Account Type dropdown list in the **Client** sub-page **Search** pane, accessible by going **Users > Client**. The standard client company types available by default in Appraisal Scope are spotlighted.



Import Users

The **Import Users** tab allows admin users to import to their platform-version a CSV file containing client user information. This process can be used in place of the previously documented procedures to create a client user profile (see the section [Adding a new client user to an existing client company profile](#) for more details).

Admin users will find on their platform-version a downloadable file sample that they can access via the **Download CSV File Sample** link at the top of the **Import Users** page. This file can be used as a template. It includes all of the **Required columns** listed on the platform-interface under the **NOTE**, along with other columns that are available to collect information but that are not required. If an admin user is going to import a file other than this template, then the user will need to make sure that it has been saved as a CSV file before it's imported.

Importing a client user

- From the **Import Client** page, click Select **File**.
- From your local directory panel, choose the file to be imported, and then click **Open**.
- This will bring up two columns: Imported File on the left, and Company profiles on the right.
- Drag-and-drop each selection from the **Imported File** column to the **Require Field** space in the **Company Profiles** column that corresponds to the information represented by that selection. Then click **Import**.
- The **Import Client Result** dialog box will open, notifying you whether the import was carried out successfully and how many client companies were included in the import. Click **Close**.
- The new client company profile associated with this import will now be accessible by going to **Users > Client**.

Note regarding CSV format errors: If an import cannot be successfully carried out due to an error in the CSV file being imported, a dialog box labeled **Import Client Result** will appear. This box will contain a link to download a spreadsheet, which will give the user the reason why an import has failed.

Note regarding the User Type column: The User Type column requires that an AMC staff user enter one of the standard client user types within Appraisal Scope: Processor, Loan Officer, and Manager.

UCDP

The **UCDP** page is where an AMC can enter their credentials to the Government-Sponsored Enterprise (GSE) Uniform Collateral Data Portal (UCDP). To enter credentials, an admin user will type them in the **User ID** and **Password** text fields and click **Save**. The AMC's credentials will be saved in Appraisal Scope after they've been provided.

Reminders

The **Reminders** page provides settings that can be customized, configured for automation, and activated so that Appraisal Scope will automatically generate and send email reminders to appraisers and/or staff. These emails will remind platform users about upcoming important dates and time critical tasks, approaching license or E&O coverage lapses, and invoice payments that have gone delinquent.

The **Reminders** page is broken into three sections, each section representing a different category of reminder. The settings available under each section and how to configure them are detailed in the following text.

Setting up reminders

ORDER REMINDERS SENT TO APPRAISERS SECTION

When the reminders in this section are activated, Appraisal Scope will automatically send an email to any appraiser reminding them of an important due date or status requirement. Any reminder that has been activated can be deactivated by clicking the **Activate/Deactivate** toggle switch so that it says **Activate**.

Note: All time-dependent reminders will be based on the Appraisal Scope Server Time. This time counter is located in the upper right-hand corner of the Reminders page.

Appraisal due reminder

1. To set a reminder to go out when an appraisal deadline is approaching, first click the middle drop-down box and choose how you'd like Appraisal Scope to interpret the due date: by **Estimated Completion Date**, **Appraisal Due Date**, or **Appraiser Due Date**.
2. Now click the first drop-down box and choose one of the time increments from 1 to 48 hours before the scheduled due date arrives. This will set your platform-version to send the reminder the chosen number of hours before the due date.
3. If you want, instead, to set a reminder to go out at a specific cutoff time on the due date, click the first drop-down box and select **On cut off time**.
4. Next, click the **Cutoff Time** box and select a specific cutoff time. This will set your platform-version to send the reminder at that time on the due date.
5. When you're finished configuring the appropriate settings, click **Activate** on the right side of the page.

Unaccepted reminder

1. To set a reminder that will go out at a selected time after the date an order has been assigned, type a time increment in the **Hours after assigned date** text box.
2. Next, if you want to configure the system to only consider business hours in its time calculation, click **Options**, select the **Include Only Business Hours** check box, and click **Submit**.
3. If you want to configure Appraisal Scope to exclude in its time calculation holiday hours that have been set in your platform-version, click **Options**, select the **Exclude Holiday** check box, and click **Submit**.
4. When you've finished configuring the appropriate settings, click **Activate**.

Note: An admin user will also receive these reminders when their email preferences have been configured to allow it by going to **Staff** tab, then **Staff** subtab, clicking the **Email** field associated with the **Staff** list entry for that admin user, and making a choice for the **Unaccepted Reminder** setting.

Update status reminder

1. To set a reminder that will go out when a selected amount of time has passed since a previous status update was submitted, click the **Time Increment** box and select a time increment.
2. This reminder will be set by appraisal form. To choose the appraisal form(s) to which the status reminder will apply, first click **Select Appraisal Forms**.
3. When the **Select Jobtype** dialog box opens, make sure the check boxes associated with appraisal forms for which this reminder will apply are selected, and clear any check boxes associated with appraisal forms for which the reminder will not apply.
4. When you're finished, click **Submit** and then click **Activate**.

Appraisal late

1. To set a reminder to go out when an appraisal has passed its due date, first click the middle drop-down box and choose how you'd like Appraisal Scope to interpret the due date: by **Estimated Completion Date**, **Appraisal Due Date**, or **Appraiser Due Date**.
2. Now, click the first drop-down box and choose one of the time increments from 1 to 48 hours after the scheduled due date arrives. This will set your platform-version to send the reminder the chosen number of hours after the due date.
3. If you want, instead, to set an Appraisal Late reminder to go out at a specific cutoff time on the due date, click the first drop-down box and select **On cut off time**.
4. Next, click the **Cutoff Time** box and select a specific cutoff time. This will set your platform-version to send the reminder at that time on the due date.
5. When you're finished configuring the appropriate settings, click **Activate** on the right side of the page.
Note: An admin user will also receive these reminders when their email preferences have been configured to allow it by going to **Staff** tab, then **Staff** subtab, clicking the **Email** field associated with the **Staff** list entry for that admin user, and making a choice for the **Late Reminder** setting.

Revisions reminder

1. To set a reminder that will go out at a selected time after the date a revision has been sent, click the **Revisions Reminder** box and select your desired time increment.
2. (Optional) Next, if you want to configure the system to only consider business hours in its time calculation, click **Options**, select the **Include Only Business Hours** check box, and click **Submit**.
3. (Optional) If you want to configure Appraisal Scope to exclude in its time calculation holiday hours that have been set in your platform-version, click **Options**, select the **Exclude Holiday** check box, and click **Submit**.
4. When you've finished configuring the appropriate settings, click **Activate**.

Inspection reminder

1. To set a reminder, regarding a needed inspection, that will go out at a selected time after the Assigned or Accepted date of an order, click the **Time Increment** box and choose your desired time increment.
2. Next, click the **Date** box and choose whether you want the Assigned date or Accepted date to determine when the reminder goes out.
3. (Optional) If you'd like to set reminders to go out for certain appraisal forms only, click **Select Appraisal Forms**, and in the **Select Jobtype** dialog box, make sure the check boxes associated with appraisal forms for which this reminder will apply are selected.
4. When you're finished configuring the appropriate settings, click **Activate** on the right side of the page.

Update status reminder (daily)

1. To set a reminder that will go out on a regular schedule when a selected amount of time has passed since a previous status update was submitted, click the **Time Increment** box and select a time increment.
2. This reminder will be set by appraisal form. To choose the appraisal form(s) to which the status reminder will apply, first click **Select Appraisal Forms**.
3. When the **Select Jobtype** dialog box opens, make sure the check boxes associated with appraisal forms for which this reminder will apply are selected, and clear any check boxes associated with appraisal forms for which the reminder will not apply.
4. To set the schedule by which Appraisal Scope will send this reminder, click **Set Schedule for reminder**.
5. When the **Set Schedule for reminder** dialog box opens, select the check boxes associated with the regularly scheduled time(s) you'd like these reminders to be sent.
6. When you're finished, click **Submit** and then click **Activate**.

Bid closing reminder

The Bid Closing reminder relates to the way Appraisal Scope handles the bidding process. If an admin user has imposed a deadline for accepting bids (i.e., 12, 24, or 48 hours), then this reminder can be set to notify a user a chosen number of hours before the bidding is closed. An admin user will choose the number of hours from the **Time Increment** box, and then click **Activate**.

Appraisal due reminder (final)

1. To set a "final" reminder to go out when an appraisal deadline is approaching, first click the middle drop-down box and choose how you'd like Appraisal Scope to interpret the due date: by **Estimated Completion Date, Appraisal Due Date, or Appraiser Due Date**.
2. Now, click the first drop-down box and choose one of the time increments from 1 to 48 hours before the scheduled due date arrives. This will set your platform-version to send the reminder the chosen number of hours before the due date.
3. If you want, instead, to set a final reminder to go out at a specific cutoff time on the due date, click the first drop-down box and select **On cut off time**.
4. Next, click the **Cutoff Time** box and select a specific cutoff time. This will set your platform-version to send the reminder at that time on the due date.
5. When you're finished configuring the appropriate settings, click **Activate** on the right side of the page.

PROFILE REMINDERS SENT TO APPRAISERS SECTION

License and/or E&O expiration notice 1

1. To set a reminder to go out when an appraiser's License and/or E&O is approaching expiration, click the drop-down box next to **Send** and choose whether one or both of these items should be included in the reminder.
2. Next, type the number of days before expiration the notice should be sent in the text field.
3. When you're finished, click **Activate**.

License and/or E&O expiration notice 2

1. To set a second reminder to go out when an appraiser's License and/or E&O is approaching expiration, click the drop-down box next to **Send** and choose whether one or both of these items should be included in the reminder.
2. Next, type the number of days before expiration the notice should be sent in the text field.
3. When you're finished, click **Activate**.

License and/or E&O expiration notice 3

1. To set a third reminder to go out when an appraiser's License and/or E&O is approaching expiration, click the drop-down box next to **Send** and choose whether one or both of these items should be included in the reminder.
2. Next, type the number of days before expiration the notice should be sent in the text field.
3. When you're finished, click **Activate**.

Expired license and/or E&O information

1. To set a reminder to go out when an appraiser's License and/or E&O has expired, click the drop-down box next to **Send**, and choose from the options which item expirations to include in the reminder.
2. Next, type in the text field the day of each month this reminder should go out.
3. When you're finished, click **Activate**. Reminders Sent to Staff section

Invoice payment reminder

An admin user can set up a reminder to go out to other staff users after an invoice date has passed by clicking the **Time Increment** box and choosing a time increment. The admin user will then click **Activate**.

Options

The Options tab gives an AMC a location to configure a wide variety of settings that will impact how their Appraisal Scope platform-version performs. It's important to note that the settings applied from the **Options** page are settings applied at a global level. Many of the settings applied here will serve as parameters to other optional settings, impacting how Appraisal Scope will carry out automated processes.

Some of the settings accessible from the **Options** page have their correspondents at the client company, client branch, and client user levels, as well. By configuring settings to apply at those levels, admin users can impact the way their platform-version processes orders on a more case-by-case basis. To read more about the functional levels within Appraisal Scope, see the [Functional levels](#) section.

Information regarding the way that many of the global options accessible from the **Options** tab impact the system is available for users through tooltips on the Appraisal Scope platform-interface. A user can access this information by pointing and hovering on the **Tooltip** icons, located just to the left of each setting. In cases where it was felt that users could benefit from extra context or procedural information around **Options** settings, this information is provided in the following sections.

Searching the Options page

A **Search** box is available over top of the left-hand navigation menu on the **Options** page. This box allows admin users to filter the Options settings in a dynamic way, each letter of a search term that they type narrowing down the selections available to them. By reducing the number of settings in this way, admin users can find what they're looking for more easily without having to know exactly what a particular setting is called.

Options menu

The **Options** menu is a vertical navigation menu on the left side of the **Options** page. The **Options** settings covered in this User Guide are organized in the following sections first by the **Options** menu tab under which they can be found, and subsequently if necessary, by the subsection of that menu tab that they fall under.

OFFICE HOURS

The office hours options give AMCs the ability to set their holidays and regular business hours in their platform-version. These options can be accessed by clicking **Office Hours** in the left-hand navigation menu. Setting these hours here will guide Appraisal Scope in cases where office hours impact the automated processes that the AMC has configured.

Office Hour Settings

Configuring the **Set Holidays** setting

1. From the **Options** page, click **Office Hours** in the left-hand navigation menu.
2. Locate **Set Holidays**, and click **Customize Holidays** to the right of it. The **Holidays** dialog box will open, displaying all holidays that have already been set.
3. To add a holiday to the list from here, click **Add New Holiday**.
4. Enter the holiday name and date in the **Holiday Title** and **Date** text boxes, and then click **Save**.
5. To configure your platform-version to account for a holiday on the **Holidays** list, select the check box associated with a given holiday entry.
6. To configure your platform-version to account for all holidays on your **Holidays** list, select the check box in the header row to the left of **Holiday**.
7. To delete a holiday, click **Delete** in the **Action** column field affiliated with that holiday.
8. When you're finished setting your holidays, click **Save**.

Configuring the **Customize Business Hours** setting

1. From the **Options** page, click **Office Hours** in the left-hand navigation menu.
2. Locate **Hours of Business**, and click the **Customize Business Hours** to the right of it. The **Set Business Hours** dialog box will open, displaying default hours for each day of the week.
3. Select the check box corresponding to each day of the week that you will be keeping regular hours.
4. Next, set business hours for each of these days by clicking the drop-down boxes corresponding to the hours and AM/PM. Please take note of the fact that all times need to reflect Eastern Standard Time. For example, if you are on Pacific Standard Time, you will want the business hours reflected in the **Set Business Hours** box to be three hours ahead of the business hours you are actually keeping.
5. When you're finished setting your business hours, click **Save**.

SIGN UP AND PROFILE

The sign up and profile options pertain to how client users and vendor users will sign up for an AMC's Appraisal Scope platform-version, some of the information that they will be asked to provide at sign up, and certain controls that may be placed on vendor user profiles. These options can be accessed by clicking **Sign Up & Profile** in the left-hand navigation menu.

Client Profile

Configuring the **Manage client user types** setting

Adding client user types using the **Manage client user types** setting will impact options in the **User Type** drop-down list. These are the user type available to new clients who are signing up via the **Client Sign Up** page. The Appraisal Scope default client user types are processor, manager, and loan officer.



Caution: Additional user types that are added to an Appraisal Scope platform-version will not be supported in any integrations.

An admin user can add client user types using the following procedures.

1. From the **Options** page, click **Sign Up & Profile** in left-hand navigation menu.
2. Locate the **Manage client user types** setting in the **Client Profile** section of the page, and click **Configure** to the right of it. The **Client Types** dialog box will open, displaying the client types currently available on your platform-version.
3. Enter your new client user type in the **Add New Client Type** text box, and click **Add**.

4. The new client user type will appear at the bottom of the list. This added user type can be changed at any time from the **Client Types** box by clicking **Edit**, editing the name, and clicking **Save**.
5. The user type can also be deleted by clicking **Delete**.
6. Click **Close** when you're finished configuring a new client type.

Appraiser Sign Up

Configuring the *Display Terms & Conditions to Appraisers upon first login* setting

The **Display Terms & Conditions to Appraisers upon first login** setting allows an AMC to control whether their Terms & Conditions information will display when vendor users log into their platform-version. An AMC will need to create this information using the following procedures if they intend to use this setting.

Note: Any time an AMC updates/changes their Terms & Conditions, appraisers must agree to the new terms upon their next login.

1. From the **Options** page, click **Sign Up & Profile** in left-hand navigation menu.
2. Locate the **Display Terms & Conditions to Appraisers upon first login** setting in the **Appraiser Sign Up** section of the page, and click **Configure** to the right of it. The **Set Terms and Conditions on Appraisers Login** dialog box will open, providing a text editor to create the message.
3. Alter the template text, using the editor controls to give your message the formatting you want.
4. Click **Save** when you're finished.

Appraiser Profile

Configuring the *Calculate Appraisers CU R&W score* setting

An AMC can use the **Calculate Appraisers CU R&W score** setting to have Appraisal Scope automatically calculate the Collateral Underwriter (CU) R&W score. When it's enabled, an appraiser's CU R&W score will be visible on that appraiser's profile. An admin user can configure the settings that will dictate how Appraisal Scope calculates this score using the following procedures.

1. From the **Options** page, click **Sign Up & Profile** in the left-hand navigation menu.
2. Locate the **Calculate Appraisers CU R&W score** setting in the **Appraiser Profile** section of the page, and click **Configure** to the right of it. The **CU R&W Score Settings** dialog box will open.
3. Enter the number of completed reports in the text box, up to 500, that you'd like Appraisal Scope to use when calculating this score.
4. Next, click the **Enter base rating** drop-down box and choose from the available options the rating that you'd like to set as the baseline.

Note: The CU R&W score is calculated as a percentage. Appraisal Scope will take the up-to-date number of completed reports (determined by the number provided in Step 3) for any given appraiser, and from these, the system will count each time a report is completed where the CU score falls below the base rating established in Step 4. The number of reports with CU falling below the base rating will be divided by the total number of completed reports to determine the CU R&W score.

5. Click **Save** when you're finished.

Configuring the *Automatic FHA Roster Management* setting

The **Automatic FHA Roster Management** setting is at the bottom of the **Appraiser Profile** section of the **Sign Up & Profile** page. If a user clicks **Reset Appraiser Profiles to Global**, this will eliminate any instance in a platform-version where an appraiser's FHA roster status is being managed at the vendor profile level.

In other words, if the **Automatic FHA Roster Management** setting is **Enabled**, and **Reset Appraiser Profiles to**

Global has been clicked, Appraisal Scope will make no exceptions for any vendor profile configuration and will automatically manage the FHA roster status for all vendors.

DASHBOARD

The **Dashboard** setting options pertain to the elements that will be visible to AMC staff users and client users from their respective Appraisal Scope platform-interfaces, as well as to certain rules that will control other visual elements on those platform-interfaces. These options can be accessed by clicking **Dashboard** in the left-hand navigation menu.

Note regarding platform-interface terminology: When the tooltips related to these setting options refer to the dashboard, they are referring to the views accessible via the **Dashboard** tab on the main tab menu.

Dashboard View Settings

Configuring the *Staff dropdown should display* setting

Although the tooltip and drop-down box are fairly self-explanatory for this setting, it's important to recall that AMC staff users are divided into subtypes, depending on the roles they fill within the AMC. Users will either be staff users or reviewers. So, when **Only users of the same type** is selected from the drop-down box associated with the **Staff dropdown should display** setting, staff users will then afterwards see other staff users in the **Staff** drop-down list, and reviewers will see other reviewers.

Note regarding the *Highlight orders with a balance due in the New queue in the Dashboard in green* setting

Note: This feature is in the process of being updated.

Configuring the *Clear UCDP tab* setting

When the **Clear UCDP tab** setting is **Enabled**, Appraisal Scope will clear the information under the **UCDP** tab a set number of days after submission. An admin user will need to set the number of days in the **Days after submission date** text box to the right of the setting.

Configuring the *Display priority flag in Appraiser view* setting

An AMC can turn a priority flag on to be displayed in the **Main Dashboard** in association with any order (see [Priority \(On/Off\)](#) section for further details regarding priority flags). The **Display Priority flag in Appraiser view** setting, when **Enabled**, allows a vendor user to see the **Red exclamation** icon from their platform-interface when an AMC has turned the flag on for an order assigned to that vendor user.

Configuring the *Display an alert when users first log on* setting

The **Display an alert when users first log on** setting allows AMCs to create alert messages that Appraisal Scope will display to all users of their platform-version—staff users, client users, and vendor users. To set this up, an admin user will select **Enabled** in the drop-down box and then click **Configure Alert**. When the **Set Display an alert when users first log on** box pops up, they can use the text editor to type and style their message.

This setting can be useful for posting things like holiday notices, new regulations, or general company information.

Configuring the *Custom Order Flags* setting

The **Configuring Custom order flags** setting refers to the colored flags that can be used to distinguish certain order types from others. Once configured, these flags can be selected from the profile pane associated with an order. The flags will appear alongside order details in the **Flags** column of the status list views accessible from the **Dashboard** tab. By default, an AMC's platform-version will have no custom flags available until the AMC configures these flags.

1. From the **Options** page, click **Dashboard** in the left-hand navigation menu.
2. Locate the **Custom Order Flags** setting at the bottom of the page, and click **Configure** to the right of it. The **Flag Configuration** dialog box will open.
3. First, enter a category of order that you'd like to associate with a flag in the **Add New Custom Flag** box.
4. Next, point and click over the grayed-out box to the left of **Add**. Select a color using the color control panel that pops up.
5. Once you've chosen your color, click **Add**.
6. All flags created here will be accessible from the **Flag** list and can be edited or deleted at any time by accessing the **Flag Configuration** box.
7. Click **Close** when you're finished.

ORDER FORM

The **Order Form** options pertain to elements that can be utilized to customize the new-appraisal order form within an AMC's platform-version. These options can be accessed by clicking **Order Form** in the left-hand navigation menu.

New Appraisal Order Form

Configuring the *Configure automatic due date assignment* setting

The **Configure automatic due date assignment** setting allows AMCs to configure Appraisal Scope to set due dates a certain number of days from the date of an order based on *jobtype or intended use*. AMCs can also allow client users to have due date editing capabilities by selecting **Editable for Client** from the drop-down list associated with this setting. To further configure the **automatic due date assignment** setting, an admin user can use the following procedures.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Configure automatic due date assignment** setting near the top of the settings list, and click **Configure** to the right of it. The **Set Days for Auto Fill Due Date on Appraisal Form** dialog box will open.
3. Note the **Jobtypes** and **Intended Use** tabs near the top of the box. To configure this setting based on jobtype, the **Jobtypes** tab should be selected.
4. For each jobtype displayed in the list, first select whether Appraisal Scope should autofill the due date on the associated appraisal form by location, meaning that the due date on the form will only be autofilled when a subject property is in a particular location.
5. To configure Appraisal Scope to autofill by location for a particular jobtype, select **Auto Fill by Location** in the **Method** drop-down box associated with that jobtype. Next, click **Set By Location** to the right of the entry.
6. First, find the states that you want to serve as locations, and for each state, set the number of days out from order placement you want the due date to be set. If you want to further narrow these locations, click **Edit** under **Set by County**, choose your counties, and then enter the number of days. You can also set locations by zip code by clicking **Edit** under **Set by Zip** and making your choices in this same fashion.
7. To configure Appraisal Scope to simply autofill by jobtype, make sure **Auto Fill** is selected for each relevant jobtype and enter the number of days out from order placement you want the due date to be set in the **Days** column.
8. To configure Appraisal Scope to autofill by intended use, first click the **Intended Use** tab near the top of the box.
9. You can make the same choices regarding whether to have Appraisal Scope autofill by location or not, and use the same procedures as those detailed in the previous steps to configure this setting by intended use.
10. If you want Appraisal Scope to exclude weekend days in its calculation of due date, select the **Exclude weekend days** check box in the top left-hand corner of the **Set Days for Auto Fill Due Date on Appraisal Form** box.
11. When you've finished making all of your selections, click **Save**.

Configuring the *Customize the Loan Type field* setting

The **Customize the Loan Type field** setting allows AMCs to choose, first, whether the **Loan Type** field will be required, optional, or not included at all in a new order form. To choose, an admin user will click the drop-down box associated with this setting and select **Required**, **Optional**, or **Disabled**.

If **Required** or **Optional** is selected, an admin user can customize the loan types that will be made available to ordering client users in the **Loan Type** drop-down list on the new order form. An admin user can use the following procedures to configure this drop-down list.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Customize the Loan Type field** setting in the settings list, and click **Configure** to the right of it. The **Loan Type** dialog box will open.
3. To add loan types that aren't part of the **Loan Type** list found here, enter the loan type in the **Add New Type** text box and click **Add**. Any new type added will appear in the list and will automatically be selected for inclusion in the **Loan Type** drop-down list in the new order form. These new types can be edited or deleted at any time moving forward using the **Edit** and **Delete** options pertinent to this new entry.
4. In general, the check box associated with each loan type will determine whether that loan type appears in the **Loan Type** drop-down list in the new order form. To include a loan type, make sure its associated check box is selected. To keep a loan type out of the drop-down list on the new order form, make sure its associated check box is empty, and if it's not, clear it by clicking the check box.
5. When you're finished configuring this setting, click **Close**.

Configuring the *Customize the Intended Use field* setting

The **Customize the Intended Use field** setting allows AMCs to customize the **Intended Use** drop-down list that will be available on the new order form to ordering client users. To configure this setting, an admin user can use the following procedures.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Customize the Intended Use field** setting in the settings list, and click **Configure** to the right of it. The **Intended Use** dialog box will open.
3. The text in the **Intended Use** drop-down box, at the top left of the dialog box, will read **Non Commercial**. This means that when non-commercial appraisals are being ordered, the list of intended uses visible in the **Intended Use** dialog box will match up with the **Intended Use** drop-down list of the new order form.
4. To add an intended use that will appear in the **Intended Use** drop-down list of the new order form for non-commercial appraisals, keep the **Intended Use** drop-down box in the dialog box at **Non Commercial**, and enter a new intended use in the **Add New Intended Use** text box. Then, click **Add**.
5. To see the intended uses that will appear for commercial appraisal orders, first click the **Intended Use** drop-down box in the top left of the dialog box and select **Commercial**. When commercial appraisals are being ordered, the list of intended uses now visible in the dialog box will match up with the **Intended Use** drop-down list of the new order form.
6. To add an intended use that will appear in the **Intended Use** drop-down list of the new order form for commercial appraisals, enter an intended use in the **Add New Intended Use** text box, and click **Add**.
7. When you're finished configuring this setting, click **Close**.

Configuring the *Customize the Property Type Field* setting

The **Customize the Property Type Field** setting allows AMCs to choose, first, whether the **Property Types** field will be required, optional, or not included at all in a new order form. To choose, an admin user will click the drop-down box associated with this setting and select **Required**, **Optional**, or **Disabled**.

If **Required** or **Optional** is selected, an admin user can customize the property types that will be made available to ordering client users in the **Property Types** drop-down list on the new order form. An admin user can use the following procedures to configure this drop-down list.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Customize the Property Type Field** setting in the settings list, and click **Configure** to the right of it. The **Property Type** dialog box will open.
3. The text in the **Property Type** drop-down box, at the top left of the dialog box, will read **Non Commercial**. This means that when non-commercial appraisals are being ordered, the list of property types visible in the **Property Types** dialog box will match up with the **Property Types** drop-down list of the new order form.
4. To add a property type, keep the **Property Type** drop-down box in the dialog box at **Non Commercial**, and enter a new property type in the **Add New Type** text box. Then, click **Add**.
5. To see the Property Types that will appear for commercial appraisal orders, first click the **Property Type** drop-down box in the top left of the dialog box and select **Commercial**.
6. To add a Property Type for commercial appraisals, enter a Property Type in the **Add New Type** text box, and click **Add**.
7. Any new Property Types added for either non-commercial or commercial appraisals will appear as entries in the **Property Type** dialog box and will automatically be selected for inclusion in the **Property Types** drop-down list in the new order form.
8. In general, the check box associated with each property type, both non-commercial and commercial, will determine whether that property type appears in the **Property Types** drop-down list in the new order form. To include a property type, make sure its associated check box is selected. To keep a property type out of the drop-down list on the new order form, make sure its associated check box is empty, and if it's not, clear it by clicking the check box.
9. A selection made in the **Default** column of the **Property Type** dialog box will control which property type appears by default in the **Property Types** field of the new order form. You will need to make a default selection for both non-commercial and commercial property types by clicking on the option relevant to the property type you want to serve as default.
10. When you're finished configuring this setting, click **Close**.

Configuring the *Customize the Property Characteristics field* setting

The **Customize the Property Characteristics** field setting allows AMCs to choose, first, whether the **Property Characteristics** field will be required, optional, or not included at all in a new order form. To choose, an admin user will click the drop-down box associated with this setting and select **Required**, **Optional**, or **Disabled**.

If **Required** or **Optional** is selected, an admin user can customize the property characteristics that will be made available to ordering client users in the **Property Characteristics** drop-down list on the new order form. An admin user can use the following procedures to configure this drop-down list.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Customize the Property Characteristics field** setting in the settings list, and click **Configure** to the right of it. The **Property Characteristics** dialog box will open.
3. To add Property Characteristics that aren't part of the list found here, enter the new property characteristic in the **Add New Type** text box and click **Add**. Any new type added will appear in the list and will automatically be selected for inclusion in the **Property Characteristics** drop-down list in the order form. Any entry in the **Property Characteristics** dialog box can be edited or deleted at any time using the **Edit** and **Delete** options specific to the entry.

4. In general, the check box associated with each Property Characteristic will determine whether that characteristic appears in the **Property Characteristics** drop-down list on the order form. To include a Property Characteristic, make sure its associated check box is selected. To keep a Property Characteristic out of the drop-down list on the order form, make sure its associated check box is empty, and if it's not, clear it by clicking the check box.
5. When you're finished configuring this setting, click **Close**.

Configuring the **Customize the Occupancy field** setting

The **Customize the Occupancy field** setting allows AMCs to choose, first, whether the **Occupancy** field will be required, optional, or not included at all in a new order form. To choose, an admin user will click the drop-down box associated with this setting and select **Required**, **Optional**, or **Disabled**.

If **Required** or **Optional** is selected, an admin user can customize the options that will be made available to ordering client users in the **Occupancy** drop-down list on the new order form. An admin user can use the following procedures to configure this drop-down list.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Customize the Occupancy** field setting in the settings list, and click **Configure** to the right of it. The **Occupancy Type** dialog box will open.
3. To add occupancy type options that aren't part of the list found here, enter the new options in the **Add New Occupancy Type** text box and click **Add**. Any new type added will appear in the list and will automatically be selected for inclusion in the **Occupancy** drop-down list in the order form. Any entry in the **Occupancy Type** dialog box can be edited or deleted at any time using the **Edit** and **Delete** options specific to the entry.
4. In general, the check box associated with each occupancy type will determine whether that type appears in the **Occupancy** drop-down list on the order form. To include an occupancy type, make sure its associated check box is selected. To keep an occupancy type out of the drop-down list on the new order form, make sure its associated check box is empty, and if it's not, clear it by clicking the check box.
5. Making a selection in the **Default** column in the **Occupancy Type** dialog box will control which occupancy type appears by default in the **Occupancy** field of the order form. You will need to make a default selection by clicking on the option relevant to the occupancy type you want to serve as default.
6. When you're finished configuring this setting, click **Close**.

Configuring the setting **Automatically e-mail the "best contact" on the order to schedule the inspection time**

The **Automatically e-mail the "best contact" on the order to schedule the inspection time** setting can be used when an AMC wants Appraisal Scope to automatically send an email to a contact person when certain jobtypes are ordered. The contact person who receives the email will be established when selected in the order form from the **Who is the best person to contact?** drop-down list. The ordering party will also need to have provided an email address for that contact on the order form in the **Enter Borrower's Email To Expedite Scheduling** text box.

If this setting is **Enabled**, an admin user can use the following procedures for configuration.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Automatically e-mail the "best contact" on the order to schedule the inspection time** setting in the settings list, and click **Configure** to the right of it. The **Select Jobtype** dialog box will open.
3. Select the check box associated with each jobtype that will trigger the automatic email when ordered.
4. After all selections have been made, click **Submit**.

Configuring the *Display warning to client/Admin* setting

The **Display warning to client/Admin** setting can be used when an AMC needs to provide warning information specific to a state, county, or zip-code to an ordering client user. The information will display on the screen in the order form for a property location meeting the criteria set by the AMC.

If this setting is **Enabled**, an admin user can use the following procedures for configuration.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Display warning to client/Admin** setting in the settings list, and click **Configure** to the right of it. The **Custom Warning** dialog box will open.
3. First, add the title you'd like to accompany your warning message in the **Warning Title** text box, and then type out the body of the message in the **Warning Message** text box.
4. Next, choose the state that this message will pertain to by clicking the **State** drop-down list and clicking on the relevant state.
5. This will add an entry for the message that you've created, associated with the chosen state, at the bottom of the **Custom Warning** box. An entry can be deleted at any time from the **Custom Warning** dialog box by clicking **X**.
6. By default, the new entry will include all counties within the state, but it can be refined by removing counties to which the warning will not apply, and also by refining certain counties by zip code.
7. To refine the entry further, first click **Edit** in the **Action** column. This will open the **Custom Warning – state abbrev Counties** dialog box.
8. You can edit the title of the message or the message itself from this dialog box, and you can remove any counties from the entry by clearing the check boxes associated with those counties.
9. If you want to refine a county further by zip code, click **zip** next to that county name, and clear the check boxes associated with any zip codes to which your warning message will not apply. Click **Back** when you're finished.
10. When you've finished editing your message, click **Update**.

Configuring the *Set Rush Order status automatically based on jobtype* setting

The **Set Rush Order status automatically based on jobtype** setting can be used when an AMC wants to attach a rush status to a particular jobtype in all cases where that jobtype is ordered.

If this setting is **Enabled**, an admin user can use the following procedures for configuration.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **Set Rush Order status automatically based on jobtype** setting in the settings list, and click **Configure** to the right of it. The **Customize Rush Order Job Types** dialog box will open.
3. Select the check box associated with each jobtype that will trigger the automatic status setting when ordered.
4. After all selections have been made, click **Save**.

Configuring the *For API order placement, filter JobTypes based on Loan Type* setting

The **For API order placement, filter JobTypes based on Loan Type** setting gives AMCs the ability to determine the jobtype that is displayed when an order is placed for a given loan type via direct integration.

Note: This option is currently only available for orders placed via direct integration.

If this setting is **Enabled**, an admin user can use the following procedures for configuration.

1. From the **Options** page, click **Order Form** in the left-hand navigation menu.
2. Locate the **For API order placement, filter JobTypes based on Loan Type** setting in the settings list, and click **Configure** to the right of it. The **Configure JobTypes per Loan Type** dialog box will open.
3. Each individual loan type listed in this dialog box will need to be configured individually.

4. First, click **Configure** to the right of the loan type you're configuring. The **Select available JobTypes for loan type** dialog box will open.
5. Select each jobtype that will display as available when an order is placed for this loan type. Click **Save** when you're finished.
6. After each loan type has been configured, click **Close**.

Note regarding the *Require Processor* setting

Note: The **Require Processor** field can only be used with integrated orders.

Configuring the *Default Approaches To Be Included (Commercial)* setting

The **Default Approaches To Be Included (Commercial)** setting gives AMCs the option to set default values for approaches by Income, Sales, and/or Cost. To set these default values, an admin user will click **Configure**, and in the **Approaches to be included** dialog box, select the check boxes associated with the options they want to choose.

Note: This setting only applies to orders for jobtypes that have been configured as Commercial.

PAYMENT FORM

The **Payment Form** options allow AMCs to decide how Appraisal Scope should handle payments and the information pertaining to payments. These options can be accessed by clicking **Payment Form** in the left-hand navigation menu.

Payment Handling Settings

Configuring the *Require users to agree to Payment Terms & Conditions* setting

The **Require users to agree to Payment Terms & Conditions** setting allows AMCs to make it mandatory that users agree to terms before a payment is made. If this setting is **Enabled**, an admin user can use the following procedures for configuration.

1. From the **Options** page, click **Payment Form** in the left-hand navigation menu.
2. Locate the **Require users to agree to Payment Terms & Conditions** setting in the settings list, and click **Configure** to the right of it. The **Set Terms and Conditions on client payment disclaimer** dialog box will open.
3. Use the text editor in the dialog box to type and style the *Terms & Conditions* message.
4. After you've finished, click **Save**.

DOCUMENTS

The **Documents** options allow AMCs to establish certain appraisal-document handling specifications in Appraisal Scope. The **Documents** options can be accessed by clicking **Documents** in the left-hand navigation menu.

Document Management

Configuring the *Set Additional Document visibility* setting

The **Set Additional Document visibility** setting gives an AMC options to decide how they want Appraisal Scope to handle the permissions regarding who can see additional documents. An AMC can choose to treat all additional documents the same, and choose a default option that will determine who can see these additional documents. They can also decide to treat certain documents in a custom manner, making these documents available to client users and/or vendor users.

A third option is made possible by the precedence given to invoice, SSR, and QC related documents. These documents can be treated in a custom manner, and regardless of the default options that are then chosen to handle all other documents, the custom settings for these documents will take precedence, and they will be

handled according to their custom configurations. An admin user can follow the following procedures to customize the **Set Additional Document visibility** setting.

1. From the **Options** page, click **Documents** in the left-hand navigation menu.
2. Locate the **Set Additional Document visibility** setting in the settings list, and click on the drop-down list to the right. Select **Set Custom Document Permissions** from this list.
3. Next, click **Configure**, directly beneath the drop-down box. The **Additional Document Custom Permissions** dialog box will open.
4. Select the check boxes associated with the individual documents to be customized under the **Display to Appraiser** and/or **Display to Client** columns, depending on who you want to be able to see these documents.
5. After you've finished your configurations, click **Save**.

UNPAID ORDERS

The **Unpaid Orders** options allow AMC's to choose how unpaid orders are handled in Appraisal Scope. These options can be accessed by clicking **Unpaid Orders** in the left-hand navigation menu.

INTEGRATIONS

The **Integrations** options provide the tools to configure integrations with Mercury Network, CoreLogic CMS, Encompass, Platinum Data Solutions, Collateral Analytics, and/or Google Search. These configurations will enable an AMC's Appraisal Scope platform-version to operate seamlessly when integrated with one or more of these other systems.

Configuring integrations consists mainly of matching Appraisal Scope terminology specific to loans and appraisals with the terminology specific to the systems to be integrated with. An AMC interested in integrating their platform-version with another system should contact Appraisal Scope customer support.

ORDER DETAILS

The **Order Details** options allow AMC's to control the visibility of information, both appraisal-specific and administrative, that's related to orders managed in Appraisal Scope. These options can be accessed by clicking **Order Details** in the left-hand navigation menu.

Order Details Settings

Configuring the *Enable Reviewer, Supervisor, and Admin fees* setting

The **Enable Reviewer, Supervisor, and Admin fees** setting allows an AMC to configure these additional fees to appear on their invoices. An admin user can perform this configuration by clicking **Configure**, selecting the appropriate check box in the **Select Additional Items For Invoices** dialog box, and clicking **Save**.

Configuring the *Notification Log row highlighting* setting

The **Notification Log row highlighting** setting allows an AMC to configure multiple color-coded labels that can then be applied to rows in the Notification Log. When this setting is enabled, an admin user can use the following procedures to create these labels.

1. From the **Options** page, click **Order Details** in the left-hand navigation menu.
2. Locate the **Notification Log row highlighting** setting in the settings list, and click **Configure** to the right of it. The **Notification Log Row Highlighting Configuration** dialog box will open.
3. First, name the colored label you're going to create in the **Add new highlight type** text box.
4. To set the color, move your cursor to the shaded box to the right of the text box and click there. When the color selector opens, use the controls to choose the color you want to associate with the label.

5. Click **Add**, and the new label will appear in a list inside the **Notification Log Row Highlighting Configuration** dialog box. Entries you create and add to this list can be edited or deleted at any time by clicking **Edit** or **Delete** in the **Action** column.
6. When you're finished making your selections, click **Close**.

Configuring the **Order Classifications** setting

A list of classifications can be created or added to from the **Order Classifications** setting. This list of classifications configured here at the global level will provide all of the classification options available to apply to an individual client company from a client company profile.

To create or add to a list, an admin user will click **Configure** to the right of the toggle switch associated with the **Order Classifications** setting. They will then add any order classifications by typing them into the text box and clicking **Add**. The **Order Classifications** list will be available to change as needed from this location moving forward, which can be accomplished by clicking **Edit** or **Delete** in the **Action** field associated with the classification that needs to be changed or deleted.

APPRAISER ASSIGNMENT

The **Appraiser Assignment** options provide choices that will impact how Appraisal Scope assigns orders, the way that AMC staff users will assign orders for manual assignments, and more broadly, how Appraisal Scope will manage an AMC's relationships with its vendor users. The settings here can dictate the requirements for AMC staff users, the type of information that is visible to appraisers, and the way that fees are calculated and applied. These settings can be accessed by clicking **Appraiser Assignment** in the left-hand navigation menu.

Appraiser Assignment Settings

Configuring the **Limit the number of assignments per Appraiser by enabling Max Order field in their profile** setting

The **Limit the number of assignments per Appraiser by enabling Max Order field in their profile** setting allows an AMC to make a **Max Order** field available on the **Edit** page of a vendor user's profile. When the setting is enabled, this field will allow admin users to set a maximum limit on the order assignments given to any single appraiser. An admin user can configure this setting further by following the following procedures.

1. From the **Options** page, click **Appraiser Assignment** in the left-hand navigation menu.
2. Locate the **Limit the number of assignments per Appraiser by enabling Max Order field in their profile** setting in the settings list, and click **Configure** to the right of it. The **Appraiser Max Order** dialog box will open.
3. To set a default limit on orders that will pre-populate the **Max Order** field at the vendor user level, enter a number in the **Set Max Order Default** box and click **Apply to All**.
4. To set Appraisal Scope to hard stop or to provide a warning that a vendor user has been assigned the maximum number of orders, click the **Set Hard Stop or Warning** drop-down box and choose one of the options available from the list.
5. When you're finished configuring the setting, click **Close**.

BID REQUESTS

The **Bid Requests** options allow an AMC to make bidding on order assignments available, and to require that an appraiser disclose recent history with a property as part of the bidding process. These settings can be accessed by clicking **Bid Requests** in the left-hand navigation menu.

SCHEDULE & DUE DATE LIMITS

The Appraiser Scheduling/Due Date Limit options allow an AMC to set the rules around how various deadlines related to an appraisal are set. These settings can be accessed by clicking **Schedule & Due Date Limits** in the left-hand navigation menu.

UPDATES

The **Updates** options allow AMC's to choose how they want to communicate certain order statuses to clients and appraisers. These settings can be accessed by clicking **Updates** in the left-hand navigation menu.

QUALITY CONTROL

The **Quality Control** options give an AMC the ability to control certain aspects pertaining to QC review in their Appraisal Scope platform version. These settings can be accessed by clicking **Quality Control** in the left-hand navigation menu.

REVISIONS

The **Revisions** options help AMC's to manage their Revision and Reconsideration of Value workflows. AMC's can also customize the Reconsideration of Value disclosure statement and select options as to who their platform-version will notify and what additional materials it will provide when revisions are sent. These settings can be accessed by clicking **Revisions** in the left-hand navigation menu.

Revision Requests and Reconsideration of Value Settings

Configuring the *Configure Revision Types* setting

A staff user can expand review types in their AMC's platform-version beyond the Appraisal Scope default Reviewer and Underwriter revision types. To do this, they will first click **Configure** next to the **Configure Revision Types** setting. When the **Revision Type** dialog box opens, the user will enter the new revision type, stipulate it **As Client Revision** or **As Reviewer Revision**, and then click **Add**. New revision types will be available to edit from this same location.

Customizing the *Reconsideration of Value disclosure statement* setting

An AMC can customize the disclosure statement that appears to a client user when that user requests a Reconsideration of Value. To do this, a staff user will first click **Configure** next to the **Customizing the Reconsideration of Value disclosure statement** setting. Using the text editor in the **Reconsideration of value disclosure** dialog box, the user can alter the default disclosure statement and click **Save**.

Configuring the *Customize Revision Request (QC Review)* setting

An AMC can customize the text of the request sent to an appraiser when a revision is requested. To do this, a staff user will first click **Configure** next to the **Customize Revision Request (QC Review)** setting. Using the text editor in the **Customize Revision Request (QC Review)** dialog box, the user can alter the text of the request and click **Save**.

Configuring the *Revision Codes* setting

An AMC can configure revision codes to select from when submitting revision requests. To do this, a staff user will first need to make sure that the drop-down box associated with the **Revision Codes** setting is set to **Enabled**, and then they will click **Configure** to the right of the drop-down box. In the **Revision Codes** dialog box, the user can add codes and descriptions of these codes that will then be available to choose from when a revision is being requested, as long as the **Revision Codes** setting is **Enabled**. Codes created here will be available to edit or delete from this same location.

REPORTING

The **Reporting** options give AMC's choices as to if and when they will have Appraisal Scope send reports containing performance data to appraisers. These settings can be accessed by clicking **Reporting** in the left-hand navigation menu.

VENDOR MANAGEMENT

The **Vendor Management** tab provides an option to control whether a vendor user will have access to the **Accounting** tab from their platform-interface. This setting can be accessed by clicking **Vendor Management** in the left-hand navigation menu.

AMC Configuration

When a staff user clicks **AMC Configuration**, the **AMC Configuration** table opens. AMCs can supply a variety of pertinent details regarding their state licenses through this table. Staff users can also configure through this table specific choices about what the AMC will display on invoices and what information they let vendor users and client companies see.

The following sections provide procedures and other information regarding configuration tasks carried out through the **AMC Configuration** table.

Entering a license number and expiration date

1. First, locate the entry for the state associated with the license.
2. Click the **Pencil and Notepad** icon in the **Edit** field associated with the state, and the **License #** and **Expiration Date** columns will expand, revealing text boxes.
3. Type the license number and expiration date for the license into the text boxes.
4. Click **Save** in the **Edit** field.

Upload license documents

1. To upload license documents, first locate the entry for the state associated with the license.
2. click the **Upload** icon in the **License Document** field associated with the state.
3. Next, click **Select File** in the **Upload License Docs** dialog box, choose the files from your local directory, and click **Open**.
4. The documents will afterward be available in the **License Document** field associated with that state, and they can be deleted at any time by clicking the **Delete** icon.

DBA

1. To enter Doing Business As (DBA) information, first locate the entry associated with the relevant state.
2. Click the **Pencil and Notepad** icon in the **DBA** field associated with the state.
3. When the **Set DBA** dialog box opens, enter the relevant information into all applicable text fields.
4. To enable the DBA information, select the **Enabled** check box.
5. Before exiting, click **Submit**.

Note: Enabling the DBA configuration for a given state instructs Appraisal Scope to display a DBA name to an appraiser assigned an order pertinent to that state. The DBA name is displayed in place of the AMC's primary name.

Include Appraiser Name on Invoice

When the **Include Appraiser Name On Invoice** check box is selected for a state, appraiser names will appear on client invoices for jobs completed in that state.

Display License and Display Expiration Date

When the **Display License** and **Display Expiration Date** check boxes are selected for a state, the AMC license and license expiration date will display for relevant client users on their platform-interface. The data will be visible on the **Details** page of an order record. To select these settings for all states, select the check boxes in the column headers.

Note: The Display License setting must be selected for the Display Expiration Date setting to be available.

Display Client Fee to Appraiser

Staff users can choose whether they will display client fees to appraisers by state or not. When Appraisal Scope is configured to display client fees to appraisers, the relevant vendor users will be able to see these fees from the **Details** tab of their platform-interface.

To configure this setting, a staff user will find the states that they want the setting to apply to, and click the associated drop-down boxes in the **Display Client Fee to Appraiser** column. Alternatively, if the staff user wants the same setting to apply to all states and territories, they will click **Set All** in the column header and select the setting from the **Set all states** to box.

In either case, in the drop-down list, selecting **Commercial Assignment Only** will restrict the setting to displaying client fees for commercial orders. Selecting **Residential Assignments Only** will restrict the setting to apply only to residential orders. Selecting **Both** will make client fees visible for both commercial and residential orders. Selecting **Neither** will mean the client fees remain hidden.

Display Appraiser Fee to Client

Staff users can choose whether they will display appraiser fees to clients or not in any of the listed states and territories. If Appraisal Scope is configured to display appraiser fees to clients, appraiser fees will be visible to clients for orders with subject properties that fall within the state or territory subject to the setting. When the appraiser fees are visible, a client user can see the information from the **Details** tab of their platform-interface, as well as on the invoice for the order.

To configure this setting, a staff user will find the states that they want the setting to apply to, and click the associated drop-down boxes in the **Display Appraiser Fee To Client** column. Alternatively, if the staff user wants the same setting to apply to all states and territories, they will click **Set All** in the column header and select the setting from the **Set all states to** box.

In either case, in the drop-down list, selecting **Commercial Assignment Only** will restrict the setting to displaying appraiser fees for commercial orders. Selecting **Residential Assignments Only** will restrict the setting to apply only to residential orders. Selecting **Both** will make appraiser fees visible for both commercial and residential orders. Selecting **Neither** will mean the appraiser fees remain hidden.

Adding notes

1. To add notes to be kept for internal use, first click the **Notes** icon from the **Notes** field associated with the relevant state.
2. When the **Add Notes:** box opens, click **Add Notes** in the upper right-hand corner.
3. Next, type up the notes in the text editor and set the styles you prefer using the text editor options available.
4. When you're finished, click **Save**.
5. These notes will be accessible from that point on in individual boxes by clicking the **Notes** icon associated with the applicable state. The notes can be edited from their respective boxes by clicking the **Edit** icon in the header of the box and changing the text in the text editor that displays, or they can be deleted by clicking the **Delete** icon in the header of the box.

QC Review–Settings menu

The **QC Review** tab gives an AMC access to tools for creating and customizing checklists applicable to their Quality Control (QC) review process. Admin users can create new QC checklists and RCR QC checklists for manual reviews, and customize system-generated checklists for automated reviews. The following information will detail the procedures used to complete these tasks.

Appraisal Manual Checklist

CREATING CHECKLIST

To create a new manual checklist, an admin user will first click **Appraisal Manual Checklist**, type the name for the new checklist in the **QC Review Name** text field, and click **Save**. This newly created checklist will now be visible as an entry in the **Manual Checklist** list, located directly beneath the **QC Review Name** text field. To begin building the checklist, the user will proceed to the row in the **Manual Checklist** list occupied by the new checklist entry, and they'll click the **Edit** icon in the **Action** field associated with that row.

Admin users can create manual checklists by choosing from the building blocks available on this editing page. These building blocks are available in the **Add Element** list. The following sections detail the options available when a user clicks the **Add Element** box.

Note: A user can change a checklist name at any time by clicking the **Edit** icon next to the checklist name, changing the name in the **Update Form Name** text field, and clicking **Submit**.

Title

The **Title** element is available for users who want to give their checklist a title. To add this element, a user will click **Title** and then **Generate**, and this will open the **Add Title** dialog box. Here, they'll enter the title into the text field and click **Submit**. The **Title** element will now appear on the page.

Note: **Delete** and **Edit** icons are available to the left of the **Title** element and can be used to eliminate or change the title.

Text Box

The **Text Box** element allows users to provide a text box on their checklist labeled to reflect the type of information they want to collect in this text box. For example, if the year a property was built is information they'd like to collect, an admin user can label the text box as **Year Built**. The appraiser would then enter the information into the text box when filling out the checklist.

To add this element, a user will click **Text Box** and then **Generate**, and this will open the **Add Textbox Element** dialog box. The user will then enter the label that they want to accompany this text box in the **Enter Textbox label** text box and click **Submit**.

Text Area

The **Text Area** element allows users to provide a text box on their checklist where long-form answers or information can be gathered. To add this element, a user will click **Text Area** and then **Generate**, and this will open the **Add Textarea Element** dialog box. The user will then enter the label that they want to accompany this text box in the **Enter Textarea label** text box and click **Submit**.

QC Question

The **QC Question** element allows users to put questions on their checklist that are answerable by selecting **Yes**, **No**, or **N/A** radio buttons. A text box is also generated with this element that will accompany the question so that long-form answers or details pertaining to the radio button selections can be provided. To add this element, a user will click **QC Question** and then **Generate**, and this will open the **Add Que** dialog box.

An admin user should type the question answerable by radio button or long form in the **Enter Question** text box and then click **Submit**. This will automatically generate the Yes, No, and N/A radio buttons along with the text box.

Dropdown List

The **Dropdown List** element is available for users who want to provide a menu of options available to be chosen in their checklist. To add this element, a user will click **Dropdown List** and then **Generate**, and this will open the **Add Select Element** dialog box.

An admin user should type a question answerable by selection from a menu of options into the **Enter Combo Box Label** text box. Next, a user will type the first menu option they want to provide in the **Option 1** text box. Then, they will click the **Add More Options** icon to introduce an **Option 2** text box, where the second menu option will be entered. This process can be repeated to introduce as many menu options as required. When all menu options have been created, the user will click **Submit**.

Note: A user can delete options from the **Dropdown List** element in the **Add Select Element** dialog box by clicking the **Delete** icon to the right of the **Option** text boxes.

Check box List

The **Check box List** element is available for users who want to provide question-answer options to their checklist that are selectable by check box. To add this element, a user will click **Check box List** and then **Generate**, and this will open the **Add Check box Element** dialog box.

An admin user should type the question answerable by check box selection in the **Enter Check box Group Label** text box. Next, a user will type the first answer option they want to provide in the **Check box 1** text box. Then, they will click the **Add More Elements** icon to introduce a **Check box 2** text box, where the second answer option will be entered. This process can be repeated to introduce as many answer options as required. When all selection options have been created, the user will click **Submit**.

Note: A user can delete options from the **Check box List** element in the **Add Check box Element** dialog box by clicking the **Delete** icon to the right of the **Check box** text boxes.

Radio Button

The **Radio Button** element is available for users who want to provide question-answer options to their checklist that are selectable by radio button. To add this element, a user will click **Radio Button** and then **Generate**, and this will open the **Add Radio Element** dialog box.

An admin user should type the question answerable by radio button selection in the **Enter Radio Group Label** text box. Next, a user will type the first answer option they want to provide in the **Radio 1** text box. Then, they will click the **Add More Elements** icon to introduce a **Radio 2** text box, where the second answer option will be entered. This process can be repeated to introduce as many answer options as needed. When all options have been created, the user will click **Submit**.

Note: A user can delete radio buttons from the **Radio Button** element in the **Add Radio Element** dialog box by clicking the **Delete** icon to the right of the **Radio** text boxes.

Text Box (Auto Populated)

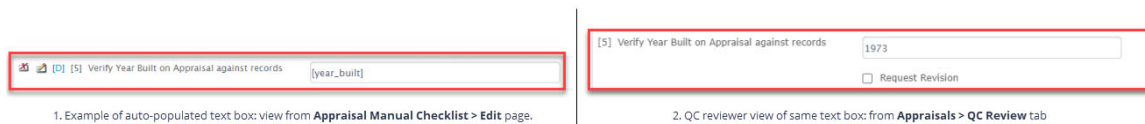
The **Text Box (Auto Populated)** element allows users to provide a text box on their checklist associated with a label that reflects the type of information they want to collect in this text box. For example, if the year a property was built is information they'd like to collect, an admin user can label the text box as **Year Built** and then configure it to auto-populate with this information. The information will be automatically pulled from the appraisal report, provided that the appraisal was delivered in a supported XML format.

The specific types of information available to have auto-populate in a manual checklist created here is limited to what is supported by current XML standards. Using the **Text Box (Auto Populated)** element in manual checklists created here, however, can provide support to reviewers by eliminating the need to manually check information contained in many fields commonly filled in on appraisal forms.

For each automated text box that will be added to a checklist, a user will click **Text Box (Auto Populated)** and then **Generate**, and this will open the **Add Auto Populated Textbox Element** box. The user will then enter a label that should accurately reflect the information that they want to be pulled in from an appraisal form in the **Enter Textbox label** field.

Next, they will click the **Select Appraisal data field name** box. The list that opens contains common fields referenced in the previous paragraph. The user will choose from these options the information type that they want to be pulled into this text box. When finished, they will click **Submit**.

For illustrative purposes, the following screenshots show an auto-populated text box. The image on the left is the view an admin user will have when adding an auto-populated textbox to a manual checklist. The image on the right is what the reviewer will see when using the checklist, after the information has been automatically pulled into this text box.



Note regarding editing and deleting checklist elements: Any element added to a checklist can be later edited or deleted by clicking the **Delete** or **Edit** icons on the left-hand side of the checklist element.

Note regarding checklist element numbering: The consecutive numbers accompanying the checklist elements can be disabled by clicking **[D]** on the left-hand side of the element. This will also toggle the display to read **[E]**. When the **[E]** is then clicked, the numbering will be re-enabled for that checklist element.

EDITING, CLONING, OR DELETING CHECKLIST

To edit an existing manual checklist, an admin user will proceed to the row in the **Manual Checklist** list occupied by the relevant checklist entry, and they'll click the **Edit** icon in the **Action** field associated with that row. This will display all of the elements pertaining to that checklist, and the procedures detailed under the Creating checklist section can be used to make changes to the checklist.

To clone an existing manual checklist, the user will proceed to the row in the **Manual Checklist** list occupied by the entry of the checklist they'd like to clone. They'll then click the **Clone** icon in the **Action** field associated with that row. This will open the cloned checklist, and the user can change the name of the checklist by clicking the **Edit** icon to the left of the checklist name, typing in the desired name for the cloned checklist, and clicking **Submit**. When the user then clicks **Close**, they will see an entry for the cloned checklist in the **Manual Checklist** list.

To delete an existing manual checklist, an admin user will proceed to the row in the **Manual Checklist** list occupied by the relevant checklist entry and click the **Delete** icon.

Appraisal Automated Checklist

The **Appraisal Automated Checklist** page gives AMCs a place to customize and assign QC checklists for automated reviews.



Caution: Rules used to build Appraisal Automated Checklists apply only to the Traditional 1004 and 1073 forms.

To access the page elements available to carry out these tasks, an admin user will first click **Appraisal Automated Checklist**. The automated checklists that are created here will be built from rules that are available as options on the **Appraisal Automated Checklist** page. The rules that an AMC uses will reflect the information that they want Appraisal Scope to look at when an automated review is run.

If during an AMC's automated QC review the valuation product fails, the system will display the details as to why it failed to a staff user. In cases where a valuation product fails an automated review run at the time a vendor user uploads it, the system will perform an action dictated by the checklist configuration (see Step 5 in the following procedures).

The checklist rules available to use in Appraisal Automated Checklists are broken into two categories: Common Rules and Uniform Appraisal Dataset (UAD) Rules (see *Please Note* following the paragraph). Any combination of these rules can be used to build an Appraisal Automated Checklist. Procedures for configuring and assigning these automated checklists follow.

Please Note: Although a third category, User Specific Rules, is currently visible on the **Appraisal Automated Checklist** page, these rules are no longer supported on the Appraisal Scope platform.

CREATING AN APPRAISAL AUTOMATED CHECKLIST

All automated checklists after they've been created will be available to view and edit by clicking in the **Rule List** box and choosing the applicable checklist there.

1. To create a new automated checklist from the **Appraisal Automated Checklist** page, click **Add New List** and type the desired list name in the **List Name** text field of the **Add New List** box. Then click **Save**.
2. To configure the automated checklist rules, clear the **Include in Report** check boxes associated with any rules that you do not want included on your checklist.
3. When you've finished, click **Set Rules**.
4. If you intend to configure the checklist to notify a vendor user of any failed rules when that user uploads a valuation product, and also intend that when these rules are violated the vendor user must correct the product before it can be uploaded again, select the **Hard Stop** check boxes associated with the rules you want to use for this purpose.
5. If you intend to configure the checklist to notify a vendor user of any failed rules when that user uploads a valuation product, but intend that when these rules are violated the vendor user will have the choice to correct the product or continue the upload, select the **Warning** check boxes associated with the rules you want to use for this purpose.
6. After you've configured the rules for the checklist, you can move on to assigning the list to clients.

ASSIGNING AN APPRAISAL AUTOMATED CHECKLIST

When an automated checklist is assigned to client Companies from the **Appraisal Automated Checklist** page, Appraisal Scope will automatically run the automated checklist against the Traditional 1004 and 1073 forms that vendor users upload for these client companies. To assign an automated checklist to client companies, an admin user will click **Assign Clients**. In the **Assign Clients** dialog box, a user will select the check boxes associated with the client companies they want to assign the checklist to and then click **Assign**.

The following screenshot shows where an automated checklist can be run within the **QC Review** tab.

The screenshot displays the 'QC Review' tab interface. At the top, there are navigation tabs: Order Details, Updates, Documents, Email Office, Notification Log, and QC Review (selected). Below these are action buttons: Complete, Clone, Priority (Off), Special Care (On), Add Appraisal Form, Print, Edit, and Assign. The interface is divided into three main sections:

- Manual:** A table with columns 'No.', 'Name', and 'Action'. It lists two items: '10 Point Checklist - Residential reports with XML' and 'Manual Commercial Review Checklist (WIP)'. Each item has a checkmark icon in the Action column.
- Automated:** A table with columns 'No.', 'Name', 'Date/Time', and 'Action'. It lists one item: 'sales_Kinney(2022-42)-V1.xml'. There is a checkmark icon in the Action column. A red arrow points to this icon with the text 'Click Action icon to run automatic checklist'.
- Third Party AVM and Review Products:** A section with buttons for 'Collateral Expert Order', 'PDS HVE Order', 'PDS OptVal Order', 'PDS RealCondition Order', 'PDS RealView (With Data) Order', and 'PDS R'. Below this is another table with columns 'No.', 'Name', and 'Date/Time', listing one item: 'RealView HTML'.

APPLYING RULE CATEGORIES

Rule categories allow AMCs to group rules on a checklist by how these rules relate to aspects of an appraisal form. For example, rules related to Subject fields in an appraisal form could each be assigned a Subject category. Then, when the automated QC review is run, the user would see the results related to the Subject fields grouped under that category, as follows.

The screenshot shows a 'Reviewed Report' window. At the top, there is a header 'Reviewed Report'. Below it, there is a section titled 'COMMON' with a sub-header '# Subject - Rules'. The table below lists three rules:

#	Subject - Rules
1	Client name is different than Ordered
2	Borrower name is different than Ordered
3	Property address is different than Ordered

1. To create these categories and assign them from the **Appraisal Automated Checklist** page, first click **Manage Category**. The **Manage Rule Category** dialog box will open.
2. Click **Add Category**, type the new category into the **Category Name** text field, and click **Save**. This category will now appear in the category list.
3. To assign these categories to individual rules, first click **Assign**.
4. Next, click the **Category** drop-down list and choose the category you want to assign. Now go down the rules list and select the check box associated with each rule you'd like to group under that category.
5. To change the list of rules you're choosing from, click the **Rule Type** drop-down list and select **Common Rules** or **UAD Rules**.
6. When you're finished making your selections, click **Assign Category**.

MAPPING JOBTYPES ON AN APPRAISAL AUTOMATED CHECKLIST

Users will find that this process of mapping jobtypes for an Appraisal Automated Checklist connects closely with the requirements outlined in the *Mapping fee schedule imports* section. To reiterate the information detailed there, an admin user should note that Appraisal Scope has its own list of jobtypes that correspond to appraisal forms. This list is pulled from a directory of standard appraisal forms.

An AMC must map the names that they give to their jobtypes in their Appraisal Scope platform-version to the corresponding appraisal forms in this standard directory, in cases where the names that they import differ from the standard names included in the directory. For the purposes of mapping the jobtypes on an

Appraisal Automated Checklist, AMCs are best served mapping their jobtypes in the way they did when creating their fee schedules.

Note: The **Job type Mapping** dialog box will include all standard appraisal forms included in the Appraisal Scope directory. Because the rules on this checklist will apply only to Traditional 1004 and 1073 forms, however, it is only necessary for an AMC to map the directory forms containing Traditional 1004 or 1073 information.

1. To map jobtypes on an **Appraisal Automated Checklist**, first click **Jobtype Mapping**.
2. The **Job type Mapping** dialog box will open. The list here displays the aforementioned standard directory forms.
3. Choose from this list a Traditional 1004 or 1073 **Directory Appraisal Form** in the left column that you have a matching jobtype for, and click Map to form type.
4. When the Map to form type dialog box opens, select the check box coinciding with the jobtype that matches that form and click Save.
5. Repeat this process for each Traditional 1004 or 1073 Directory Appraisal Form that you have a matching jobtype for, and when you've finished mapping each form, close the box.

Emails

The **Emails** tab gives an AMC access to tools for customizing email templates that Appraisal Scope will use to automatically generate email communications for a variety of purposes. The templates are categorized by their intended recipient or subject matter, for example email templates directed to clients or pertaining to an automated valuation model (AVM).

Email templates are built with content tags. Content tags can be identified by their placement within brackets (for example, **[signature]**). These content tags will draw information from forms filled out within a platform-version (e.g., order forms or application forms), from configurations set on other pages within a platform-version (e.g., Order Details), and from information saved in staff profiles.

All email templates can be customized using the following general procedures.

Customizing email templates

1. Choose a tab from the available categories on the **Emails** page, for instance **Clients** or **Admins**, and locate the email template that you want to modify.
2. Click the **Edit** icon in the row associated with that template to open that specific email template page.
3. You will see a text box for customizing the subject line of the email toward the top of the page and a text editor at the bottom of the page for customizing the body of the email. Each of these fields will display the default standardized text and content tags for that email template.
4. To add content tags to the subject line associated with the template, click the **Insert Tag** drop-down list beneath the **Subject** heading and then click on the tag that you want to add to the subject line.
5. To add content tags to the body of the email template, click the Insert Tag drop-down list under the **Body** heading and then click on the tag that you want to add.

Note: You can modify templates in multiple ways, including removing default content tags and text, or rearranging any email elements that you choose. You can at any time reset to its original default format a template to which previous modifications have been saved by clicking **Reset to Default**.

6. When you've finished customizing the template, click **Save**.

Instructions

The **Instructions** tab gives AMC's a location to manage specific directions and requirements pertaining to the jobtypes that are assigned to an appraiser. These instructions can include documents that are provided as standard practice, such as engagement letters, and they can also include client company-specific instructions that might convey requirements a client wants clarified for appraisers. The general purpose for making instructions available to an appraiser is so that they can better understand a valuation request.

Procedures for Instructions

The **Instructions** page is divided into the **Documents** and **Instruction Template For Client** lists. Documents and templates once uploaded or created will be available in an AMC's platform-version and accessible from either of these two lists.

UPLOADING AND MODIFYING CLIENT INSTRUCTION DOCUMENTS

1. To upload a new instruction document to the **Documents** list, first click **Add Document**.
2. Enter the title you want to give the instructions document in the **Document Title** text box and then click **Choose File**.
3. Find the file you want to upload from your local file directory and either double-click the file or click on it and then click **Open**.
4. The file directory will close, and you will see the file name to the right of **Choose File**. Now click **Save**, and the new document will appear in the **Documents** list.
5. For any document listed under **Documents**, you can access the text by clicking its title.
6. If you want to change the title of a document, click the **Edit** icon in the row associated with the document, modify the title in the text box, and click **Update**.
7. If you want to replace a document listed here, click the **Document** icon in the **Action** field of the row associated with the document, and then click **Choose File** in the **Replace Document** dialog box.
8. Now find the replacement file and either double-click it or select it and click **Open**, then click **Replace**.

CREATING AND MODIFYING CLIENT INSTRUCTION TEMPLATES

1. To create a new **Client Instruction** template from the **Instructions** page, first click **Add Instruction**.
2. In the **Add Instruction** dialog box, enter the title you want to give the template in the **Title** text box.
3. Next, click in the **Template** text editor, and compose the main text of the message you want to convey.
4. When you come to locations in the text that you would like to have Appraisal Scope autofill with details pulled in from other locations within your platform-version (e.g., the client displayed on report), click the **Add Tag** drop-down list and select the tag to be included.
5. After you've finished modifying the template, click **Save**.
6. If you want to modify the title or content of an instruction template, first click the **Edit** icon in the row associated with the template.
7. The **Edit Instruction** dialog box will open, giving you access to the template text and title. You can use the text fields and drop-down list as described in Steps 2–4 to revise the template.

NOTE REGARDING INSTRUCTION SETS AND APPRAISAL SCOPE FUNCTIONAL LEVELS

When instruction templates are created and assigned from the **Instructions** sub-page, they are being assigned at the global level (See the [Functional levels](#) section for a detailed explanation regarding functional levels). What this means is that the parameters dictating when these templates automatically are applied can be set to apply to all, or most, order scenarios, regardless of who's placing the order or the location of the subject property.

For instance, if an AMC is using an Opening and Closing statement that they want to assign to be part of every instruction set accompanying each order, they will assign those statements at the global level from the **Instructions** page. In the case of instruction templates, configuring their assignment settings at the global level is called mass assignment (see the *Mass Assigning and Cloning Client Instructions* section that follows in this User Guide).

It's important to note that instruction template settings are also configurable at the client company level. The order of instruction sets can be adjusted or templates can be added to an instruction list at this level. These types of settings and adjustments are made from a client company profile, and these settings will impact instruction sets accompanying orders placed by that client company only.

NOTE REGARDING HOW TEMPLATES COMBINE TO CREATE INSTRUCTION SETS

Instruction templates that are mass-assigned will automatically combine when orders are placed that meet the set parameters. It's important to note here that these templates will combine to create an instruction set in an inverse manner from the order in which they are mass-assigned, and so they should be assigned with this fact in mind. This means that information an AMC wants to appear last in a set of instructions will need to be assigned first, and information that the AMC wants to appear first will need to be assigned last.

Instruction Set: Scenario 1.

To explain this further, we can imagine a scenario where an AMC wants a standard set of instructions to be created for most orders that will be carried out in Appraisal Scope. They will want to mass assign the templates that will combine to create this set of instructions.

For simplicity, they create three templates that they label Opening, Middle, and Closing. In order to make sure that the information contained in the set of instructions is in the right order when the instruction set is automatically created, they know they will need to *start* with the Closing template when they're configuring it for mass-assignment. Next, they will configure the Middle template for mass-assignment. And lastly, they will configure the Opening template for mass-assignment.

We can imagine that the AMC has included Lender ABC in the parameters configured during mass-assignment for each of the aforementioned Opening, Middle, and Closing templates. Now, when the AMC goes to Lender ABC's client company profile, these templates will appear there as a list in the **Instructions** pane.

In the list, they will appear in the correct order, Opening on top and Closing on the bottom, but templates in a list can be adjusted in a drag-and-drop manner by clicking on an entry to grab it, and then dragging and dropping it in a new position in the list. So, if we imagine that the AMC at a later date needs to mass assign a new template that will impact Lender ABC's list, they will be able to simply drag-and-drop that new template into the correct position in Lender ABC's client company profile.

MASS ASSIGNING AND CLONING CLIENT INSTRUCTIONS

Overview

The Mass Assign functionality on Appraisal Scope allows an AMC to choose what instructions they want the system to generate when an order is placed. An admin user can assign templates to generate these instructions on the basis of the ordering client company, the geographical location of the subject property, and/or the jobtypes ordered.

Admin users will need to configure assignment settings for each individual template that's created. A set of instructions is essentially, then, a compilation of the templates that an order generates, dictated by the specific details of that order. An admin user can also choose to include uploaded documents to accompany these instructions.

Appraisal Scope will generate a set of instructions as soon as an order is submitted, and these instructions will be visible to AMC staff users and vendor users from the **Order Details** page associated with that order.

Mass Assigning Client Instructions

1. To access the **Mass Assign** configuration elements, first select a template from the **Instruction Template For Client** list, and then in the row associated with that template, click **Mass Assign**. The **Mass Assign** page will open.
2. The **Mass Assign** page is broken into four columns that correspond to the four configuration parameters. To narrow your list of options in any column, enter your filter criteria in the **Filter** text box of a given column.
3. To choose all options in a column, click the **Select All** check box in the column header.
4. To ensure that your selections in a column remain visible when the corresponding **Filter** is used, go to the bottom of the **Mass Assign** page, and click the **Include all checked items in client column regardless of filter** toggle switch so that it appears green.
5. Select check boxes to choose the parameters that will trigger Appraisal Scope to use the relevant configured template in its auto-generated instructions.
6. To have all client companies newly added to your platform-version automatically added to the list of triggering client companies, select the **Auto Add New Client** check box, just above the column displaying client company information.
7. To have all jobtypes newly added to your platform-version automatically added to the list of triggering jobtypes, select the **Auto Add New Jobtype** check box, just above the column displaying jobtypes.
8. After you've finished configuring the **Mass Assign** settings for your template, click **Assign**.

Cloning Client Instruction templates

1. To clone a template available in your **Instruction Template For Client** list, first choose the template you want to clone, and then click **Clone**.
2. In the **Title** text box of the **Clone Instruction** dialog box, enter the name you want to give your cloned instruction template.
3. Choose any Mass Assignment configurations that you want to carry over to the cloned template, and select the appropriate parameters from the **Document**, **State**, and/or **Job Type** check boxes.
4. Click **Clone** when finished. The cloned template will now appear in your **Instruction Template For Client** list.

CHAPTER 4. JOBTYPES: TAB FUNCTIONALITY AND RELATED CONCEPTS

The Manage Job Types page

Overview: Managing jobtypes

The **Jobtype** tab is located on the main tab menu. When a user clicks **Jobtype**, the **Manage Job Types** page opens. This page is where the jobtypes that an AMC has created or saved to their platform-version will be listed. AMC admin users are able to configure the jobtypes here to determine what jobtypes will display to vendor users at time of registration, whether FHA and commercial rules will pertain to a given jobtype, whether the appraiser's opinion of value displays within order details, and the type of file format of the appraisal reports received by the AMC.

The Appraisal Scope term jobtype is equivalent to an appraisal form, or as it's often referred to throughout this User Guide, a valuation product. In the Appraisal Scope platform's default setup, a comprehensive list of appraisal forms is provided under the **Appraisal Form** column on the **Manage Job Types** page. Most of these forms are grouped in categories corresponding to the type of loan an individual form is associated with, e.g., conventional, jumbo, FHA, or USDA. Supplemental or other more rarely used forms are at the bottom of the list.

The list is entirely customizable (please see Note following this paragraph). Admin users can rename forms, delete forms, and change the organizational structure of the page to suit their AMC's preferences. It's important to note, though, that although the jobtypes on this page can be modified at any time, they will ultimately represent the valuation products that make up Jobtype Lists, known commonly as fee schedules, assigned to clients.

Note: The **Delete** icon is permission dependent and is only available to AMC staff who have been granted this permission during setup.

Tasks for managing jobtypes

Adding a new jobtype

An admin user can easily add an appraisal form to a platform-version's list of forms on the **Manage Job Types** page. To add a form, a user will type the form name into the **Appraisal Form** text box, select the **FHA** or **Commercial** check boxes if the form will pertain to either an FHA or Commercial loan type, and select the **PDF** or **XML** check boxes to denote in what file format they'd like to receive the appraisal report returned for orders requesting this newly added valuation product. When the user has made these choices, they'll click **Add New**, and the new valuation product will appear in the list under the **Appraisal Form** column.

Configuring jobtypes

Admin users can control jobtype configuration options in the **Display to App.**, **FHA**, **Commercial**, **Appraised Value**, and **File Types** columns by either selecting, clearing, or leaving empty the check boxes within these columns.

DISPLAY TO APP.

When the **Display to App.** check box associated with a jobtype is selected, and when certain other platform-setting dependent conditions are met, this jobtype will display to an appraiser on their platform interface.

When an appraiser registers for an AMC's platform, the appraiser will be asked if they are able to complete this jobtype and what their customary fee is for the product. An admin user can clear this check box at any time as well. When the check box is clear, the jobtype it's associated with will not appear to appraisers on their platform interface.

FHA AND COMMERCIAL

The **FHA** and **Commercial** check boxes should be selected to denote when a jobtype is specific to an FHA loan or a commercial product.

APPRAISED VALUE

The **Appraised Value** check box controls whether an appraiser's opinion of value will be displayed within the order details when an AMC receives an appraisal report. When this check box is checked, and if other platform-setting dependent conditions are met, the appraiser's opinion of value will be included in the order details. In cases when the appraisal report is delivered in an XML format, the opinion of value will be pulled from the XML. If the appraisal report isn't delivered in an XML format, the appraiser will be prompted to manually enter the opinion of value. It's important to note, though, that if an AMC wants the opinion of value to display, this check box must be checked.

FILE TYPES

An admin user can control from the **File Types** column what file type or types they want an appraisal report for a valuation product to be in when it's received. The user will simply select the **PDF** and/or **XML** check boxes associated with a jobtype to choose the format. AMCs should also be aware that **ACI**, **ZAP**, **ENV**, and **ZOO** file type options are available to be turned on by a member of Appraisal Scope staff if an AMC would like to receive files in any of these formats.

Mapping column

The **Mapping** column is where an admin user can see if a valuation product on their AMC's platform-version is mapped to the Appraisal Scope standardized appraisal form. AMCs will need their jobtypes to be mapped when they're using the Appraisal Scope to Appraisal Scope integration, when they're using integrated QC rules, and when they're assigning jobs to appraisers who are listed in Appraisal Scope's directory of appraisers but who haven't yet joined their panel of appraisers.

Appraisers who haven't registered with an AMC's platform-version and so aren't on their panel of appraisers will not have set their fees to this AMC's valuation products. When an AMC's valuation product is mapped to the Appraisal Scope standardized appraisal form, however, the system can still assign an order to these appraisers because Appraisal Scope can match the valuation product on the order with the appraiser's fee for the appraisal form that the AMC's product is mapped to.

MAPPING JOBTYPES

1. To map your AMC's jobtypes to Appraisal Scope's standardized appraisal forms, click **Jobtype Mapping** in the upper right-hand corner of the **Manage Job Types** page.
2. The **Jobtype Mapping** dialog box will open.
3. The **Local Appraisal Form** column shows the jobtypes in your Appraisal Scope platform-version, and the **Directory Appraisal Form** column shows Appraisal Scope's standardized appraisal forms.
4. Go down the **Local Appraisal Form** list, and in each case where the adjacent entry from the **Directory Appraisal Form** list shows **Unmapped**, click the drop-down box.
5. Choose from the list that opens the appraisal form describing the same valuation product that's described by your chosen appraisal form name.
6. After you've finished mapping your jobtypes, click **Close**.

Jobtype add ons

The **Add ons** column allows admin users to have a platform-version add additional appraisal forms to a jobtype when an order for that product is placed (please see Note following this paragraph). To access these forms, a user will click the **Plus** icon associated with a jobtype. The **Set Addon** dialog box will then open, and a user will select the check boxes that coincide with any of the jobtypes that they want their platform-version to add to an order. When finished, the admin user will click **Save**.

Note: Add-ons are available for AMC admin users and client users ordering via the native Appraisal Scope platform. Most integrations do not support this option.

The Jobtype Lists page

Overview: Managing Jobtype Lists

The **Jobtype Lists** page is accessed from the **Manage Job Types** page by clicking **Jobtype Lists** in the upper right-hand corner. Just as the Appraisal Scope term jobtype had its common equivalent, valuation product, so does the Jobtype List have its equivalent, the fee schedule. AMCs will use the **Jobtype Lists** page to add or create new fee schedules and to access fee schedules that have been previously uploaded and saved within their Appraisal Scope platform version.

Admin users will also find options on the **Jobtype Lists** page to change the name of a fee schedule, delete existing fee schedules, change settings associated with all valuation products on an existing fee schedule at the same time, and import fee schedules or add valuation products to existing fee schedules that are documented in comma separated values (CSV) file types. Along with these options, admin users can select any valuation product on a fee schedule and change fees associated with the product, as well as configure how these changed fees will be applied to the client company, or companies, they're applying the fee schedule to.

Note: Admin users can create, save, and apply to their clients within their platform-version as many different fee schedules as they'd like. These users will assign fee schedules to clients through an interface available under the **Users** tab (see *Users Tab Controls* section).

Tasks for managing Jobtype Lists

Adding fee schedules

Admin users can add fee schedules to a platform-version in different ways. A fee schedule can be built from the individual valuation products stored in a platform-version, by cloning an existing fee schedule and saving it under a different name, or by importing a fee schedule as a CSV file. The procedures for building a fee schedule from valuation products and for cloning an existing fee schedule and saving it under a different name are detailed below, followed by a section that will go into detail about the requirements and procedures for importing fee schedules.

CREATING A FEE SCHEDULE FROM AN AMC'S VALUATION PRODUCTS

1. To build a new fee schedule from your AMC's list of valuation products, click **Add Job List** in the upper left-hand corner of the **Jobtype Lists** page and enter the new fee schedule name in the **Job List Name** text box.
2. Click **Save**, and the new fee schedule name will now show up in the **Select Job List** box.
3. Click **Add Jobtype to List**, and the **Add Job Type to List** dialog box will open.
4. Select from the **Appraisal Form** column the check boxes that correspond to the valuation products that you would like to appear in the new fee schedule. If you would like this fee schedule to contain all of the listed appraisal forms, select the check box from the header row, to the left of the **Appraisal Form** header.
5. When you're finished making selections, click **Save**.

6. The fee schedule with these valuation products will appear on the **Jobtype Lists** page, available to modify and apply to client companies as needed.

CLONING A FEE SCHEDULE TO BE APPLIED UNDER A DIFFERENT NAME

1. To duplicate an existing fee schedule to be applied under a different name, click **Add Job List** in the upper left-hand corner of the page.
2. Enter the name to be associated with the new fee schedule in the **Job List Name** text box and select the **Clone Existing Job List** check box.
3. Click the **Select Clone List** box and choose the existing fee schedule you'd like to clone under the new name.
4. If you'd like to see the valuation products included in the fee schedule that you've chosen, click **View related jobtype** on the right side of the page.
5. When you're satisfied that this is the fee schedule you want to clone, click **Save**.
6. The newly cloned fee schedule will appear on the **Jobtype Lists** page, available to modify and apply to client companies as needed.

Importing a fee schedule

REQUIREMENTS FOR IMPORTING A FEE SCHEDULE

File Type

Fee schedules to be imported to an Appraisal Scope platform-version will need to be in a spreadsheet format. Admin users can create these fee schedules in whatever spreadsheet software they'd like. When a fee schedule has been created, though, the admin user must save it as a CSV file. This is an essential step, because any fee schedule that an admin user intends to import to their Appraisal Scope platform-version will have to be in a CSV file format.

Note: The above information and the essentials of what follows will also apply when admin users want to import fees into a fee schedule that already exists on their platform-version.

Column Headers

Fee schedules to be imported must have a column for each fee type that they include, and they must have headers over each of these columns. The headers can reflect whatever an AMC would like to call a particular fee type. For instance, an AMC might want to call a client rush fee that they've decided to implement just a rush fee (see *Mapping fee schedule imports* section). The important thing to note here is that each column will need to have a header in order for it to import properly.

The number of columns and headers required for the fee schedule will be partially dependent on the types of fees that an AMC wants to include in the schedule, and partially dependent on how an AMC wants fees related to this specific fee schedule to be assigned, i.e., by default or by geographic location. Admin users can see this principle at work in Figure 4.1 (see next page). Note that every time the fee type in the **Import Type** box changes, the **Required Columns** field changes. This indicates that which columns are required to import a fee schedule will change based on how an AMC wants to assign these fees for orders, i.e., Default, State, County, or Zipcode.

It also needs to be said that although the instructions here are telling the user that these columns are required in the fee schedule that's imported, what this really means is that these are the columns required if all of the fee categories that are indicated are to be used on a fee schedule. In other words, if an AMC doesn't wish to use a client rush fee, for example, then the **Client Rush Fee** column won't need to necessarily be present in the CSV file. In the end, any column that isn't included in a CSV file will simply mean that these types of fees aren't assigned for the valuation products included.

It's also true that for columns which are included, any fee field left blank within that column will just mean that a particular valuation product will carry a fee of zero for the fee type that the column represents. One

last thing to note is that regardless of the other column headers and columns, every file will need to have a column of valuation product names, and so every fee schedule will be required to have a header corresponding to this column.

Mapping fee schedule imports

The column headers and valuation products in a fee schedule must be mapped to the column headers and jobtypes that are specified in an AMC’s platform-version of Appraisal Scope. This means that admin users can name the headers and products of their fee schedule whatever they’d like, but they will need to identify what these headers and products correspond to in terms of the column headers and jobtype names specified within their platform-version.

To understand this requirement, an admin user should recall that Appraisal Scope has its own standard list of jobtypes that correspond to appraisal forms. When jobtypes are imported into the platform that don’t match the names included in this standard list of jobtypes, Appraisal Scope needs a way to identify what these valuation products are, and it does so by matching them to the names of the standard jobtypes it contains.

This is where mapping comes in. In cases where a name that an admin user gives to a valuation product differs from the name that Appraisal Scope uses for the same product, the admin user is responsible for matching their product name to the product name that Appraisal Scope contains, and they do this through mapping. This is also the same principle behind the requirement for headers, and in instances where the headers used by an admin user in a fee schedule to be imported don’t match the column names that Appraisal Scope uses, the headers of the import must be mapped to the Appraisal Scope headers.

As an example of how mapping works in this instance, an AMC admin user might call a valuation product they’re offering on their fee schedule *FHA 1004*. Appraisal Scope, on the other hand, knows this as jobtype *FHA 203K Single Family (1004)*. The name given to this valuation product will need to be mapped to the jobtype name when the fee schedule is imported as a CSV file.

Figure 4.1. Screenshots showing the required columns for different import scenarios.

The figure consists of four screenshots arranged in a 2x2 grid, each showing a 'Jobtype Fee Import to Woodlands Credit Union' interface. Each screenshot has a 'Required Columns' list highlighted in yellow. Below each screenshot is a red circle with a number and a descriptive text box.

- Screenshot 1 (Top Left):** 'Import Type' is 'Import Default Fee'. The 'Required Columns' list includes: 1. Jobtype name, 2. Client fee, 3. Appraiser fee, 4. Management fee, 5. Client Rush fee, 6. Appraiser Rush fee.
- Screenshot 2 (Top Right):** 'Import Type' is 'Import State Fee'. The 'Required Columns' list includes: 1. Jobtype name, 2. State (Abbreviations are required, example: AL), 3. Client fee, 4. Appraiser fee, 5. Management fee, 6. Client Rush Fee, 7. Appraiser Rush Fee.
- Screenshot 3 (Bottom Left):** 'Import Type' is 'Import County Fee'. The 'Required Columns' list includes: 1. Jobtype name, 2. State (Abbreviations are required, example: AL), 3. County, 4. Client fee, 5. Appraiser fee, 6. Management fee, 7. Client Rush Fee, 8. Appraiser Rush Fee.
- Screenshot 4 (Bottom Right):** 'Import Type' is 'Import Zip Fee'. The 'Required Columns' list includes: 1. Jobtype name, 2. Zip Code, 3. Client fee, 4. Appraiser fee, 5. Management fee, 6. Client Rush Fee, 7. Appraiser Rush Fee.

1 This highlighted section shows the columns required when the fees of an imported fee schedule will be assigned using the Default settings.

2 This highlighted section shows the columns required when the fees of an imported fee schedule will be assigned using the State fee settings.

3 This highlighted section shows the columns required when the fees of an imported fee schedule will be assigned using the County fee settings.

4 This highlighted section shows the columns required when the fees of an imported fee schedule will be assigned using the Zipcode fee settings.

INSTRUCTIONS FOR IMPORTING A FEE SCHEDULE

1. From the platform landing page, click the **Jobtype** tab, and then click **Jobtype Lists** on the right side of the **Manage Job Types** header.
2. On the **Jobtype Lists** page, click **Add Job List** and type the name of the Jobtype List and the date of entry in a MM-DD-YY format into the **Job List Name** box.
Note 1.: Providing the date of entry leaves a useful record of when a Jobtype List was created in the system.
3. Click **Save**, and the **Select Job List** drop-down box should display the name of the Jobtype List that you just saved. If it doesn't, or if you're importing a Jobtype List for which a placeholder name was previously created, click in the **Select Job List** drop-down box and choose the name of this Jobtype List.
4. Click **Import Fee** on the far right of the button bar that's to the right of the drop-down box.
5. Next, click the **Import Type** drop-down list, choose whether the fees will be assigned by Default, State, County, or Zip, and click on the corresponding choice.
Note 2.: Remember that the CSV file must have a header that reflects the choice that the AMC is making whether to assign fees by Default, State, County, or Zip, and the choice made from this drop-down list will need to match the CSV header.
6. Click **Select File**, choose the relevant file on your local desktop, and click **Open**.
7. Under the directive **Please Map Column**, click in each drop-down list that corresponds to a category of information provided in the CSV, click on the option from the list of CSV file column headers that matches this information, and then click **Next**.
Note 3.: An example of this procedural step could be as follows: a CSV file includes the column headers **Products** for **Jobtype Names**, **Client Pays** for **Client Fee**, and **Appraiser Charges** for **Appraiser Fee**; each drop-down list would include the names provided in the CSV file, and you would choose from the options the name that matches the type of information it represents.
8. A page will now appear with the directive **Please Map Jobtype Name**. The **System Jobtype** column lists the jobtypes specified in the platform-version you're working in, and the **CSV Jobtype** column lists the jobtypes as named in the CSV file. For any instance where these names don't match, the entry in the **CSV Jobtype** column will display **Unmapped**, and the jobtype name from the CSV column will need to be mapped by clicking in the drop-down list corresponding to this entry, choosing the correct jobtype name from the list, and clicking on that jobtype name.
Note 4.: If this does occur during a Jobtype List import and the CSV file doesn't make explicit how the CSV jobtype names are to be mapped, a user may simply click **Import** without mapping. This jobtype name will remain unmapped, meaning the Jobtype List that's imported will display a value of zero for that jobtype.
9. Once the **CSV Jobtype** column is mapped to the **System Jobtype** column, click **Import**.
10. The **Jobtype Lists** page will now open. If the imported Jobtype List has specified that fees will be assigned based on State, County, or Zip, click in the drop-down lists in the **Location** column for each corresponding jobtype under the **Appraisal Form** column, and click on the appropriate term.
Note 5.: If no geographic fee assignment category was specified in the CSV file, the values under the **Location** header will remain at **Default**. Check to see that the fees are displaying properly on the list that's displayed on this **Jobtype Lists** page.
11. Once all **Location** values have been set, spot-check that the fees and jobtypes have imported correctly by clicking on **Set Fees by Location** for any jobtype you wish to review under the **Action** header. Find the state to which the fees apply and verify that the fees are displayed under the correct category. If fees have been set to assign by County or Zip, click **Set By County** or **Set By Zipcode** from the line associated with the correct state under the **Action** column, and verify that the fees display correctly here.

- Click **Close** in the upper-right hand corner of the dialog box to return to the **Jobtype Lists** page.
- This will complete the *Importing a Jobtype List* process. To assign the Jobtype List to the client company specified by the AMC staff, see the *Assigning a Jobtype List to client company procedures*.

Adding jobtypes to an existing Jobtype List

An admin user has the option to add jobtypes saved in the platform to an existing Jobtype List from the **Jobtype Lists** page.

To add jobtypes, select the relevant Jobtype List from the **Select Job List** box and then select the **Add Jobtype to List** button. When the **Add Job Type to List** dialog box opens, choose any jobtypes to be added by clicking on the check boxes corresponding to the jobtypes and select the **Save** button to add them to the Jobtype List.

Changing the name of a Jobtype List

An admin user has the option to change the name of an existing Jobtype List from the **Jobtype Lists** page.

To change the name of a Jobtype List, first select the Jobtype List to be modified from the **Select Job List** drop-down list, and then select the **Edit Job List** button. When the **Edit Job Type List Name** dialog box appears, enter the desired new Jobtype List name in the **New Job List Name** field and select the **Submit** button.

Deleting a Jobtype List

An admin user can delete a Jobtype List from the **Jobtype Lists** page. The user will click the **Select Job List** box, select the Jobtype List to be deleted, and then click **Delete Job List**.

Updating settings for multiple jobtypes on a Jobtype List simultaneously

- To update settings for multiple jobtypes from the **Jobtype Lists** page, click the **Select Job List** box and select a Jobtype List.
- Click **Mass Update Jobtype**, and the **Jobtype Mass Update** dialog box will open.
- First, select the check boxes beside each of the jobtypes to be updated, or select the check box in the **Job Types** header to select all jobtypes at once.
- Next, select the check boxes under the **States** column beside each state to which the updates will be applied, or select the check box in the **States** header to select all states at once.
- Finally, enter any fees that need to be updated into the **Client Fee**, **Management Fee**, **Appraiser Fee**, **Client Rush Fee**, or **Appraiser Rush Fee** fields under the **Fees** header.
- If a management fee update will be used instead of a client fee, select the **Management Fee** check box adjacent to the **Management Fee** text box (See the [Management fee](#) entry under the *Fee columns and associated fee types explained* section for more details on management fees).
- If an Appraiser fee has been updated, select the **Appraiser Fee** check box adjacent to the **Appraiser Fee** text box if you want the fee entered here to apply automatically. If there are cases where an appraiser will input their fee and their fee will be used instead, leave this check box empty. (See [App. fee](#) under the *Fee columns and associated fee types explained* section for more details on appraiser fees.)

Note: Additional, circumstantial fees are available to be added to Client and/or Appraiser fees by selecting the **Clipboard** icon adjacent to the **Client** and **Appraiser Fee** fields.

Editing fees for specific jobtypes on a Jobtype List

To edit any fee associated with a jobtype on a Jobtype List, an admin user will click the **Edit** icon associated with that jobtype from the **Edit** column. This action will allow the user to edit fees from any category associated with the jobtype. The user will click **Save** to save changes and return to the Jobtype List.

Deleting specific jobtypes from a Jobtype List

To delete any jobtype from a Jobtype List, an admin user will click the **Delete** icon associated with that jobtype from the **Delete** column.

Fee columns and associated fee types explained

Fees that can be applied to the jobtypes in the **Jobtype Lists** fall into five general categories: client fees, management fees, appraiser fees, client rush fees and appraiser rush fees. These categories correspond to column headers on the **Jobtype Lists** page.

An AMC admin user will have options to control how these fees aggregate to make up the final fee that a client sees and will act on.

Client fee

The **Client Fee** column is where an admin user can see the client fees that are set for each jobtype on any given Jobtype List and can edit these fees. To edit the client fee associated with any given jobtype, click the **Edit** icon in the **Edit** field associated with that jobtype and then select the **Save** button.

User Note: Fees for the same jobtype (aka valuation product) can differ from one Jobtype List to the next. These fees are controlled entirely by the AMC admin user.

Management fee

The **Management Fee** column is where an admin user can set management fees for any jobtype on a Jobtype List. In order to utilize the management fee option, the management fee field must have a value entered into it, and the check box within the field must be checked.

An admin user will select this check box when they wish to replace the client fee for a specific jobtype on a Jobtype List with a value that's equal to the management fee plus the appraiser fee (see App. Fee details below). In other words, when this check box is checked and a fee is entered for the **Management Fee** field, this fee value will be added to the value entered in the **App. Fee** field associated with the same jobtype, and the value that results will replace the client fee value for that jobtype when Appraisal Scope calculates the total fee that's displayed to the ordering client.

App. fee

The **App. Fee** column is where the appraiser fee value will be set for any given jobtype on a Jobtype List. The check box within the App. Fee field allows the admin user to control whether the AMC sets the appraiser fee for a valuation product, or whether the fee a vendor user has set on their profile will apply. When the check box in this field is selected, Appraisal Scope will apply the fee that an admin user has set when the client fee is aggregated; when the check box is clear, Appraisal Scope will apply the fee that a vendor user has set on their profile to the total appraiser fee.

Client Rush fee

The **Client Rush Fee** field is where an admin user has the option to input a fee for an order where a faster than customary turnaround is requested. Fees entered here will apply to the aggregated client fee.

App. Rush fee

The **App. Rush Fee** field displays fees that a vendor user will require be applied to an order where a faster than customary turnaround is requested. The option to display the rush fee is managed in the [client company profile](#), accessible from the **Users** tab (see Chapter 5.). Fees entered here will apply to the total fee owed to the appraiser.

Setting product fees on a fee schedule

Introduction

Admin users have the option to set or change fees for each individual valuation product on a fee schedule from the **Jobtype Lists** page. These users will have the option to set individual fees by geographic location, and to have the location dictate how their platform-version chooses the fees it will aggregate into a total, or they can instead set fees that will aggregate without any consideration of geographic factors (see the *Overview of Fee Search process* section for more information on how Appraisal Scope uses fee settings to aggregate fees).

To set fees to aggregate without considering geographic factors, see the following procedures. To set fees to aggregate based on geographic location, please read on to the *Overview of Fee Search process* section.

Setting product fees on a fee schedule

1. To set or change product fees on a fee schedule that will aggregate without considering geographic factors, click **Jobtype Lists** from the right-hand side of the **Manage Jobtypes** page.
2. When the **Jobtype Lists** page opens, click the **Select Job List** box and click the name of the fee schedule you want to open.
3. Next, in the **Edit** column click the **Pencil and Notepad** icon associated with the valuation product you want to set fees for and choose which fees to set from among the five fee columns.
4. Enter fee values into the text boxes associated with those fees.
5. In the Location column, click **Default**, and then click **Save**.

Overview of Fee Search process

Appraisal Scope offers a four-level system for identifying the fees that will be assigned to any individual valuation product. The categories that make up these levels correspond to the options in the **Location** list: **Default**, **State**, **County**, and **Zipcode** (Please see *Note regarding County and Zipcode fees*).

Zipcode. This is the first level in the fee search process. If **Zipcode** is chosen when the fees are set up, Appraisal Scope will begin searching for fees at this first level when an order is placed. The platform will search for fees that have been entered for the zip-code associated with a property. If Appraisal Scope finds values here, it will use these values when it calculates the total fee to be paid by the client for the associated work. If it doesn't find values at the **Zipcode** level, it will automatically move up one level to **County**.

County. This is the second level of the fee search process. Appraisal Scope searches for fees at the **County** level in the same way it does for **Zipcode**. If the platform finds that a value has been entered for the county associated with a property, it will use this value when it calculates the total fee to be paid by the client. If it doesn't find values at the **County** level, it will move one level up to **State**.

State. This is the third level of the fee search process. Appraisal Scope makes the same search at the **State** level, and if it finds no values set for the state in which the property is located, it will fall back to the **Default** fees that were set when the fee schedule was created.

Default. This is the fourth level in the fee search process. If **Default** is chosen, Appraisal Scope will automatically use the fees that were set when the fee schedule was created to calculate the final fees.

Users control how Appraisal Scope will calculate client fees, then, by choosing from the options in the **Location** list. When an admin user selects **Zipcode**, **County**, **State**, or **Default**, the user is giving the platform instructions to begin this fee search process at either the **Zipcode**, **County**, **State**, or **Default** level.

Note regarding County and Zipcode fees: Many AMCs primarily utilize the Default and State fees for fee assignment. County and Zipcode fees should be used with discretion because they commonly require ongoing maintenance and attention.

Setting fees on valuation products by State

1. From the **Jobtype Lists** page, click the **Select Job List** box and select a Jobtype List.
2. When the Jobtype List opens, choose the jobtype to be modified and click the drop-down menu associated with it in the **Location** column.
3. Click **State** from the menu options, click **OK** in the confirmation dialog box, and then click **Set Fees by Location** in the **Action** column.
4. The **Set Job Fees by Location** page will open.
5. Find the state or territory to which the fee settings will pertain, and click the **Edit** icon in the associated **Edit** field.
6. Modify the applicable fee values in the **Edit State Fee** dialog box for that state or territory, and click **Save** and then **Close** if you want to return to the **Jobtype Lists** page.

Setting fees on valuation products by County or Zipcode

1. From the **Jobtype Lists** page, click the **Select Job List** box and select a Jobtype List.
2. When the Jobtype List opens, choose the jobtype to be modified and click the drop-down box associated with it in the **Location** column.
3. Click **County** or **Zipcode** from the menu options, click **OK** in the confirmation dialog box, and then click **Set Fees by Location** in the **Action** column.
4. The **Set Job Fees by Location** page will open.
5. Click **Set by County** or **Set by Zipcode** in the **Action** column, and when the **State County Fee** or **State Zip Fee** dialog box opens, locate the county or zip-code fields to modify and click the **Edit** icon in the in the **Edit** column.
6. After adjusting the applicable fees, click **Save**.
7. Repeat step 5. for each county or zip-code to be modified.
8. When finished modifying the fields, click **Close** to return to the **Set Job Fees by Location** page, and then click **Close** link to return to the **Jobtype Lists** page.

The user may note that fields under the **Client** and **Appraiser fee** columns of this dialog box display clipboard icons. When selected, these icons will open the **Client Zip Additional Fee** dialog box. This dialog box allows additional fees to be assessed by loan type, property characteristics, and/or intended use of the appraisal. These fees will be associated with the zip code to which they're attached, and they will apply to the **Client Fee** and **Appraiser Fee** categories of a Jobtype List when an order falls within that zip code.

Also note that check boxes are present in the **Management Fee** and **Appraiser Fee** columns—both at the top of the column, controlling whether or not fees in this column are attached to every zip code on the list, and within each individual field under these headings, controlling whether a fee should be applied by individual zip code when circumstances warrant.

CHAPTER 5. USERS: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Users tab

The **Users** tab contains a set of pages that allows AMC's to manage the relationships they have with their client companies. To access these pages from the landing page, an admin user will click the **Users** tab. This will take the user to the **Client** page.

The **Users** tab submenu is located at the top of this first page, and it consists of **Client, Appraiser, AMC** (see Note below), **Directory, ASC, Disabled, Panels, Pending Users,** and **License Tracking** selections. Each of these options and the functionality available within them is documented in the *Users tab controls* section on the next page.

Note: AMC to AMC configuration can be set up by contacting Appraisal Scope Support.

Overview: managing users from the Users tab

AMCs can control how they conduct business with client companies, client users, vendor companies, and vendor users within their platform-version of Appraisal Scope from the **Users** tab. Many options that affect the user experience a lender has when placing orders on an AMC's platform are accessible from the **Users** pages.

AMCs can manage how orders are placed from the **Users** tab, and they can configure the order forms that client users interact with. Options available can be applied to individual client companies and client users. The choices that are made here can reflect the preferences of the AMC or the lender that this AMC works with.

AMCs can apply a variety of fee schedules, as well, to the different client companies they're associated with from the **Users** tab. They can also create or import, and then apply **Do Not Use** and **Approved** lists of appraisers to different client companies, creating a pool of appraisers available to accept jobs based on a lender's preferences.

AMCs can search here for vendor users that have registered in their platform-version and manage these relationships with several available options. They also have options to search the Appraisal Scope directory of appraisers and ASC database from the **Users** tab.

The Appraisal Scope directory of appraisers is a list of all appraisers who have ever registered on an Appraisal Scope platform, and the ASC database is an up-to-date list of all registered appraisers in the United States who are in good standing. AMC's can invite appraisers from either the Appraisal Scope directory or the ASC database to register with them on their Appraisal Scope platform-version.

The **Users** tab is also where AMC's can see a list of appraisers who have been disabled in their platform. AMC's will have the option to export, in Excel format, a list of these appraisers.

And finally, as mentioned earlier in this User Guide, new client and vendor users who sign up on an AMC's platform-version will remain in a **Pending** status until an admin user can verify the registration. Pending client users or vendor users to be reviewed are also accessed from the **Users** tab.

Users tab controls

Client tab

CLIENT TAB SEARCH FUNCTIONALITY

Staff users can access client company and/or client user profiles by using the **Search** section on the left side of the **Client** page. When a staff user clicks **Search**, search results will appear singly or in a list beneath the **Search** section. If a staff user wants a list of all client companies in their platform-version, they can click **Search** without adding any filtering criteria.

To limit the length of the list returned, staff users can choose an account type from the **Account Type** drop-down list and/or select the geographic details from the **Country** or **State** drop-down lists. If a staff user wants to access a list of client users that fall under a particular client company, they will type the company's name in the **Company** box. If the client company is broken into branches, the staff user can further refine the search results by clicking the **Branch** box and selecting the appropriate branch. Individual client users can be singled out by staff users using the **Search By Name** or **Email** boxes.

INTERACTING WITH SEARCH RESULTS

When a staff user clicks on a client company from a list of search results, the client company profile will open to the **Details** page. The **Client Company Profile** menu and submenu will now be accessible. The tabs in the **Client Company Profile** menu and submenu allow staff users to control several aspects of a client company's setup within their platform-version. Details of the options available under each tab are covered in the [Client company profile](#) section.

Individual client user profiles can also be accessed from the search results. Staff users may notice a blue **Plus** icon to the left of a number in the first column of the search results list. Clicking on the **Plus** opens a box with the names and user statuses of all client users affiliated with the selected client company's profile. This box will show light-green when it's hovered over, and staff users will need to point to the client user name they wish to select. Clicking the client user name will open the corresponding client user profile to the **Details** page. The **Client User Profile** menu and submenu will now be accessible.

The tabs in the **Client User Profile** menu and submenu allow staff users to control several aspects of a client user's setup within their platform-version. Details of the options available under each tab are covered in the [Client user profile](#) section.

An alternative method of accessing a client user profile is to use the **Search by Name** and/or **Email** boxes in the **Search** section of the **Client** page. An entry or list of entries corresponding to the name or email criteria appear below the **Search** section. When the admin user clicks on the relevant entry, the client user profile will open and provide access to the **Client User Profile** menu and submenu.

INTRODUCTION TO DEFAULT USER TEMPLATES

Default user templates for adding new client company and/or client users are available on each Appraisal Scope platform-version. These templates can reduce the time it takes to add new users in a platform-version. The templates are pre-loaded in Appraisal Scope and can be configured to meet an AMC's particular requirements. There are templates for all client company account types and client user types (Figure 5.1) that an AMC might host on their platform-version, and once configured, they'll be available for selection when a staff user is adding a new client company or client user.

Figure 5.1. Client company account types and client user types for which corresponding default templates are available.

<u>Account Types</u>	<u>Client User Types</u>
Attorney	Loan Officer
Bank	Manager
Commercial	Processor
Correspondent Lender	
Credit Union	
Home Owner	
Lender	
Mortgage Broker	
NDC	
Private Money Lender	
Real Estate Agent	
Retail	
Wholesale Lender	
Other	

Note: Default user templates are tied in with the Account Type selection on the Add New Company page (or User Type selection if it's a client user being added), accessible by clicking New Company at the top of the Search section of the Client page. The Account Type selected will determine which default user template Appraisal Scope makes use of.

The templates will be visible in any list of client company search results. For instance, if a staff user wants a list of all client company users in their platform-version that are of account type Bank, they would click the **Account Type** box and select **Bank** from the list. The search results returned would include an entry for **Default Template: Bank**. The same would be true for each list of search results that returns a particular client company user type. To see all default templates available for configuration in the same list, a staff user can just click **Search** without using any search criteria.

Staff users may also note the presence of the **Plus** icon to the far left of each default template entry in a list. When a staff user clicks the **Plus**, the client user types **Loan Officer**, **Manager**, and **Processor** will appear in a drop-down list beneath the default template entry. This allows a user to configure default templates for any or all client user types that fall under a particular client company account type.

Note: It may be helpful to understand the relationship between the client company and client user profiles in a platform-version, and the tasks of adding client companies and client users to a platform-version, before getting into further details about default user templates. For detailed information about profiles in Appraisal Scope and how they function relative to client companies and client users, see the [User profiles](#), [Client Company Profile menu and submenu](#), and [Client User Profile menu and submenu](#) sections.

Configuring default user templates

Client company user

To configure a client company default user template, a staff user will click the **Default Template** entry associated with the client company account type they want to configure. This will give staff users access to the template for configuration, along with a selection of tabs that correspond to some of the tabs found in the **Client Company Profile** menu.

The template will open to the **Details** page. Staff users will use the **Template** menu to access each component of the profile that they want to have pre-configured and available. Each tab in the **Template** menu, along with the tools and settings configurable from them, is covered in detail in the *Client company profile* section.

Not all information that is required when adding a client company will be provided by the template, but information and settings that can usefully be standardized across client companies are. If a staff user applies a template when adding a client company, any settings or information that haven't been configured or added in the template can be input when creating the client company profile.

Client user

To configure the client user default user templates under a client company template, a staff user will click the **Plus** associated with the relevant template entry. This box will show light-green when it's hovered over, and staff users will need to point to the client user type they wish to select. Clicking the client user type will open the template for that type to the **Details** page.

Not all information that is required when adding a client user will be provided by the template, but information and settings relative to client users that can usefully be standardized are. If a staff user uses a template when adding a client user, any settings or information that haven't been configured or added in the template can be inputted when they're configuring the client company profile that they're adding.

Applying default user templates

The procedures for adding a new client company and client user are covered in the *Adding a new client company from the Client tab* and *Adding client user in existing client company profile* sections of this User Guide. To apply default user templates in either of these scenarios, a staff user will select the **Use Default Template** check box that will be visible on the page.

In the case of adding a new client company, the **Account Type** selection that a staff user chooses will dictate which template is applied. Staff users may note that each selection in the **Account Type** list on the **Add New Company** page has a corresponding default user template available to be configured and applied. Staff users should remember, however, that these pre-loaded templates need to be configured before they are used.

In the case of adding a client user to an existing client company, the **User Type** selection that a staff user picks will dictate which template is applied. Staff users may note that each selection in the **User Type** list on the **Add Users** page corresponds to one of the client user types that's available to be configured as a template. Once again, however, these pre-loaded templates need to be configured before they are used.

ADDING A NEW CLIENT COMPANY

There are two ways for client companies to be entered into a platform-version of Appraisal Scope. The first is for a member of the new client company staff to sign the company up from the **Client Sign Up** tab on the **Sign In** page (see [Approving a new client company](#) for more details).

The second way is for an admin user to add a client company from the **Client** tab.

Adding a new client company from the Client tab

1. Click **New Company**, just above and to the right of the **Search** fields.
2. Enter all available client company information under the **Company Information** section (see Note following instructions). Keep in mind that the red asterisks indicate fields where information is required.
3. Under the **User Information** section, enter the personal details of a staff member associated with the new client company.
4. In the **Password** field, make sure that the password you're issuing is at least eight characters and that it includes at least one upper case letter, one lower case letter, and one number or symbol.
5. For **User Type**, click on the drop-down list and click **Processor, Manager, or Loan Officer**.
6. Click **Sign Up**.

Note: For details on branch information, see the [Organizing client users by branch](#) section.

ADDING A NEW CLIENT USER TO AN EXISTING CLIENT COMPANY PROFILE

There are three ways for client users to be added into a platform-version of Appraisal Scope under an existing client company profile. The first is for the new client user to sign up using the **Client Sign Up** tab on the **Sign In** page of an AMC's Appraisal Scope platform-version (see the *Approving a new client user* section for more details).

The second way is for a client user with client administrator permissions to add new client users from the **Users** tab of their Appraisal Scope client portal.

The third way is for an admin user to add the client user from the **Client** tab on their platform-version.

Adding client user in existing client company profile

1. Perform a search using the **Search** options to locate the client company with which the new client user will be affiliated.
2. Click on the client company entry from the list of search results.
3. Click the **Add Users** tab from the menu at the top of the page and fill in the personal details for the new client user, making sure that all text boxes with red asterisks are filled in.
4. In the **Password** field, set a password of at least eight characters, including at least one upper case letter, one lower case letter, and one number or symbol.
5. Select the **Set as temporary** check box if you'd like to allow the new client user to change the password you set here.
6. For **User Type**, click on the **Select User Type** drop-down box and click **Processor**, **Manager**, or **Loan Officer**.
7. The **Branch** drop-down list should remain at Default Branch unless the client company has been organized by branch, in which case the branch with which the new client user will be affiliated should be clicked from the list.
8. Select the **Notify User** check box just above the **Add User** button if you want Appraisal Scope to send the new user an email with their login credentials.
9. Click **Add User**.

Client company profile

The client company profile is where a client company's details and order settings are stored. An admin user can control from the profile how their platform-version will assign and ask appraisers to fulfill orders placed by the client company, and they can specify the particular elements that will accompany these orders.

A client company profile can be accessed by clicking the name of a company from any **Client Company** list that is produced by using the **Search** options on the **Client** page. The client company profile will open to the **Details** page, and the profile menu and submenu will appear at the top of the page.

A client company profile can also be accessed from a client user's profile page by clicking the **Company Profile** tab on the submenu found there.

CLIENT COMPANY PROFILE MENU AND SUBMENU

The **Client Company Profile** menu is located at the top of the **Client Company Profile** page. The tabs available on this menu offer customization options that impact how orders placed under a client company are assigned.

The tabs also give admin users options to customize client company profiles by adding users, assigning instructions and fee schedules, assigning **Approved** and **Do Not Use** vendor lists, or adding documents and notes to be kept with the client company profile. See the following sections for details on the options available from the **Client Company Profile** menu.

Client Company Profile submenu

The **Client Company Profile** submenu is located just beneath the larger **Client Company Profile** menu. The tabs available on this submenu offer options for admin users to edit or disable a profile, set up links to be sent to members of the client company inviting them to sign up for their Appraisal Scope platform-version, or to see if the client company is synced with your QuickBooks integration.

Edit. To edit the **General Information**, **UCDP Account**, and **EAD Account** sections of a client company profile, an admin user will click Edit and enter all relevant details to be changed. When finished, the user will click **Save**.

Disable Company. To disable a client company profile in an Appraisal Scope platform-version, an admin user will click **Disable Company**. Disabled profiles can be accessed by using the **Search** section of the **Users > Disabled** page. To reenable a disabled profile, an admin user will click the relevant client company profile entry and then click **Enable Company** in the submenu there.

Note: When a client company profile is disabled, all client user profiles under that client company will also be disabled. When the client company profile is reenabled, admin users will have the option of reenabling the client company without reenabling its constituent client users, or reenabling the company and all client users simultaneously.

Profile Change Log. To access a log that displays the times and dates of any changes made to a client company profile, along with the user responsible for the change, an admin user will click **Profile Change Log**.

Email Signup Link. To send links to client company members inviting them to sign up for an Appraisal Scope platform-version, an admin user will click **Email Signup Link** and enter addresses for invitees in the **Email** text boxes of the **Email Signup Link** dialog box. The admin user will then click **Send**.

QB Sync. For AMCs utilizing a QuickBooks integration (see QuickBooks under Accounting), admin users can see from the **QB Sync** tab whether the client company is synced. Green on the embedded **QB** icon indicates that the company is synced, while white/grey indicates that it's not.

Client Company Profile menu tabs

Details

The **Details** tab displays client company information saved to the client company profile. The tab page will display company-specific identification information for the Uniform Collateral Data Portal and Electronic Appraisal Delivery systems, as well as general information about the company. The page is broken into **General Information**, **UCDP Account Information**, and **EAD Account Information** sections. Staff users can edit any of the information by clicking the **Edit** tab from the profile submenu and clicking **Save** when finished.

In the **Statistics** field under the **General Information** section, users may note the **Scorecard** icon. When a staff user clicks the icon, they can view a running 12-month tally of appraisals completed by the client company, along with performance statistics in categories like turn-times and revision rates. To show all data excluding weekend, a user will select the **exclude weekends** check box. A user can point and hover on any **Question Mark** icon associated with the column headers to view an explanation of the statistical category the header represents.

Show Notes

The **Show Notes** tab offers a location for AMCs to keep notes related to the client companies they do business with.

To add and manage notes from a client company profile, click **Add Notes** on the far-right side of the **Notes** header. A text editor offering several style options will open. After a note has been created, click **Save**.

Notes associated with a client company will be displayed in separate boxes under the **Notes** header. Details on the admin user who created the note and the date and time the note was created are displayed in the

header for each note. The notes will be organized chronologically, with the most recently created note appearing first. Any note can be edited or deleted by clicking on the **Edit** or **Delete** icon on the right side of the header for that note.

Note: Notes kept under the **Show Notes** tab are only accessible by AMC staff. These notes do not display to client users.

Client on Report

The **Client on Report** tab of a client company profile is where AMCs can manage the lenders available to be designated as Client Displayed on Report on the final appraisal report ordered by the client company or client user. In other words, client users can choose from a list created here which lender will display on the final appraisal report for an order that they place.

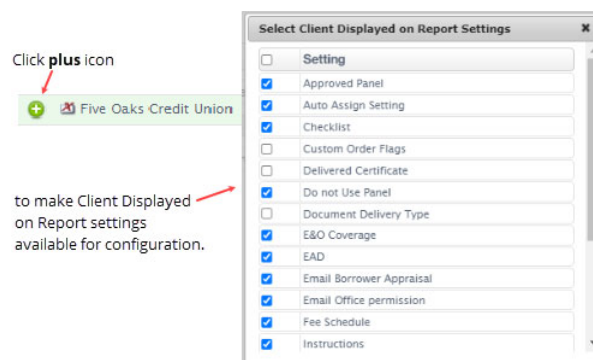
Creating lender options for Client on Report selection

From the **Client on Report** tab, click the **Select Companies** drop-down.

1. Select the check boxes associated with the lenders you want to appear as options for display on the final appraisal report.
2. As check boxes are selected, the associated lender names will appear, replacing **Select Companies** in the drop-down.
3. When all lenders have been chosen, click **Add Selected Companies**.
4. The selected companies will appear in a line across, beneath the other fields on the **Set Client Displayed on Report** section of the page.
5. A client user placing an order under this client company will now have the option to choose from a drop-down list populated with these lenders when ordering a new appraisal.

Each lender entry that appears in the **Set Client Displayed on Report** section of the **Client on Report** page is accompanied by a white **Plus** icon and a **Delete** icon. An admin user can delete each lender individually from this list by clicking delete.

Clicking the plus icon associated with a lender offers admin users a collection of choices for settings. Settings chosen here will be applied when an ordering client user has chosen this lender to display on report. The chosen settings will be "inherited" from this lender's client company profile. When a client user placing an order chooses this lender as Client Displayed on Report, the settings inherited from the lender's client company profile will replace the same categories of settings affiliated with the ordering client user or client company.



To choose the settings to be inherited from a Client Displayed on Report, an admin user will click the **Plus** icon associated with the lender name. In the **Select Client Displayed on Report Settings** dialog box, the user will select check boxes for settings to be inherited from the Client Displayed on Report. The check boxes that are deselected or that remain clear will represent settings to be applied using the client user or client company configuration.

Remember, at this point the client companies being set up as a Client Displayed on Report are simply going to be potential selections that an ordering client company can choose from when ordering a valuation product. To help admin users understand how to choose settings in this box, they should ask themselves the following question pertaining to situations when a client company would be placing an order in which they'll choose a Client Displayed on Report.

Will the client company placing the order want Appraisal Scope to use certain settings associated with the Client Displayed on Report company when processing this order? If the answer is yes, then the admin user should select the check boxes associated with those settings in the **Select Client Displayed on Report Settings** dialog box. If the answer is no, then the admin user should leave all check boxes empty in this dialog box.

Note: Admin users should be aware when configuring the **Client on Report** page for client company profiles that some check boxes in the **Select Client Displayed on Report Settings** dialog box are pre-selected. As a result, the admin user should make sure that these pre-selected settings don't conflict with the configuration that they want to achieve.

To sum up, any check boxes left empty will essentially mean that Appraisal Scope has been instructed to use the ordering client company profile settings in those instances. Any check boxes filled in and displaying a checkmark will mean that Appraisal Scope has been instructed to use the Client on Report's client company profile settings in those instances. Not all check boxes need be empty, and not all need be selected.

Note: In instances where the profile settings associated with the ordering client user's profile, or the branch profile settings associated with that client user's branch, take precedent over the client company profile settings of the ordering client user's client company, Appraisal Scope will use the client user or branch profile settings when a relevant check box is left empty in the **Select Client Displayed on Report Settings** dialog box.

Managing Client Displayed on Report settings

The check boxes in the **Select Client Displayed on Report Settings** dialog box correspond to settings configurable for each client company profile. The following information describes where each setting in the dialog box also appears in the client company profile, and it details exactly what each setting will mean to Appraisal Scope functionality if chosen in the dialog box.

Approved Panel. The **Approved Panel** check box references the **Appraiser Approved Lists**, located under the **Vendor Panels** tab of the client company profile. When the check box is selected, Appraisal Scope will use the approved vendor panels configured and assigned under the Client Displayed on Report's client company profile. If the check box is empty, Appraisal Scope will use the approved vendor panels configured and assigned under the ordering client's client company profile.

Auto Assign Setting. The **Auto Assign Setting** check box references the settings found under the **Auto Assign** tab of the client company profile. When the check box is selected, Appraisal Scope will use the auto-assignment settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the auto-assignment settings configured under the ordering client's client company profile.

Checklist. The **Checklist** check box references the client checklists and their assignment settings, located under the **Add Checklist** tab of the client company profile. When the check box is selected, Appraisal Scope will use the assigned checklists associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the assigned checklists configured under the ordering client's client company profile.

Custom Order Flags. The **Custom Order Flags** check box references the **Automatically apply one or more order flags to all new orders** setting found under the **Company Settings** tab of the client company profile, **Order Management** section. When the check box is selected, Appraisal Scope will use the order flags settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the order flags settings configured under the ordering client's client company profile.

Delivered Certificate. The **Delivered Certificate** check box references the **Automatically send client Delivered Certificate, Send Delivered Certificate when report is, and Generate Delivered Certificate for additional documents when report is** settings, which allow admin users to enable automatic certificate delivery and dictate when the certificate will be sent and generated. These settings are found under the **Company Settings** tab of the client company profile, **Borrower Delivery** section.

When the check box is selected, Appraisal Scope will use the certificate delivery settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the certificate delivery settings configured under the ordering client's client company profile.

Do not Use Panel. The **Do not Use Panel** check box references the **Appraiser Do Not Use Lists**, located under the **Vendor Panels** tab of the client company profile. When the check box is selected, Appraisal Scope will use the **Do Not Use** lists configured and assigned under the Client Displayed on Report's client company profile. If the check box is empty, Appraisal Scope will use the **Do Not Use** lists configured and assigned under the ordering client's client company profile.

Document Delivery Type. The **Document Delivery Type** check box references the **Send document to client as** setting found under the **Company Settings** tab of the client company profile, **Client – Order Completion** section. When the check box is selected, Appraisal Scope will use the delivery setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the delivery setting configured under the ordering client's client company profile.

E&O Coverage. The **E&O Coverage** check box references the **Minimum E&O Coverage Amount** setting found under the **Company Settings** tab of the client company profile, **Order Management** section. When the check box is selected, Appraisal Scope will use the minimum coverage amount associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the minimum coverage amount associated with the ordering client's client company profile.

EAD. The **EAD** check box references the **Automate EAD submission** setting found under the **Company Settings** tab of the client company profile, **Order Management** section. When the check box is selected, Appraisal Scope will use the EAD settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the EAD settings associated with the ordering client's client company profile.

Email Borrower Appraisal. The **Email Borrower Appraisal** check box references the **Email borrower appraisal by default** setting found under the **Company Settings** tab of the client company profile, **Client - Order Completion** section. When the check box is selected, Appraisal Scope will use the email settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the email settings associated with the ordering client's client company profile.

Email Office permission. The **Email Office permission** check box references the **Lock Email Office (Send Message)** setting found under the **Company Settings** tab of the client company profile, client users section. When the check box is selected, Appraisal Scope will use the Email Office settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the Email Office settings associated with the ordering client's client company profile.

Fee Schedule. The **Fee Schedule** check box references the Jobtype Lists and their assignment settings, located under the **Fee Settings** tab of the client company profile. When the check box is selected, Appraisal Scope will use the Jobtype Lists and their assignment settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the Jobtype Lists and their assignment settings configured under the ordering client's client company profile.

Instructions. The **Instructions** check box references the instructions and assignment settings, located under the **Instructions** tab of the client company profile. When the check box is selected, Appraisal Scope will use the instructions and assignment settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the instructions and assignment settings configured under the ordering client's client company profile.

Job Type Fee Margin. The **Job Type Fee Margin** check box references the **Set fee margin for Job Type** setting found under the **Company Settings** tab of the client company profile, **Order Management** section. When the check box is selected, Appraisal Scope will use the fee margin associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the fee margin amount associated with the ordering client's client company profile.

Mail Hard Copy to Borrower / Co-borrower. The **Mail Hard Copy to Borrower / Co-borrower** check box references the **Mail Hard Copy to Borrower / Co-borrower** setting found under the **Company Settings** tab of the client company profile, **New Order Form** section. When the check box is selected, Appraisal Scope will use the setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the setting associated with the ordering client's client company profile.

Merge Documents. The **Merge Documents** check box references three consecutive settings beginning with **Merge Documents**. These settings can be found under the **Company Settings** tab of the client company profile, **Client - Order Completion** section. When the check box is selected, Appraisal Scope will use the "if and when to merge" settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the "if and when to merge" settings associated with the ordering client's client company profile.

Require ENV. The **Require ENV** check box references the **Require ENV** setting found under the **Company Settings** tab of the client company profile, **Appraisers** section. When the check box is selected, Appraisal Scope will use the setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the setting associated with the ordering client's client company profile.

Payment Options. The **Payment Options** check box references the series of settings beginning with **Payment Options**. These settings can be found under the **Company Settings** tab of the client company profile, **Payment** section. When the check box is selected, Appraisal Scope will use the payment settings associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the payment settings associated with the ordering client's client company profile.

Populate License and E&O Documents. The **Populate License and E&O Documents** check box references the **Automatically populate appraiser license and E&O into additional documents when the appraisal report is uploaded** setting found under the **Company Settings** tab of the client company profile, **Order Documents** section. When the check box is selected, Appraisal Scope will use the setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the setting associated with the ordering client's client company profile.

UCDP. The **UCDP** check box references the **Automate UCDP submission** setting found under the **Company Settings** tab of the client company profile, **Order Management** section. When the check box is selected, Appraisal Scope will use the UCDP setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will use the UCDP setting associated with the ordering client's client company profile.

Settings pertaining to third-party integrations. The following check boxes are related to third-party integrations. As such, AMC staff users may not see them in the **Select Client Displayed on Report Settings** dialog box affiliated with their platform-version.

The **Use FNC Setting**, **Use In House Setting**, **Use Mercury Setting**, **Use RealEC Setting**, and **UWM Sync** check boxes reference these third-party integrations. When an admin user selects the check box for any of these options, Appraisal Scope will use the corresponding setting associated with the Client Displayed on Report's client company profile. If the check box is empty, the system will defer to the client's client company profile.

Vendor Panels

The **Vendor Panels** tab offers admin users the ability to assign a list of approved appraisers to a client company profile. Assigning a panel in this way ensures that orders placed by users within this client company are assigned to approved appraisers.

This tab also offers an option to assign a **Do Not Use** list of appraisers to a client company record. When a **Do Not Use** list is assigned, the platform-version will exclude the appraisers on the list as valid order recipients for orders placed on behalf of this client company.

Admin users can assign an **Approved** and/or **Do Not Use** list of appraisers from the **Vendor Panels** tab by clicking the relevant drop-down box and clicking the name of the appropriate list from the choices that appear. Next, the user will click **Assign List**.

All **Approved** and/or **Do Not Use** lists assigned to a client company profile at any given time will display under the **List Name** header associated with the **Add Appraiser Approved Lists** and/or **Assign Appraiser Do Not Use Lists** sections of the page. Details on how **Approved** and **Do Not Use** lists are created can be viewed in the [Panels tab](#) section.

Auto Assign

The **Auto Assign** tab gives admin users options to set configurations impacting orders placed on behalf of the client company based on factors dictated by the client company (Auto Assign configurations can be made at the global, client user, and branch levels as well [see the section on [functional levels](#) for information regarding the Appraisal Scope levels]). Criteria set here will determine how Appraisal Scope chooses appraisers it assigns to valuation products ordered by client users of the client company. Options can be chosen as follows.

Automatically Assign Orders. To enable the criteria entered from this tab to be used to determine what appraisers are automatically assigned orders placed by this client company, select the check box. When the check box is left clear, orders placed by client users within the company can only be auto assigned using rules established at the branch or client user levels; otherwise, orders for this client company will have to be assigned manually.

Auto assign all orders to appraisers using the following criteria. When auto assign is enabled, an admin user has the option to leave this check box alone — which will enable the platform-version to take the criteria settings chosen in the **Search Criteria** box into account when assigning appraisals ordered by this client company — or to select **Auto assign all orders to AMCs**. Leaving the check box alone brings two more options for configuration into play.

Disable for unpaid orders. When this check box is selected, the platform will not auto assign orders placed under this client company if payment has not been received.

Note: Invoiced orders will still trigger auto assign if this check box is selected.

Disable for Rush orders. When this check box is selected, the platform will not auto assign orders in a Rush status placed under this client company.

Suggest appraisers for assignment when manually assigning an order. When this check box is selected, the platform-version will use auto-assign criteria to try and suggest possible matches when an order placed under this client company is assigned manually, including instances when new orders are manually assigned and instances when orders fail to automatically assign and have to be manually assigned.

Notify the client when an appraiser is assigned. To set up an Appraisal Scope platform-version to automatically notify the client company when an appraiser is assigned, select the check box here.

Search Criteria group

Admin users can set conditions in the **Search Criteria** section that will determine which appraisers are considered when auto assign is carried out for orders placed by a client company. Note that admin users must click **Save** at the bottom of the **Selection Criteria** section of the page to apply the auto assign criteria selections they make here.

Max Distance. To enable an Appraisal Scope platform-version to apply a maximum distance rule when searching for an appraiser to assign to an order from this client company, select the check box and enter the maximum distance in the **miles** box. When this setting is enabled, appraisers whose address is further away in miles than the maximum distance will not be considered for assignment to orders placed by this client company.

To set maximum distances that will apply by state, county, or zipcode, click **Configure by state/county/ZIP**, choose the relevant states from the **Set by State** dialog box and type the desired maximum distance in the **Distance, miles** box. To set maximum distances to apply by county or zipcode, click **Set by County** or **Set by ZIP code** from the line in the **Action** column associated with the state(s) containing the county or zipcode, type the maximum distance to assign in all appropriate text boxes, and click **Save**.

Minimum Quality Rating. To enable an Appraisal Scope platform-version to use an appraiser's quality rating as a criterion for considering an appraiser for assignment to a client company's orders, select the check box, click the drop-down list, and choose a number 1 through 5. When this setting is enabled, appraisers with quality ratings less than the number showing in the drop-down list will be excluded from being assigned orders.

Minimum Service Rating. To enable an Appraisal Scope platform-version to use an appraiser's service rating as a criterion for considering an appraiser for assignment to a client company's orders, select the check box, click the drop-down list, and choose a number 1 through 5. When this setting is enabled, appraisers with service ratings less than the number showing in the drop-down list will be excluded from being assigned orders.

Note: The **Minimum Quality Rating** and **Minimum Service Rating** settings are only useful if an admin user/reviewer user is manually rating an appraiser's performance after order completion.

Minimum Turn-Time Rating. To enable an Appraisal Scope platform-version to use an appraiser's turn-time rating as a criterion for considering an appraiser for assignment to a client company's orders, select the check box, click the drop-down list, and choose a number 1 through 5. When this setting is enabled, appraisers with turn-time ratings less than the number showing in the drop-down list will be excluded from being assigned orders.

Note: The **Minimum Turn-Time Rating** is only useful if an AMC admin user/reviewer user is manually rating an appraiser's performance after order completion, or if the **Set how the Appraiser Turn Time rating is calculated** setting accessed via **Settings > Options > Appraiser Assignment** is set to **Automatic** and configured.

Maximum pending orders (assigned, accepted, scheduled, inspection Complete). To enable an Appraisal Scope platform-version to use the number of pending orders (orders in any status listed in parentheses above) attributed to an appraiser as a criterion for potential assignment to a client company's orders, select the check box and enter the maximum number of orders to consider into the text box. When this setting is enabled, appraisers whose pending orders exceed the number showing in the text box will be excluded from being assigned orders.

Exclude Appraiser if open orders equals or exceeds max orders allowed. To enable an Appraisal Scope platform-version to use the number of open orders attributed to an appraiser as a criterion for potential assignment to a client company's orders, select the check box. When this setting is enabled, appraisers whose open orders exceed the number showing in the **Maximum pending orders** text box (see above) will be excluded from being assigned orders.

Approved list. When the check box for this setting is selected, an Appraisal Scope platform-version will use lists of approved appraisers that the client company has provided to assign an appraiser (see the entry in the [Panels tab](#) section for more details about adding **Approved** lists). This setting eliminates any appraiser not on the approved list from being assigned orders.

Coverage. When the check box for this setting is selected, Appraisal Scope will eliminate appraisers for assignment who are not licensed for the geographical area indicated on a given order.

FHA-approved. To enable an Appraisal Scope platform-version to exclude appraisers who are not FHA approved from order assignment, select the check box for this setting. To choose whether to have the platform-version search for FHA-approved appraisers to assign for all appraisal forms or only for FHA appraisal forms, click **Options**, make a selection from the **FHA Approved – Options** box, and click **Save**.

Certified General. To enable an Appraisal Scope platform-version to exclude appraisers who are not Certified General from assignment consideration, select the check box for this setting. The number in the drop-down list will reflect the priority an AMC wants to place on this certification in relation to the Certified Residential or Licensed Residential certifications. Click the drop-down and select 1, 2, or 3 to choose whether Appraisal Scope will look for appraisers who are Certified General first, second, or third in relation to appraisers who are Certified Residential or Licensed Residential.

Certified Residential. To enable an Appraisal Scope platform-version to exclude appraisers who are not Certified Residential from assignment consideration, select the check box for this setting. Click the drop-down and select 1, 2, or 3 to choose whether Appraisal Scope will look for appraisers who are Certified Residential first, second, or third in relation to appraisers who are Certified General or Licensed Residential.

Licensed Residential. To enable an Appraisal Scope platform-version to exclude appraisers who are not Licensed Residential from assignment consideration, select the check box for this setting. Click the drop-down and select 1, 2, or 3 to choose whether Appraisal Scope will look for appraisers who are Licensed Residential first, second, or third in relation to appraisers who are Certified General or Certified Residential.

Note regarding appraisal licenses: If only one of these appraisal licenses dependencies is selected, then auto assign will only attempt to search for appraisers with this license when assigning an order. If none are found, the order will not be automatically assigned and so will need to be manually assigned. When multiple licenses are selected, Appraisal Scope will search first for appraisers who meet all other criteria, and when it filters down to license level, it will consider the license labeled 1 on its first search. If it doesn't find an appraiser with this license, it will do a second search that looks for the license labeled 2. If it finds no matches on the second search, it will then search for the licensed labeled 3.

Jobtype provided by appraiser. To enable an Appraisal Scope platform-version to exclude from assignment consideration appraisers who do not indicate in their profile that they offer the valuation product listed on the order, select the check box for this setting.

Appraisal forms. To enable Appraisal Scope to only perform auto assign for orders involving specific appraisal forms, select the check box for this setting. Choose the forms to which auto assign will be limited by clicking **Select appraisal forms**, clearing check boxes for forms that won't trigger auto assign and selecting check boxes for forms that will, and clicking **Submit**.

Profit margin percentage. To enable a platform-version to take into consideration for auto assign how much profit would be left after subtracting an appraisal fee charged by an appraiser from a total client fee, select the check box for this setting. The profit is represented by the percentage of total client fee remaining after an appraiser's quoted fee is subtracted.

- After establishing the percentage of total client fee to set as a minimum profit margin percentage, type the percentage value into the text box. Appraisers whose fees would cause the profit margin to fall below this percentage will not be considered for assignment when this setting is enabled.
- The platform-version can also be set to apply this percentage rule when assigning orders for property in a specific state, county, or zip-code. To configure Appraisal Scope to apply geographic criteria, click **Configure by state/county/ZIP** and in the **Set by State** dialog box, choose the specific geographic area(s), enter the percentage value in the relevant **Percentage, %** text boxes, and then click **Save**.

ENV capable. When the check box for this setting is selected, the platform will exclude from assignment consideration appraisers who do not indicate in their profile that they are ENV capable.

Co-op capable. This setting is useful for assigning orders to appraisers who can perform cooperative unit valuations. When the **Co-op capable** check box is selected, the platform will exclude from assignment consideration appraisers who do not indicate in their profile that they are Co-op capable.

Prevent order from auto-assigning if it is a duplicate order. When the check box for this setting is selected, the platform will not execute auto assign on duplicate orders. A duplicate order is defined by the property address being identical to the property address on any other order.

Background Check Complete. When the check box for this setting is selected, the platform will exclude from assignment consideration appraisers whose Background Check Complete status is NO.

Vendor Status. To enable Appraisal Scope to screen out appraisers for auto assignment by vendor status, select the check box for this setting. To set the vendor statuses the platform will use to screen out appraisers, click **Select status**, select or clear check boxes associated with the relevant statuses in the **Select Vendor Status** dialog box, and click **Submit**.

Note: Statuses relevant to the Vendor Status setting are configured from the Configure the Vendor Status categories setting accessed in Settings > Options > Appraiser.

Minimum CU R&W%. When the check box for this setting is selected, the platform will exclude from assignment consideration appraisers whose CU R&W% scores are equal to or less than a minimum score. To set the minimum to be used, type a CU R&W% score into the text box associated with this setting.

Maximum Late Orders. When the check box for this setting is selected, the platform will exclude from assignment consideration appraisers with a number of late orders higher than an established maximum. To set the maximum to be used, type the value in the text box associated with this setting. The **Maximum Late Orders** option considers late-order data accumulated across an AMC's platform-version to derive an appraiser's late order number.

Intended Use. When the check box for this setting is selected, the platform will not initiate auto assign if the intended use of the order does not match one of the preselected intended uses. To select intended uses to screen by, click **Select Intended Uses**, select the check boxes in the **Select Intended Use** dialog box matching the intended uses that will allow auto assign to run, and click **Submit**.

Assignment Logic group

Admin users can set conditions in the **Assignment Logic** section that will determine whether auto assign will run under certain conditions, which appraiser will be chosen from among the results returned by a platform-version, or how reassignment is handled if the first appraiser chosen for assignment doesn't accept. Note that

admin users must click **Save** at the bottom of the **Assignment Logic group** section of the page to apply the auto assign criteria selections they make here.

Prioritize approved lists. To set the platform-version to prioritize the approved lists of appraisers affiliated with a client company by admin user—set priority values, select the check box associated with this setting. The available lists can be prioritized by clicking **Manage Approved List**, numbering the lists that appear in the **Manage Approve List Priority For Auto Assign** dialog box by their order of priority for consideration, and clicking **Save**.

Prevent order from auto-assign on additional comment. When the check box for this setting is selected, orders that have text in the Additional Comments field of the order form will not be auto assigned.

Reassign to next appraiser if unaccepted after. When the check box for this setting is selected, the platform-version will automatically reassign an order to another appraiser if the assignment is not accepted within a certain amount of time. To set the time limit, type the number of hours in the text box associated with this setting.

- To choose the way that the platform-version calculates how many hours have passed since an order was first assigned, select the check box to **Calculate based on business hours** and/or to **Exclude Holidays**.
- To set the reassignment function to stop after Appraisal Scope has exhausted all available appraisers and none have accepted, leave the **Stop** option selected.
- To set the reassignment function to restart by reassigning the order to the first appraiser it was assigned to when Appraisal Scope has exhausted all available appraisers and none have accepted, select the **Restart** option.

Assign to the same appraiser when adding forms. When the check box for this setting is selected, if appraisal forms are added to an order that has been assigned to an appraiser, the same appraiser will be assigned the additional forms. To select the forms that would qualify to be assigned to the same appraiser if added to an already assigned order, click **Select appraisal forms**, clear or select check boxes associated with all relevant forms, and click **Submit**.

Exclude appraisers on vacation. When the check box for this setting is selected, appraisers who are marked as being on vacation will be excluded from order assignment consideration.

Automatically reassign immediately on decline. To have Appraisal Scope automatically reassign an order if it's declined by an appraiser, select the check box associated with this setting. If the check box is selected and **Stop** is also selected, then the platform will stop trying to auto assign when it exhausts all available appraisers in its auto assign search results. When **Restart** is selected, the platform will re-assign the order to the first appraiser who initially declined.

Add Checklist

The **Add Checklist** tab gives admin users the ability to create new checklists, duplicate and edit checklists currently in their platform-version, and assign checklists to client company profiles. Checklists assigned to a client company profile will be presented when any appraiser who accepts work ordered by that client company uploads the appraisal report.

Add new checklist and assign to client company profile

1. From the **Add Checklist** page, click **Add New Checklist**.
2. Type the new checklist name into the **Checklist** text box and click **Save**.
3. Next, click the **Select Checklists** box and select the checklist name that you've just added.
4. Click **Add Question to Checklist**, type the first question to appear on the checklist into the **Question** text box, and click **Save**.
5. Repeat this step for each question you wish to add.

6. To assign the checklist to the client company profile, click **Assign Selected Checklist** (see *Note* following instructions).
7. This checklist will now appear to an appraiser who accepts an assignment for work ordered on behalf of this client company.
Note: Any new checklist saved to your Appraisal Scope platform-version in this way will be available to clone, modify, or assign to any client company profile by choosing it from the **Select Checklists** box.

Duplicating and modifying an existing checklist

1. From the **Add Checklist** page, click the **Select Checklist** box, choose the checklist you'd like to duplicate, and then click **Clone Checklist**.
2. In the **Checklist** text box, type the name to be given to the new checklist and click **Save**.
3. To add a question to the list, click **Add Question to Checklist**, type the question into the **Question** text box, and click **Save**. Repeat this step for each question you wish to add.
4. To edit an existing question, click the **Edit** icon associated with that question, modify the question in the **Question Title** text box, and click **Save**.
5. To delete an existing question, click the **Delete** icon associated with that question.
6. To associate the checklist with a client company profile, click **Assign Selected Checklist**.
7. This checklist will now appear to an appraiser who accepts an assignment for work ordered on behalf of this client company.

To delete a checklist from the **Add Checklist** page, an admin user will click the **Select Checklist** box, choose the checklist to delete, and click **Delete Checklist**.

To change the name of a checklist from the **Add Checklist** page, an admin user will click the **Select Checklist** drop-down box, choose the checklist name to change, and click **Edit Checklist**. After the user changes the name that appears in the **Edit Checklist** text box, they will click **Save** and this checklist will now appear in the **Select Checklist** box under the new name.

Add Users

The **Add Users** tab allows admin users to add client users to a client company profile and set permissions that will be associated with this client user in the platform. For instructions on adding a new user, see the [Adding client user to an existing client company profile](#) section of the User Guide.

All client users associated with a client company profile will be listed at the bottom of the **Add Users** page, beneath the **Branch Name** header of the branch they're affiliated with. Clicking the name of a client user from the list below the **Branch Name** header will produce that user's client user profile.

This is also where admin users can give client admin user privileges to client users. To give client administrator privileges to a client user from the **Add Users** page, select the **Client Administrator** check box.

Setting user permissions

An AMC admin user or client admin user has options for setting permissions from the **Add Users** tab. These permissions give a client user visibility into orders placed by other client or broker users within the same client company. Further permissions are available here that dictate whether status notification emails will be received by the client user to whom permission has been granted.

An AMC admin user or client admin user can set a client user up with permissions. The following procedural information covers different types of permission that a client user can be granted, and the methods for setting up these permissions.

Grant client users permission to see orders placed by other client users in their client company

1. From the client company profile, click **Add Users**.

2. Go to the **Client User** list(s) at the bottom of the page under the **Branch** heading(s), find the client user you'll be granting permission to, and click **Set Permission** in the **Permission** field of the list entry. When the **Add Permission** box opens, make sure that **internal users** is selected.
3. The **Users** section in the **Add Permission** box displays a list of all client users under the client company (excluding the client user who's being granted the permission). Select the check boxes associated with the client users whose orders you want to provide visibility into.
4. Note that the names of the selected client users will now appear in the **User Permission** column, signaling that orders placed by these client users will be visible to the client user to whom you're granting permission.

Grant client users permission to see orders placed by any client users under a branch of the shared client company

1. Repeat Steps 1 and 2 of the previous procedures. The **Groups** section in the **Add Permission** box lists all branches under the client company. Select the check boxes associated with the branches whose orders you want to provide visibility into.
2. You can select all branches by clicking **Select All** in the **Groups** header.
3. To have Appraisal Scope automatically add any newly branch-affiliated client users to the permission list as they're added in a platform-version, select the **Auto Add New Group** check box in the **Groups** header.

Grant client users permission to see orders placed by any broker users affiliated with a client company

1. After accessing the **Add Permission** box by following Steps 1 and 2 of the first procedure set under Setting user permissions, make sure that you select **broker users** at the top of the box.
2. The **Broker Users** section in the **Add Permission** box displays a list of all broker users under the client company. Select the check boxes associated with the broker users whose orders you want to provide visibility into.
3. The **Brokers** section of the box displays a list of client companies that a client company has a Client on Report relationship with. Select the check boxes associated with any client companies whose orders you want to provide visibility into.

Grant client users email permission to receive status notifications for visible orders

1. After selecting the order-visibility permissions that you want to grant, select **mail permission** at the top of the **Add Permission** box.
2. In the **Internal Users** section (or **Broker Users** section; the setup in either case will be the same), click the **Please select** box and choose the user whose orders you want to trigger email notifications. If you want the email permissions to apply to all of the users you've selected previously, click **Apply to All** instead.
3. Select the check boxes for the order statuses that you want to trigger email notifications.
4. If you want to configure email settings that will automatically apply to orders placed by new users who will be subsumed into the client company in the future, click **Set Automated Mail Permission**. Set the permissions that you want to automatically apply by selecting the check boxes for the relevant order statuses.
5. When you're finished with all configurations, click **Close**.

Organizing client users by branch

Client users can be grouped together into branches under a client company profile. Branches don't necessarily need to refer to physical locations of a client company, so dividing a client company profile into branches allows the client company to establish its own criteria for what constitutes a branch. Adding branches and organizing client users under them gives client admin users and AMC admin users more choices when setting permissions for the client company, allowing more ways to divide permissions up among client-company-affiliated users.

To add new branches to a client company profile from the **Add Users** tab, an admin user will click the **Add Branch** button from the center of the menu bar at the bottom of the **Add Users** section of the page. The admin

user can enter as much information as desired into the text boxes that come up, but the only required information is **Branch Name**.

Accessing and disabling branch and client profiles from the client company profile

Once a branch is established, an admin user can view branch information by clicking **Branch Settings**, or disable the branch by clicking **Disable Branch** associated from the heading associated with a branch entry. When a branch is disabled, the branch entry will disappear, and client users within that branch will no longer have access to the platform-version. To reenabte the branch and the client user profiles under it, the admin user will click the **Show Disabled** toggle switch, and the disabled branch entry will reappear. The user will then click **Enable Branch** in the branch entry heading.

Individual client users can also be disabled without the whole parent branch needing to be disabled. An admin user will click **Disable** from the **Action** field associated with the client user entry. The user can then be reenabled by clicking **Enable**. Once a client user has been disabled, they will not appear under the branch entry until they've been reenabled or until the **Show Disabled** toggle switch has been activated.

Note: When a previously disabled branch profile has been reenabled, the client user profiles organized under it will remain disabled until they are individually reenabled.

Company Settings

The **Company Settings** tab allows an AMC and its admin users to control how orders placed on behalf of any particular client company will behave in that AMC's platform-version. Settings established from this tab will apply to the client users affiliated with that client company.

Note: Settings established from this tab will apply to all client users affiliated with a client company, except for those affiliated with a client user profile that prevails at the [client user profile level](#).

The **Company Settings** options are grouped in the following sections. Each setting is documented under the heading of the Appraisal Scope functionality that it impacts.

New Order

The **New Order** group controls the type and method of new order that a given company can place from their side of an AMC's Appraisal Scope platform. Options are chosen as follows.

Appraisal Order. To allow a company to order an appraisal by clicking **New Appraisal**, click **Enabled** in the drop-down list.

AVM Order. To allow a company to order an AVM by clicking **New Appraisal**, click **Enabled** in the drop-down list.

RealCondition Report Order. To allow a company to order a RealCondition Report by clicking the **Order RealCondition Report** option on an AVM order, click **Enabled** in the drop-down list.

Client Users

The **Client Users** group controls restrictions that an AMC can choose to place on certain functionality a client user has access to. Restrictions are set as follows.

Lock E-mail Office (Send Message). To restrict some or all of a company's client users from sending messages in **E-mail Office**, select one or more of the **Processor**, **Manager**, or **Loan Officer** check boxes in the **Select Client User Types** list and click **Save**.

Client access to award bids. To allow a queue showing bids to be seen on a client user's dashboard, click **Enabled** in the drop-down list. When **Enabled**, the **Mask Appraiser's Name & Contact Information** check box appears. Select this check box to make sure that no identifying information related to appraisers submitting bids can be seen.

Restrict users to branch. To restrict the option of order-placing client users to be able to select and place orders on behalf of other client users within a different branch, click the drop-down list and choose **Enabled–All users** or **Enabled–Loan processors and officers only**.

- When **Enabled–All users** is clicked, any client user placing an order with this client company will be restricted to selecting other client users affiliated with the same branch.
- When **Enabled–Loan processors and officers only** is clicked, a manager placing an order with this client company will be able to select any other client user affiliated with the client company, regardless of branch. The processors and officers, however, will still be restricted to only users in the same branch.

Enable domain whitelist for e-mail responses to orders. This setting allows an admin user to enable the platform to process email messages that come from domains that are whitelisted, regardless of whether the responding email address was configured for notification on the order or not. When this setting is disabled, the platform will only process responses from the email addresses set up for notification on the order.

- To enable domain whitelisting, click **Enabled** from the drop-down list. To add domains for whitelisting, click the **Domains** link to the right of the **Clipboard** icon. Type the domain names of any domains to be whitelisted in the text box at the top of the **Whitelist Domains** dialog box, click **Add**, then click **Close**.
- All domains whitelisted will appear in a list in the **Whitelist Domains** dialog box. More domains can be added in the same way for this client company profile at any time, and they can be deleted from the list by clicking the **Delete** icon associated with the entry in the **Whitelist Domains** dialog box.

New Order Form

The **New Order Form** group controls what options show up on an order form that a given client user sees. Choices on these options are made as follows.

Display Rush Order option on order form. To allow a client user to specify a rush order by allowing a rush order option to appear on the order form, select the check box to the right.

Allow override of automatic borrower delivery. To allow a client user the option to override automatic borrower delivery, select the check box to the right.

Loan Number. To choose whether the loan number field shows up on the order form, click **Show** or **Hide** in the drop-down list. If you click **Show**, choose whether a loan number will be required on a new appraisal form by clicking **Disabled** or **Enabled** from the drop-down list beneath the **Show** drop-down list. And if you want to limit the number of characters allowed in the loan number field, type the number of characters in the **Max Characters** box.

Reference Number. To choose whether the reference number field shows up on the order form, click **Show** or **Hide** in the drop-down list. If **Show** is clicked and you want to set restrictions on the number of characters allowed in the reference number field, type the number of characters in the **Max Characters** box.

Contract Document. To choose whether to make a contract document a requirement or an option for placing purchase orders, or whether to leave this item out of the order form entirely, click **Required**, **Optional**, or **Disabled** from the drop-down list.

Mail Hard Copy to Borrower/Co-borrower. To choose whether to make it optional or required that the client user mail a hard copy of the report to the borrower/co-borrower, or whether to leave this item out of the order form entirely, click **Disabled**, **Optional**, or **Required** from the drop-down list.

Display FDIC fields. To choose whether FDIC fields are displayed on the order form, click **Disabled** or **Enabled** from the drop-down list.

Hide Additional Comments/Instructions. To hide the additional comments/instructions field of the order form so that client users can't give any special direction to an appraiser, click **Enabled** from the drop-down list.

Hide Fee. To hide the fee section of the order form so that client users can't set fees in the order form, click **Enabled** from the drop-down list.

Show Manager users in the Loan Officer dropdown. To allow client users that are designated Managers to appear in the Loan Officer drop-down list of the order form, click **Enabled** from the drop-down list.

Include Time with the Due Date. To give client users the option to set a "time due" along with the due date on an order form, click **Enabled** from the drop-down list.

Require Borrower's Email Address. To choose whether a borrower's email address will be required or optional when a client user places a new order, click **Optional** or **Required** from the drop-down list.

Override Estimated Closing Date requirement. To eliminate the estimated closing date requirement for a particular company, click **Enabled** from the drop-down list.

Notified User Types Displayed On Order Form. To allow a client user placing an order to choose other client users who will receive notifications for the order placed, click the drop-down list and choose the client user type—**Processor**, **Manager**, **Loan Officer**, or all or some combination of these types—that you'd like to limit an ordering user's selection options to, then click **Save**.

Payment

The **Payment** group controls the payment methods available to a client user when they submit an order. Controls can be set up as follows.

Payment Form. To choose whether to direct client users to a payment form when they submit an order, click **Yes** or **No** from the drop-down list. If you click **Yes**, proceed to the next set of options. If you click **No**, proceed directly to the **Bill Me(Bank/Borrower) Options description**.

Payment Options.

- *Credit Card.* To make credit card payment available to client users when they place an order, make sure your Authorize.net gateway has been configured and leave the **Credit Card** check box selected.
- *Bank Account.* To allow client users to pay directly from a bank account when they place an order, select the **Bank Account** check box.
- *Send Payment Request to Your Customer.* To allow a client user to send a request for payment to their customer when they place an order, select the **Send Payment Request To Your Customer** check box. And if this check box is selected, you have the option to send payment notification to the client user by selecting the **Send completed payment notification to client** check box.
- *Bill Me.* To allow a client user to be billed when they place an order, select the **Bill Me** check box.
- *Split Credit Card Payments.* To allow for payments to be split between credit cards when a client user places an order, make sure your Authorize.net gateway has been configured and select the **Split Credit Card Payments** check box.
- *Invoice Partial Payment.* To allow for partial payment to be made when a client user places an order and for the difference to be invoiced, choose the Invoice Partial Payment check box.

Bill Me (Bank/Borrower) Options. If you select the **Bill Me** check box (see **Payment Options** above) and you want to allow the client's billing options to show when a client user places an order, click **Enabled** from the drop-down list.

Borrower Payment Options. If you allow for the client user to pass the payment request to the customer, you can choose whether options for borrower payment are strictly **Authorization** or **Authorization and Capture** by selecting one of these two option buttons.

Integrations

Appraisal Scope offers to AMCs integrations with commonly used data services. The Integrations group of controls on the Company Settings gives AMCs the ability to turn these integrations on and off by choosing **Disabled** or **Enabled** from the drop-down lists (see *Note*).

Note: A CoreLogic representative must configure integrations before they can be made available as settings from the Company Settings tab. Please contact Appraisal Scope customer support to inquire regarding integrations.

Appraisers

The Appraisers group gives AMCs options to filter appraisers by certain criteria when assigning orders or to require information from appraisers when they upload a product. Choices among these options can be made as follows.

Require appraised value. To require that an appraiser enters an appraised value before an appraisal can be uploaded to the platform, select the check box.

Require explanation from appraiser if inspection date or estimated completion date is past appraiser due date. To make sure that an appraiser gives an explanation why an inspection date or estimated completion date they enter is past an established due date, click **Enabled** from the drop-down list.

License Type. To set up the platform to check appraiser license types against those designated in the **Select License Types** filter when an order is assigned, click **Enabled** from the drop-down list.

Years of Experience. To allow an appraiser or admin user to input the number of years the appraiser has in the profession, click **Enabled** from the drop-down list.

Order Management

The **Order Management** group controls the way the platform handles orders when they're placed, whether certain information is communicated with the order details and to whom it's communicated. Options can be chosen as follows.

Set commission to zero if P&L is less than or equal to. This control gives you the option to tie sales commissions to a P&L limit. When a P&L value falls below the limit that's set, the sales commission will go to zero. To set this limit, click **Percentage** or **Flat Fee** from the drop-down list and enter the number for this percentage or flat fee in the box to the right. If you don't wish to set a limit, just make sure the value entered into the box is 0.

Put orders on hold upfront. To automatically put orders in an **On Hold** status and move them to the **On Hold** queue in the **Dashboard** when the order is placed, click **Yes** in the drop-down list. You will need to select the appraisal forms associated with orders that, when ordered, will be automatically moved to the **On Hold** queue. Click **Select appraisal forms** to the right of the drop-down box. Select the check boxes associated with the appraisal forms that will go to the **On Hold** queue when ordered and click **Submit**.

*Permission to initiate order processing (visible only if **Put orders on hold upfront** is set to **Yes**).* To choose which client user type(s) can initiate processing of an order that is automatically moved to the **On Hold** queue in accordance with the **Put orders on hold upfront setting**, select the check box associated with the appropriate client user type(s)

Minimum E&O Coverage Amount. To put a minimum limit on the E&O coverage that an appraiser must carry to be assigned an order, enter the minimum amount in the box to the right.

Fee Deduction Setting. To allow fee deductions to be made based on certain fee payment methods, click **Enabled** in the drop-down list.

Use alternative assignment & Invoice addresses. To give a client user the option to decide the address used for the invoice and/or the assignment, click **Enabled** from the drop-down list.

Set fee margin for Job Type. This control allows you to set restrictions on which appraisers can be assigned an order based on their fees. Fee margins can be set here that establish the rules that Appraisal Scope will follow. By these rules, an appraiser will only be assigned an order if their fee meets or exceeds the set margin.

These margins can be set as flat fees or percentages.

- Flat fee margin calculation: *Flat fee margin = client fee – appraiser fee.*
- Percentage fee margin calculation: *Percentage fee margin = (client fee – appraiser fee) / client fee.*

Setting fee margins by job type

1. To set restrictions on what appraisers can be assigned an order based on their fees, click on the **Set fee margin for Job Type** link.
2. In the **Jobtype Fee Margin** dialog box, choose the jobtype or types for which margins will be set.
3. Choose whether to set the fee margin as a flat fee or a percentage by clicking on **Flat** or **Percentage** from the drop-down list to the right of the **State** link.
4. If you'd like to set these margins by state, click **State** for each jobtype to which a margin will be attached and enter the value of the margin in the **Fee Margin** box next to the corresponding state and click **Submit**.
5. If you want to set default fee margins by jobtype from the **Jobtype Fee Margin** dialog box, enter the fee margin value in the **Fee Margin** box corresponding to each jobtype to be modified.
6. Click **Submit**.

Email notifications to cc all notified users on an order. To allow the platform to cc email addresses entered into the Notify other user (Email) field of the order form, click **Enabled** from the drop-down list.

Disable Order Assignment Until Balance Due is \$0.00. To keep an order from being assigned until the balance due on the order is zero, click **Enabled** from the drop-down list.

Note: This setting will not be applied to orders that have a management fee.

FHA Approved Appraisers Only. To restrict which appraisers can be assigned by Appraisal Scope to those who are FHA approved, click **Enabled** in the drop-down list.

Automate UCDP submission. To have the platform automatically submit an appraisal to the Uniform Collateral Data Portal (UCDP) when it's uploaded, click **Enabled** in the drop-down list.

Custom Billing Address. To allow an address that's different from the one a client company has on its profile to be used for billing, click **Enabled** from the drop-down list.

Automatically apply one or more order flags to all new orders. To allow all new orders to be flagged in accordance with previously configured flag configurations, click **Enabled** from the drop-down list.

Place Orders On Hold When Purchase/Sales Price varies X% from Appraised Value. To allow an order to be automatically put on hold when the purchase or sale price differs from the appraised value by at least a certain percentage, click **Enabled** from the drop-down list.

Note: In order for this setting to work, you must also have the Contract Document setting in the New Order Form section enabled, and the Require Appraised Value in the Appraiser section enabled.

Automate EAD submission. To automate the process for submission of Electronic Appraisal Deliveries (EADs), click **Enabled** from the drop-down list.

Log/Display Vendor to Client when Assigned. To allow a client to see who the appraiser assigned to an order is after the order status has changed to **Assigned**, and to allow the client to search by this vendor in **Super Search**, click **Enabled** from the drop-down list.

Appraiser Search Snapshot. To allow the *Appraiser Search Snapshot* document to be added to the **Additional Documents** section, click **Enabled** in the drop-down list.

Add Appraisal Form. To hide the **Add Appraisal Form** button that appears in the **Order Details**, click **Disabled** in the drop-down list.

Note: This setting is intended for client users placing orders via Appraisal Scope. Most integrations do not support this option.

Display CU R&W% score to Client. To make the Collateral Underwriter Representation and Warranty (CU R&W) score available to the client, click **Enabled** in the drop-down list.

Notify staff user if Appraised Value on report is less than Purchase price on order. To make sure that an assigned admin user is notified if an appraised value is less than the purchase price entered on an order, click **Enabled** in the drop-down list.

Show 'Additional Comments' field to assigned vendor. To allow any comments entered in the **Additional Comments** field to be shown to an assigned appraiser, click **Enabled** in the drop-down list.

Order Documents

The **Order Documents** group offers options to control the types of document and types of information available to display on documents. These options can be controlled as follows.

Auto generate Documents. If you want [template documents](#) to generate automatically and be added to the **Additional Documents** field when an order is completed, select the check box to the right of this option.

Automatically populate appraiser license and E&O into additional documents when the appraisal report is uploaded. To have Appraisal Scope automatically input appraiser license and E&O into the **Additional Documents** field when the appraiser uploads the report, click **Enabled** from the drop-down list.

Show Ordered For Name on Invoice. If you want the name of the entity for which the product was ordered to show up on the invoice along with their company information, click **Enabled** from the drop-down list.

Preferred date to display on invoice. To display the date an order is completed on the invoice, click **Completed Date** from the drop-down list. To display the date an order is placed on the invoice, click **Order Date** from the drop-down list.

Separate appraiser fee disclosure into its own document. If you would prefer that the appraiser fee be disclosed through a separate *Appraiser Fee Disclosure* document rather than displaying on the invoice, click **Enabled** from the drop-down list.

Note: This document can be edited by going to System Templates > Settings > Document Upload.

Client – Order Completion

The **Client – Order Completion** group offers settings that control whether the appraisal review process will be automated; if so, what parameters will be used to carry this process out; and in general, the timing and conditions of appraisal delivery to client companies and their borrowers. These settings can be controlled as follows.

Auto-Complete Order. The **Auto-Complete Order** setting should be at **Yes** if an AMC wants orders placed by the subject client company to auto-complete. Clicking the drop-down box and choosing **Yes** opens three more settings that should also be considered. Descriptions of these settings follow. If auto-complete is declined, **No** will show on the drop-down list, and an admin user should proceed to the **Delay Borrower Delivery** setting.

*Ready for Review (displays if Auto-Complete Order set to **Yes**).*

- *Notify Client.* To have Appraisal Scope automatically notify a client user when an appraisal report is ready for review, select the **Notify Client** check box. If **without report attached** appears, the report will not be automatically sent with the notification. Click **without report attached** and the text will read **with report attached**, signaling that the report will be sent automatically.
Note: The **Notify Client** check box must be selected for **Auto-Complete** to be enabled on orders that would otherwise have moved to **Ready for Review** status.
- *Notify Borrower.* If you've elected to automatically notify the client user and you wish to have Appraisal Scope notify the borrower at the same time, select the **Notify Borrower** check box. To limit notifications by jobtype, click **Job Types** under the **Notify Borrower** check box. The **Select Job Types To Auto Complete for Ready for review** dialog box will open. Clear the check boxes associated with any jobtype for which you do not wish a borrower to receive a report, then click **Save**.
- *Auto-Complete order after SSRs have been downloaded.* If you've elected to automatically notify the client user and you wish to have Appraisal Scope auto-complete an order only after Submission Summary Reports (SSRs) have been downloaded, select the Auto-Complete order after SSRs have been downloaded check box.
- *Only with CU score less than or equal to.* If you want to further refine the **Ready for Review** settings so that Appraisal Scope will auto-complete an order if the CU score meets certain parameters, select the **Only with CU score less than or equal** to check box, and enter the score limits you wish to use in the text box below it.
Note: This option is only available if you've chosen selected **Auto-Complete order after SSRs have been downloaded**.
- *After completion move to Reviewed queue.* To have Appraisal Scope automatically move a report to the Reviewed queue after it's completed, select the **After completion move to Reviewed queue** check box.

*Revision Received (displays if Auto-Complete Order set to **Yes**).*

- The settings under **Revision Received** are identical to those under **Ready for Review**. The same configuration procedures will apply.

*Reviewed (displays if Auto-Complete Order set to **Yes**).*

- The settings under **Reviewed** are nearly identical to those under **Ready for Review** and Revision Received. The same configuration procedures will apply.

Delay Borrower Delivery. To have Appraisal Scope set a delay and display a timer to show the length of the time delay before an appraisal is sent to a borrower, click **Yes** from the drop-down list. If you click **Yes**, the **Delay Timer** option appears.

*Delay Timer (displays if Delay Borrower Delivery set to **Yes**).* To set the amount of time that will pass before a borrower is sent an appraisal, click in the **hours** box and select the number of hours you wish to delay.

Merge documents. To specify when document templates will be merged with the appraisal report, click in the drop-down list to the right and choose from **at time of completion** or **at time of upload**.

Place merged documents at the. To choose where within the final deliverable the documents that are merged with the appraisal report will appear, before or after the appraisal report, click in the drop-down list to the right and choose from **Beginning of the report** or **End of the report**.

Set merged document templates. To select which document templates to merge with the appraisal report, click **Set merged document templates**. The **Merged Document Templates** dialog box will open. Select the check boxes coinciding with the templates you want Appraisal Scope to merge with the report, then click **Submit**.

Select which documents should be pre-selected on the order completion screen. This setting allows you to pre-select the document templates you wish to appear on the order completion screen when an order has been completed. The following instructions will take you through the process for selecting these documents.

1. Click **Select which documents should be pre-selected on the order completion screen** to open the **Auto Checked Documents** dialog box.
2. Click the **Select Jobtype List**, and then click the jobtype that you'd like to customize.
3. Select documents and document templates from the lists in the **Auto Checked Documents** dialog box, specifying if they will go to clients, borrowers, or both, by selecting the appropriate check boxes (and if the *Last Appraisal Report* document will be pre-selected for client delivery, choose the file formats [XML and PDF, XML, or PDF] you'd like this delivered in from the Last Appraisal Report drop-down list).
4. Click **Submit**.
5. If you'd like to customize multiple jobtypes with the same documents, instead of clicking **Submit** after choosing your documents click **Apply These Settings to Other Jobtypes** in the bottom left of the dialog box, and when the **Select Jobtype** dialog box opens, select the check boxes corresponding to the jobtypes you'd like to modify. Once you've done this, then click **Submit**.

Note: The **Check All** and **Uncheck All** buttons at the top of the **Select Jobtype** dialog box can be used to make multiple selections or de-selections more quickly. To make multiple choices easier and to save a little time, click **Check All**, and then clear only the boxes that coincide with the jobtypes you don't wish to modify.

6. If instead you'd like to modify multiple jobtypes with varying documents, after you've submitted your first pre-selected documents click **Select which documents should be pre-selected on the order completion screen** again and repeat Steps 2–4. Do this for each jobtype to be customized.

Email borrower appraisal by default. To make sure the borrower is emailed a copy of the appraisal report any time an order is completed, click **Enabled** from the drop-down list. This will pre-select the **Email to Borrower** check box when completing orders.

Change file name when emailed. This setting gives you options to have Appraisal Scope change the file name on the appraisal report when it's delivered, using more intuitive information. Select the check box to turn this setting on. To choose from a list of common file naming styles, click the drop-down list and choose a style. Alternatively, you can enter any filename you'd like the files to appear as. Click **Save** when you've made a choice.

Send document to client as. To choose whether a client company receives the final delivered documents as attachments or by link, go to the drop-down list and click **Link** or **Attachment**.

Allow Client to Email Report and Additional Documents. To allow a client company the option to email an appraisal report and additional documents after they've been delivered, click **Enabled** from the drop-down list. When enabled, a Mail button will appear for the client user on the **order completion screen**.

Borrower Delivery

The **Borrower Delivery** group provides extra choices as to what a client company can receive to verify report delivery, what borrowers might receive, and what client company details borrowers see on the platform pages they're presented with. These choices can be made as follows.

Automatically send client Delivered Certificate. To set up automatic delivery to a client company of a certificate verifying that an appraisal report or document was emailed and downloaded by a borrower, click **Enabled** from the drop-down list.

Borrower Survey. To set up automatic delivery of a survey to a borrower, click **Enabled** from the drop-down list. The text of this survey can be created or modified by going to **Settings > Emails > Borrower/Contact > Borrower Survey**.

Replace Logo with Text on Borrower Delivery & Payment pages. To display your logo to the borrower on the pages that the borrower sees, click **Enabled** from the drop-down list.

Revisions

The Revisions group provides options to limit who sees a revised report and to automate aspects of the report revision process. These options can be configured as follows.

Send revised reports to only the client user who requested the revision. To limit who receives the revised report to the client user that requested the revision, click **Enabled** from the drop-down list.

Automate the QC review for Report fields. To automate the QC review process for the report fields, click **Enabled** from the drop-down list.

Automatically check "Notify Client" when sending out a revision. To turn off the setting that auto-selects the **Notify Client** check box when a revision is sent out, or to just use the global level setting, click **Disabled** or **Use Global Setting** from the drop-down list.

Automatically check the "Checklist" button when sending out a revision. To turn off the setting that auto-selects the **Checklist** check box when sending out a revision, or to just use the global level setting, click **Disabled** or **Use Global Setting** from the drop-down list.

Instructions

The **Instructions** tab allows admin users to create, edit, and assign instructions that will be presented to an appraiser when the appraiser accepts an assignment. Instructions can be uploaded as documents, and they can be typed into the **Instructions** page.

The **Acceptance Message** section of the page displays the message that a client user will receive when a job has been accepted by an appraiser. The message can be changed and reapplied by clicking **Edit**, typing the new message into the text box, and clicking **Save**.

The **Documents** section provides admin users the option to upload instruction documents that will display to an appraiser who has accepted an appraisal order. Instruction documents that have been uploaded will appear in the **Documents** list in this area of the page.

Documents can be renamed by clicking the **Pencil and Notepad** icon, entering the new name into the **Title** box when the **Edit Document** dialog box opens, and clicking **Update**. Documents can be deleted by clicking the **Delete** icon.

When an instruction document has been added and assigned to a client company profile, an appraiser who accepts an appraisal assignment originating from this client company will be provided a link. Clicking this link downloads the instruction document listed. An admin user will assign the instruction document to a client company profile by clicking **Assign** in the **Instructions** section of the page (see details in the **Instructions** section description below).

The **Instructions** section of the page provides admin users the option to create and assign detailed instructions to an appraiser who accepts an assignment. Instructions provided in this section can be assigned by state and/or by appraisal form, giving admin users the ability to be selective about how Appraisal Scope passes along different sets of instructions to appraisers who accept orders from a client company.

Instructions appearing in the **Instructions** list can be edited at any time by clicking the **Pencil and Notepad** icon, making applicable changes in the **Edit Instruction** dialog box, and clicking **Save**. Instructions can be deleted by clicking the **Delete** icon.

Admin users can also access a log that tracks actions taken with a set of instructions over time by clicking the **Clipboard** icon.

Adding an Instruction Document to a client company profile

1. Click **Add Document**.
2. When the Add Document dialog box opens, enter a title in the **Document Title** text box.
3. Click **Browse** and double-click the document file to upload, then click **Add**.

Adding Order-Specific instructions to a client company profile

1. Click **Add Instruction** to open the **Add Instruction** dialog box.
2. To add a previously created instruction template, click **Add existing instruction template**, select a template from the drop-down to add as instructions, and then click **Close** and **Save**.
3. To add a new set of instructions, enter a title for the instructions in the **Title** text box and create the instructions in the **Template** content editor, using the style and formatting options available in the text box header to customize the text.
4. To use tags that will allow order-specific details to automatically appear in the instructions, click **Select a tag** and choose the relevant tags from the drop-down list.
5. Click **Save** when the set of instructions is complete.
6. This set of instructions will now appear in the **Instructions** list and will be assignable to the client company profile.

Assigning Instructions to a client company profile

1. In the **Action** column entry associated with the set of instructions to be assigned, click **Assign**.
2. To assign an uploaded instruction document to be attached when instructions are provided to an appraiser, in the **Mass Assign** menu box select the check box under **Client Level Documents** that's associated with the document to assign.
3. To set the platform-version to provide the instructions to appraisers when orders pertaining to specific states are accepted, select the check boxes associated with the relevant states.
4. To set the platform-version to provide the instructions to appraisers when orders for specific valuation products are accepted, select the check boxes associated with the relevant appraisal forms.
5. Click **Save** after all selections are made.

Note: For more details regarding how instructions can be created and assigned in an Appraisal Scope platform-version, see the [Instructions](#) section in the Settings chapter.

Fee Settings

The **Fee Settings** tab allows admin users to assign fee schedules to a client company profile. The fee schedules assigned to the client company determine what the fee to be paid will be for any of the valuation products offered when a client user places an order on behalf of the client company.

Assigning a fee schedule

1. To assign a fee schedule to a client company, click the **Users** tab from the main page and verify that **Client** is selected from the **Users** tab menu.
2. Search for the client company profile that will be assigned the fee schedule using the search fields on the left side of the page (see the [Client tab search functionality](#) section for more details).
3. Select the applicable client company from the list of search results to open the client company profile.
4. Click **Fee Settings** from the menu bar at the top of the client company profile.
5. Click the **Select Job List** drop-down and select the fee schedule to be applied from the list, then click **Assign Job List**.

Additional Docs

The **Additional Docs** tab allows admin users to upload and store on their platform-version any documents they'd like to associate with a client company profile. Documents can be uploaded by clicking **Select File**, providing a document type in the **Document Type** box, and clicking **Submit**. Files added in this way will display as a list on the **Additional Docs** page, and these files can be accessed or deleted from this list at any time. Any documents added here will only be visible to AMC admin users.

History

The **History** tab allows admin users to view details about in-progress orders placed on behalf of a client company. Each order is displayed as an entry on a list. Admin users can choose how many entries will be shown per page by clicking the **Per Page** drop-down box and selecting a number.

To filter the number of entries by the name of the client listed on the appraisal report, an admin user will click the **Client on Report** box and choose the relevant client name. To narrow down the entries by the status of an order, an admin user will click the **Process Status** box and choose the appropriate status from the list. Users can then export the list they've created if they choose by clicking **Export**.

To access details about a specific order or the client that's listed as **Client on Report** for an order, an admin user can click the **File #**, **Borrower Name**, or **Client on Report** fields associated with an entry in the list. Clicking the **File #** or **Borrower Name** fields of an entry will take the user to the **Status** tab menu of the **Appraisals** tab, where all general information regarding this order can be viewed, and where other functionality is available. Clicking the **Client on Report** field of the entry will take the user to the **Details** tab of the **Client on Report's** client company profile.

Client company profile subdivision: branches

A branch is both an organizational concept and a functional level within the Appraisal Scope platform. Appraisal Scope organizes client users under the branch level automatically when housing them under a client company profile. Each client company profile that's created begins with its first client user placed under the **Default Branch**. An AMC admin user can then create as many branches as necessary under the client company profile to house subsequent client users. These branches can be based on whatever criteria an AMC deems appropriate. In this way, the branch level will allow an AMC to organize client users into the subgroups that make the most sense, and if they wish, to apply settings to all users within a subgroup based on the specific needs established at the branch level.

Branches can be accessed from the **Add Users** page of any client company profile. Branches will be located at the bottom of this page, and each branch will occupy its own section on the page. To access the **Branch** menu for any branch associated with a client company, an admin user will click **Branch Settings** from the header associated with the branch they wish to modify. This will open the **Branch** page. Detailed information about other branch functionality accessible from the **Add Users** tab is available in the [Organizing client users by branch](#) portion of the *Add users* section.

BRANCH MENU AND SUBMENU

The **Branch** menu is located at the top of a **Branch** page. The tabs available on the **Branch** menu offer options for admin users to customize settings that will apply to all client users within the branch. The settings applied by admin users here, then, will determine whether order features displayed by orders coming from this branch will differ from those coming from other branches within the same client company. See the following sections for details on the options available from the **Branch** menu.

Note about the Branch and Client User Profile menus in the functional-level hierarchy: The settings that are configured via the **Branch** or Client User Profile menu will apply, respectively, only to branch users organized under the relevant branch, or to the relevant individual client user. As a consequence, if no settings are configured at the branch level or in a client user profile, then orders placed by a client user will be processed in accordance with settings configured either at the global level or at the client company level of the affiliated client company.

Branch submenu

The **Branch** submenu is located just beneath the **Branch** menu. From here, an admin user can return to the **Add Users** page of the client company profile by clicking **Back to Add Users**. An admin user can also see a history of changes made to branch information by clicking **Profile Change Log** and can make changes to the branch information stored in the platform-version by clicking **Edit**.

Branch menu tabs

Details

The **Details** tab displays branch information saved to the client user profile. Admin users can edit any of this information by clicking the **Edit** tab from the profile submenu, entering relevant changes, and clicking **Save**.

Client on Report

The **Client on Report** tab of a **Branch** page is where AMCs can manage the lenders available to be displayed on a final appraisal report ordered by a client user within that branch. In other words, client users within the branch can choose from a list created here which lender will display on the final appraisal report for an order that they place. Step by step instructions for how to create lists of lenders from which client users may designate a [Client on Report](#) are available in the Client on Report portion of the *Client Company Profile menu* section, along with details about other setting functionality.

Vendor Panels

The **Vendor Panels** tab of a **Branch** page offers admin users the ability to assign an **Approved** and/or **Do Not Use** list of appraisers to that branch. Assigning panels in this way ensures that orders placed by client users within the branch are assigned to appraisers on the **Approved** list and/or that appraisers on the **Do Not Use** list are excluded as valid order recipients.

Admin users can assign an **Approved** or **Do Not Use** list to a branch from the Vendor Panels tab by clicking the relevant drop-down box and clicking the name of the appropriate list from the choices that appear. Next, the user will click Assign List.

All **Approved** and **Do Not Use** lists assigned to a branch at any given time will display under the List Name header associated with the Add Appraiser **Approved Lists** and/or **Assign Appraiser Do Not Use** Lists sections of the page. Details on how **Approved** and **Do Not Use** lists are created can be viewed in the [Panels tab](#) section.

Add Checklist

The **Add Checklist** tab of a **Branch** page gives admin users the ability to create new checklists, duplicate and edit checklists currently in their platform-version, and then assign checklists at the branch level. Checklists specific to a branch will be presented to any appraiser that accepts work ordered by client users within that branch. For details on how to configure the **Add Checklist** settings, see the [Add Checklist](#) portion of the *Client Company Profile menu tabs* section.

Branch Settings

The **Branch Settings** tab allows an AMC and its admin users to control certain features that impact orders placed by client users within a certain branch and the types of functionality these client users will experience. Branch settings can be configured as follows.

Payment Form. To allow a platform-version to defer to payment settings chosen at the client company level when processing an order placed by a client user affiliated with a branch, an admin user can click the **Payment Form** box and select **No Payment**. The **Payment Options** controls will disappear when this choice is made. To have the platform-version immediately direct a client user placing orders from within this branch to a payment form, an admin user will leave **Branch** selected in the drop-down list and proceed to the **Payment Options** section.

Payment Options. An admin user will make selections in this section that control what options a client user ordering from a branch will have available for paying the client fee.

- To allow a client user affiliated with a branch to apply a credit card for payment, an admin user will select the **Credit Card** check box. When the **Credit Card** check box is selected, the following options apply.
 - An admin user will select **Authorize only** if he or she wants Appraisal Scope to authorize the credit card to cover the client fee but to not charge the card immediately. If this selection is made, an admin user will click **Authorized** from beside the paid status within the order details to be directed to a form where they can complete payment.
 - If the admin user selects the **Show capture on client** check box after selecting **Authorize only**, a client user will be able to click **Authorized** and be directed to the form to complete payment.
 - An admin user will select **Capture** if he or she wants Appraisal Scope to charge a credit card for the client fee at the time it's applied.
 - An admin user will select **Save payment to capture later** to have Appraisal Scope collect credit card information but not authorize or charge the card. If this selection is made, the admin user will click **Unpaid** from beside the paid status within the order details to be directed to a payment form where they can complete the payment.
- To allow a client user affiliated with a branch to use a bank account for payment, an admin user will select the **Bank Account** check box.
- To have Appraisal Scope send an email with a link to an online payment form to the customer of a client user affiliated with a branch, an admin user will select the **Send Payment Request To Your Customer** check box.
 - If the admin user selects the **Send completed payment notification to client** check box after selecting **Send Payment Request To Your Customer**, the ordering client user will receive an email notification when the customer has completed the payment.
- To invoice an ordering client user for the payment due, an admin user will select the **Bill Me** check box. When this option is selected, the invoiced payment will show as unpaid in the **Unpaid** tab of the **Accounting** page. The admin user will have Appraisal Scope generate an invoice and email it to the ordering client user from the **Unpaid** tab.
- To allow payment of the client fee to be split among multiple credit cards, an admin user will select **Split Credit Card Payments**.
- To allow partial payment via credit card and to invoice the difference, an admin user will select the **Invoice Partial Payment** check box. The portion of the payment to be invoiced will be processed from the **Unpaid** tab of the **Accounting** page.

Auto-Complete Order. To configure a platform-version to automatically complete an order placed by a client user affiliated with a branch, an admin user will click the **Auto-Complete Order** box and click **Yes**. This setting works in conjunction with settings placed at the client company functional level (See previous [Auto-Complete Order](#) entry).

Delay Borrower Delivery. To have a platform-version delay delivery of an appraisal report to a borrower for an order placed by a client user affiliated with a branch, an admin user will click the **Delay Borrower Delivery** box and click **Yes**.

Allow Client to Email Report and Additional Documents. To give client users affiliated with a branch the ability to email an appraisal report and additional associated documents to recipients of their choice, an admin user will click the **Allow Client to Email Report and Additional Documents** box and select **Enabled**.

Borrower Payment Options. An admin user will make selections in this section that control how a platform-version handles credit card information supplied by a borrower to apply to a client fee for an order placed by a client user affiliated with a branch.

- An admin user will select **Authorize** if he or she wants Appraisal Scope to authorize a credit card supplied by a borrower to cover a client fee but to not charge the card immediately.
- An admin user will select **Authorize and Capture** if he or she wants Appraisal Scope to authorize and then charge the credit card to cover the client fee.

Allow Client Users To Select AMC. This setting is specific to Lenders who use Appraisal Scope to manage the AMCs they do business with. A Lender admin user can choose here whether another Lender User affiliated with a branch will be required to select an AMC when creating an order or not. To require a Lender User affiliated with a branch to select an AMC when creating an order, the Lender admin user will click the **Allow Client Users To Select AMC** box and click **Enabled**. To not require the Lender User to select an AMC, an admin user will click the **Allow Client Users To Select AMC** box and choose either **Optional** or **Disabled**.

Instructions

The **Instructions** tab of the **Branch** page allows admin users to create, edit, and assign instructions that will be presented to an appraiser when the appraiser accepts an assignment for an order placed by a client user affiliated with a branch. Instructions for this purpose can be uploaded as documents, and they can be typed into the **Instructions** page. The process impacting **Instructions** here is identical to the process for the client company profile, and detailed procedures can be found in the [Instructions](#) portion of the *Client Company Profile menu tabs* section.

Fee Settings

The **Fee Settings** tab of the **Branch** page allows admin users to assign fee schedules that will apply for orders placed by a client user affiliated with a branch. The process impacting **Fee Settings** here is identical to the process for the client company profile, and detailed procedures for assigning a fee schedule can be found in the [Assigning a fee schedule](#) section.

Auto Assign

The **Auto Assign** tab of a **Branch** page gives admin users options to set configurations that will impact how orders placed by client users affiliated with a branch will be assigned based on factors specific to the branch with which the client user is affiliated. Criteria set here will determine how Appraisal Scope chooses appraisers it assigns to valuation products ordered by the client users within the branch. Please see the [Auto Assign](#) portion of the Client Company Profile menu tabs section above for details on how to configure the **Auto Assign** options.

Client user profile

The client user profile is where a client user's relevant details and custom order settings are stored. The client user profile is the level closest to the user in the functional level hierarchy, and when client users place orders, Appraisal Scope will take settings configured at the client user profile level into account first, before acting on settings that might apply at the branch, client company, or global levels. Another way of driving the functional level aspect of the client user profile home is to say that where specific settings have been configured for a client user, these settings will prevail over any potentially contradictory settings at the branch, client company, or global levels.

Every client user profile in a platform-version will be connected with a client company profile. The client user profiles will be organized beneath the branch level of the client company profile. When a client user places an order, Appraisal Scope will process the order based on the client user settings, and then branch, client company, and global level settings will dictate, in that sequence, how aspects of the order not covered by client user settings are processed.

ACCESSING THE CLIENT USER PROFILE

A client user profile can be accessed in two ways. First, an admin user can access a client user profile through any **Client Company** list produced using the **Search** options on the **Client** page. The user will click the **plus** icon to the far left of an entry on the **Client Company** list. This will open a drop-down list of the client users organized under the client company profile. Clicking on any client user from the drop-down will open their client user profile.

A client user profile can also be accessed from the **Add Users** page of the client company profile. To access a client user profile here, an admin user will click on the name of the client user from the **Branch Name** section under which the user is organized.

Note: Client users will, by default, be organized under **Branch Name: Default Branch** if no branch names have been created for a client company profile.

Any time a client user profile is directly accessed, a user will be able to toggle between this client user profile and the client company profile with which it's affiliated. An admin user will click **Company Profile** on the **Client User Profile** submenu to access the client company profile. To get back to this client user profile, an admin user will click **Go back to [Client User Name Here] profile** on the **Client Company Profile** submenu.

CLIENT USER PROFILE MENU AND SUBMENU

The **Client User Profile** menu is located at the top of the **Client User Profile** page. The tabs available on the **Client User Profile** menu offer options for admin users to customize individual client user profiles. The settings applied by admin users here, then, will determine whether the order features displayed by an individual client user's order will differ from other client users within the same branch of the same client company. See the following sections for details on the options available from the **Client User Profile** menu.

Client User Profile submenu

The **Client User Profile** submenu is located just beneath the **Client User Profile** menu. The tabs available on this submenu offer options for admin users to edit or disable the profile, send platform-version login details to the client user, and set permissions that will control what a client user sees on their dashboard and whether they get email notifications for orders that other client users in their client company place. The functionality of each submenu tab is explained below.

Company Profile. To access the profile of the client company with which the client user is affiliated, an admin user will click **Company Profile**.

Client :: User. To change a client user from a standard client user to a client admin, click **Client :: User**. Along with giving Client Admin permissions to a client user, this action will also toggle the button, which will then read **Client :: Admin**. Clicking this button again will return client-user-level permissions to the client user and will toggle the button back to its original appearance.

Edit. To edit the general information associated with a client user, an admin user will click **Edit** and enter all relevant details to be changed under the **Edit Client Profile** header. When finished, the user will click **Save**.

Send Login. To send a client user their Appraisal Scope platform-version login credentials, an admin user will click **Send Login**.

Settings Summary. To view a summary of the settings that are applied to a client user profile, an admin user will click **Settings Summary**. The **Settings Summary** dialog box will open, revealing the settings impacting orders placed by the client user. An admin user can choose to see what if any checklists, instructions, or appraiser **Approved** and **Do Not Use** lists are being applied; the **Client on Report** settings that prevail; the fee schedule assigned to this client user; and the payment option settings that are available for the user. The user will click on the type of setting in the menu at the top of the **Settings Summary** box for information related to the setting. The box will also denote the setting level—Company, Branch, or Client—the particular setting is being applied from.

Profile Change Log. To view a history of the changes that have been made to a client user profile, an admin user will click **Profile Change Log**.

Permission. To set permissions that impact the email notifications and order details that a client user is provided, an admin user can click **Permission** from this submenu, or alternatively the admin user can access these permission settings from the **Add Users** tab on the **Client Company Profile** menu. See details regarding these permission settings and available functionality in the [Setting user permissions](#) section.

Disable/Enable (terminology dependent on status [Active or Disabled] of client user profile). To disable a client user profile, an admin user will click **Disable** in the submenu. A client user in a Disabled status won't be able to access the platform-version of Appraisal Scope until an admin user reenables his or her client user profile. To reenable a disabled client user profile, an admin user will click **Enable** in the submenu.

Client User Profile menu tabs

Details

The **Details** tab displays client user information saved to the client user profile. Admin users can edit any of this information by clicking the **Edit** tab from the profile submenu, entering relevant changes, and clicking **Save**.

Show Notes

The **Show Notes** tab offers a location for AMCs to keep notes related to specific client users.

To add and manage notes from a client user profile, click **Add Notes** on the far-right side of the **Notes** header. A text editor offering several style options will open. After a note has been created, click **Save**.

Notes associated with a client user will be displayed in separate boxes under the **Notes** header. Details on the admin user who created the note and the date and time the note was created are displayed in the header for each note. The notes will be organized chronologically, with the most recently created note appearing first. Any note can be edited or deleted by clicking on the **Edit** or **Delete** icon on the right side of the header for that note.

Note: Notes kept under the **Show Notes** tab are only accessible by AMC staff. These notes do not display to client users.

Client on Report

The **Client on Report** tab of a client user profile is where AMCs can manage the lenders available to be displayed on a final appraisal report ordered by that client user. In other words, client users can choose from a list created here which lender will display on the final appraisal report for an order that they place. Step by step instructions for how to create lists of lenders from which client users may designate a Client on Report are available in the [Client on Report](#) portion of the *Client Company Profile menu* section, along with details about other setting functionality.

Vendor Panels

The **Vendor Panels** tab of a client user profile offers admin users the ability to assign an **Approved** and/or **Do Not Use** list of appraisers to that client user profile. Assigning panels in this way ensures that orders placed by the client user are assigned to appraisers on the **Approved** list and/or that appraisers on the **Do Not Use** list are excluded as valid order recipients.

Admin users can assign an **Approved** or **Do Not Use** list to a client user profile from the **Vendor Panels** tab by clicking the relevant drop-down box and clicking the name of the appropriate list from the choices that appear. Next, the user will click **Assign List**.

All **Approved** and **Do Not Use** lists assigned to a client user profile at any given time will display under the **List Name** header associated with the **Add Appraiser Approved** Lists and/or **Assign Appraiser Do Not Use** Lists sections of the page. Details on how **Approved** and **Do Not Use** lists are created can be viewed in the [Panels tab](#) section.

Auto Assign

The **Auto Assign** tab of a client user profile gives admin users options to set configurations impacting how orders placed by the client user will be assigned based on factors specific to the client user or client company with which the client user is affiliated. Criteria set here will determine how Appraisal Scope chooses appraisers it assigns to valuation products ordered by this client user. Please see the [Auto Assign](#) portion of the *Client Company Profile menu tabs* section for details on how to configure the **Auto Assign** options.

Add Checklist

The **Add Checklist** tab of a client user profile gives admin users the ability to create new checklists, duplicate and edit checklists currently in their platform-version, and then assign checklists at the client user level. Checklists specific to a client user profile will be presented to any appraiser that accepts work ordered by that client user. For details on how to configure the Add Checklist settings, see the [Add Checklist](#) portion of the *Client Company Profile menu tabs* section.

User Settings

The **User Settings** tab allows an AMC and its admin users to control certain features that impact a client user's orders placed on the AMC's platform-version and the types of functionality these client users will experience. An admin user can choose the functional level from which their platform-version will draw certain materials or apply fee, payment, and other settings; the types of communication a client user will receive; and the permissions the client user will have to acquire or send appraisal documents, all from the **User Settings** tab. User Settings can be configured as follows.

Instructions. To set the functional level from which a platform-version will pull its set of instructions when a client user places an order, an admin user will click the **Instructions** box and select **Company Instructions**, **Branch Instructions**, or **Individual Instructions**.

Approve Appraiser. This is not a setting but a notification that shows what level a platform-version is drawing the setting choices from.

Checklist. To set the functional level from which a platform-version will pull a checklist to assign when a client user places an order, an admin user will click the **Checklist** box and select **Company Checklist, Branch Checklist, or Individual Checklist**.

Client on Report. To set the functional level from which a platform-version will pull the Client on Report options available to a client user when placing an order, an admin user can click the **Client on Report** box and select **Company Client on Report, Branch Client on Report, or Individual Client on Report**.

Email Notification Permission. An admin user can control which email notifications a client user will receive for orders in which they are designated as a notified user by selecting the check boxes associated with the notifications they will receive when they're a designated notified user on an order, and clearing the check boxes associated with notifications they won't receive when they're a designated notified user on an order.

Lock User's Ability to Change Email Permissions. An admin user can remove a client user's ability to change their email permissions by clicking the **Lock User's Ability to Change Email Permissions** drop-down box and clicking **Yes**. When **Yes** is selected here, the **Email Notification Permission** check boxes will not appear among the client user's available platform-version controls.

Lock Documents. An admin user can disable a client user's ability to download appraisal reports and other documents from a platform-version by clicking the **Lock Documents** drop-down box and clicking **Yes**.

Lock New Appraisal Request. An admin user can prohibit a client user from placing new appraisal orders by clicking the **Lock New Appraisal Request** drop-down box and selecting **Yes**. When **Yes** is selected here, the **New Appraisal** button will not appear among the client user's controls.

Read-only. To prevent a client user from being able to edit an order's details, an admin user will click the **Read-only** drop-down box and click **Yes**.

Lock Revision Requests. To prohibit a client user from requesting revisions to an appraisal report on a platform-version, an admin user will click the **Lock Revision Requests** drop-down box and click **Yes**.

Auto-Complete Order. To set the functional level from which a platform-version will pull the **Auto-Complete Order** settings when a client user places an order, an admin user will click the **Auto-Complete Order** box and select **Company, Branch, or Individual**.

Delay Borrower Delivery. To set the functional level from which a platform-version will pull the **Delay Borrower Delivery** settings when a client user places an order, an admin user will click the **Delay Borrower Delivery** box and select **Company, Branch, or Individual**.

Allow Client to Email Report and Additional Documents. An admin user can choose the functional level from which to draw permission settings that will prohibit or allow a client user to email an appraisal report and additional documents by clicking the **Allow Client to Email Report and Additional Documents** box and choosing **Company, Branch, or Individual**.

Override branch user restriction. To override for a client user the **Restrict users to branch setting** that's set at the client company level, click the **Override branch user restriction** drop-down box and choose **Enabled**.

Borrower Payment. To set the functional level from which a platform-version will pull the **Borrower Payment** settings when a client user places an order, an admin user can click the **Borrower Payment** box and select **Company, Branch, or Individual**.

Auto Assign. To choose from which functional level the Auto Assign configurations will pull when assigning an order that a client user places, an admin user can click the **Auto Assign** box and select **Company, Branch, or Individual**. To configure a platform-version to not auto-assign orders placed by a client user, an admin user will click the **Auto Assign** box and click **Do not auto assign orders**.

Fee Schedule. This is not a setting but a notification that shows what level a platform-version is drawing the setting choices from.

Payment Form. An admin user can choose the functional level from which to draw payment settings when a client user places an order by clicking the **Payment Form** box and choosing **Company**, **Branch**, or **Individual**. The admin user can also choose to allow a client user to place an order without requiring payment by clicking **No Payment** from the list.

If an admin user clicks **Individual**, the **Payment Options** controls will appear.

Instructions

The **Instructions** tab of the client user profile allows admin users to create, edit, and assign instructions that will be presented to an appraiser when the appraiser accepts an assignment for an order placed by a client user. Instructions for this purpose can be uploaded as documents, and they can be typed into the **Instructions** page. The process impacting **Instructions** here is identical to the process for the client company profile, and detailed procedures can be found in the [Instructions](#) portion of the *Client Company Profile menu tabs* section.

Fee Settings

The **Fee Settings** tab of the client user profile allows admin users to assign fee schedules that will apply for orders placed by a client user. The process impacting **Fee Settings** here is identical to the process for the client company profile, and detailed procedures for assigning a fee schedule can be found [above](#).

Appraiser tab

APPRAISER TAB SEARCH FUNCTIONALITY

Staff users can access appraisal companies and appraisers contained in their platform-version by using the **Search** section on the left side of the **Appraiser** page. Clicking **Search** at the bottom of the **Search** section will produce a list of appraiser companies and associated appraisers, known frequently from here on as vendor companies and vendor users. Clicking **Clear** will clear all search fields or return them to their default settings.

Vendor User lists will appear just beneath the **Search** section. A staff user can refine search results by specific location or coverage area by clicking **Location** or **Coverage**, just above the **Search** and **Clear** buttons. The length of any list can be controlled with the available search criteria.

Staff users can search by license type, for example **Certified General** or **Certified Residential**, by a numerical quality rating, by the name of an appraisal company, or by an appraiser's **Vendor Status**. They can also search for an individual vendor user by typing an appraiser's name, license number, or email address into the relevant boxes. A staff user can also refine the results of a list to include only vendor users that have been licensed for a certain amount of time by entering years licensed into the **Years Licensed** box.

Staff users can find specific vendor companies, as well, by either typing into the **Appraiser Company** text box, or clicking the **Appraiser Company** drop-down box and selecting a vendor company from the list. Lastly, staff users can choose to filter results by a quality rating, clicking the **Quality** box and choosing from the list of rating numbers, and they can also filter results by clicking the **Vendor Status** box and choosing from among statuses.

INTERACTING WITH APPRAISER SEARCH RESULTS

A list of vendor companies or vendor users will be returned as search results. The entries that comprise a list will differ slightly depending on the type user that the entry is associated with. For vendor company entries and entries associated with individual vendor users affiliated with vendor companies, information will be broken across three fields. The right-hand field will display whether the entry reflects a vendor company, or whether it's that of a vendor user who is affiliated with a company. When the entry is that of a vendor user affiliated with a vendor company, the right-hand field will display the level of permissions the user has with

that company (e.g., Manager and RFP).

In the case of a vendor company entry, staff users may note a blue **Plus** icon in the **No.** field. When a staff user clicks the **Plus**, a list will appear that shows all of the vendor users contained within the vendor company profile. Staff users will need to point to the vendor user name they wish to select. Clicking the vendor user name will open either the **General Information** page of a vendor user profile, which itself is affiliated with a vendor company profile (this will be the case for the vendor user who signed up with an AMC's platform-version on behalf of a vendor company, often a Manager), or the **Details** page of a vendor company profile. When a **General Information** page of a vendor user profile is opened in this scenario, clicking the **Company Profile** tab will open the vendor company profile to the **Details** page.

For an entry associated with a vendor user who is not associated in a platform-version with a vendor company, the entry will be broken into five fields under **No.**, **Name**, **Cert.**, **FHA**, and **Rating**. The **No.** field gives staff users access to the **Approved** and **Do Not Use** lists that the vendor user has been placed on. To see these lists, a staff user will click the **Green-Square-Over-Red-Square** icon under the **No.** header on the search results list. The **[Appraiser Name] Approved / Do Not Use** Lists box will open, displaying any lists the appraiser is on by client company. The client company names will appear beneath either the **Appraisers – Approved** or **Appraisers – Do Not Use** headers, depending on which of the two list types an appraiser has been added to for a client company. The **No.** field will also show a white-on-red **Exclamation Point** icon if there is anything in the vendor user's profile that would potentially impact their ability to perform an appraisal, for instance if their E&O coverage has expired.

Moving along the vendor user entry columns to the right, the **Cert.** field will reflect the vendor user's certification status, the **FHA** field will notify a staff user if the vendor user is FHA certified, and the **Rating** field will reflect the Appraisal Scope rating that the vendor user carries.

When an admin user clicks on any of the vendor user entries in the list, the vendor user profile will open to the **Details** page. The **Vendor User Profile** menu and submenu will be accessible.

ADDING AN APPRAISAL COMPANY BY CREATING A NEW VENDOR COMPANY PROFILE

1. To create a new vendor company profile from the **Appraiser** tab, click **New Company**, located adjacent to the **Search** header.
2. In the **Add New Company** page, enter all information requested with a red asterisk into the adjacent text boxes and choose a state from the **State** drop-down list.
3. All other requested information can be added but isn't required.
4. If you'd like to upload an E&O insurance document to associate with the profile, click **Select File**, choose a locally stored document from your browser's file directory, and click **Open**.
5. The uploaded document will appear under the **Select File** button.
6. After you've entered all desired information, click Sign Up to add the vendor company profile to your platform-version.

EXPLAINING THE APPRAISER APPRENTICE ROLE AND ASSOCIATED APPRAISAL SCOPE PROFILE

The ASC does not recognize license status for appraisal trainees, known in Appraisal Scope as Appraiser Apprentices. As a consequence, this user type cannot sign up to the platform themselves, but instead an appraiser apprentice profile must be created by an admin user.

An appraiser apprentice cannot be linked in Appraisal Scope to a licensed vendor user acting as the trainee's supervising appraiser. However, an apprentice can be housed in the same vendor company profile as the supervising vendor user, and when this is the case, the supervising vendor user can be associated via the **Order Details** page to an order that's been assigned to the appraiser apprentice.

An admin user should note that an appraiser apprentice must be assigned to a vendor company when the appraiser apprentice profile is created. If the apprentice's supervising vendor user is not affiliated with a vendor company, the admin user will need to create a vendor company profile and add the supervising vendor user to the profile before adding an appraiser apprentice to the Appraisal Scope platform-version (see the [Adding a manager to a vendor company profile](#) section).

Adding an appraiser apprentice to an Appraisal Scope platform-version

1. To add an appraiser apprentice from the **Appraiser** tab, click **Add Appraiser Apprentice**, located adjacent to the **Search** header.
2. At a minimum, enter all information in text boxes where it's requested with a red asterisk.
3. When all appropriate information has been entered, click **Next**.
4. When the **Coverage Section** page opens, click **Add New**.
5. Under the **Edit Coverage Area** header, click the **State/Province** drop-down box and choose the state containing the Appraiser Apprentice's coverage area.
6. Enter the Trainee License number in the **License#** text box, enter the expiration date of the license, and click **Select File** to select a license document to upload.
7. Finally, select the check boxes associated with the counties that the Appraiser Apprentice will be working in.
8. After everything is complete, click **Save**.

Adding an appraiser apprentice to a vendor company profile under branch

1. To add an appraiser apprentice to a vendor company profile, choose a vendor company profile from a search results list.
2. When the profile page opens, click the **Add Users** tab and find the **Branch Name** header associated with the branch that will house the appraisal apprentice.
3. Click **Add Appraiser Apprentice** to open the **Add Appraiser Apprentice** page.
4. Enter the apprentice's first name in the **First Name** text box, if known, and choose the appropriate name from the drop-down list that appears under the box. The **License Number** text box and other associated fields will auto fill when this name is selected.
5. If the first name is not known, enter the apprentice's Trainee License number in the **License Number** text box, as well as any further details that you feel are necessary in the text boxes that are available to fill.
6. Leave the **Notify User** check box selected if you'd like to email platform-version credentials to the appraiser apprentice; otherwise, clear the check box.
7. When you're finished, click **Add Appraiser Apprentice**.

Vendor company profile

The vendor company profile is where a vendor company's locational details and bank account information are stored. An admin user can access from the Company profile the vendor user profiles that are housed under the vendor company, and the admin user can determine whether a fee assignment setting should be controlled at the vendor company functional level.

A vendor company profile can be accessed by clicking the name of a company from any search results list on the **Appraiser** page.

VENDOR COMPANY PROFILE MENU AND SUBMENU

The **Vendor Company Profile** menu is located at the top of the **Vendor Company Profile** page. The tabs available on this menu offer customization options for vendor company information to be stored in a platform-version. Admin users also have the option to turn on a setting that will have Appraisal Scope automatically calculate an appraisal fee at the vendor company functional level for jobs assigned to a vendor company.

Vendor Company Profile submenu

The **Vendor Company Profile** submenu is located just beneath the larger **Vendor Company Profile** menu. Admin users can either edit or delete an existing vendor company profile by clicking the appropriate button, or they can see if the QuickBooks sync is active from the icon on the **QB Sync**: tab.

Vendor Company Profile menu tabs

Details

The **Details** tab displays vendor company information saved to the vendor company profile. All information is visible under a **General Information** header. Admin users can edit any of this information by clicking the **Edit** tab from the profile submenu, entering relevant changes, and clicking **Save**.

Add Users

The **Add Users** tab allows admin users to add vendor users to a vendor company profile and set permissions that will be associated with this vendor user in the platform. For instructions on adding a new user to a vendor company, see the [Adding a manager to a vendor company profile](#) and [Adding an appraiser to a vendor company profile](#) sections.

All vendor users associated with a vendor company profile will be listed at the bottom of the **Add Users** page, beneath the **Branch Name** header of the branch they're affiliated with (see *Note regarding vendor company profile branches* following this section). Clicking the name of a vendor user from a list below the **Branch Name** header will produce that user's vendor user profile.

The vendor users category is broken into subtypes in Appraisal Scope. Vendor users within a vendor company can be Managers or Appraisers. The Managers in a vendor company receive orders assigned to the vendor company, and they then assign these orders to Appraisers within their vendor company. Note that there is no requirement that a vendor user in the Management role have a License Number associated with their profile.

Admin users can also search for individual vendor users on a **Vendor Company Profile** page using the **Search** fields and the **Branch** drop-down box that are located in the center of the page, beneath the **Add Manager** and **Add Branch** buttons.

Note regarding vendor company profile branches: Vendor users will be organized in a vendor company profile under Default Branch unless a new branch is added to a vendor company profile.

Vendor company profile branches

An admin user can add a branch to a vendor company profile by clicking **Add Branch**, located next to the **Add Manager** button, beneath the **Notify** check box. The user will enter the name they want to give the branch into the **Branch Name** text box and click **Save**. The branch will now appear at the bottom of the **Add Users** page and will be available to select from the **Branch** drop-down boxes affiliated with the **Add Manager** and **Search** sections of the **Add Users** page.

The vendor user entries organized under vendor company profile branches will reflect the roles that we mentioned early in the User Guide, in the portion of the [User profiles](#) section that deals with vendor users. The **User Type** field associated with a list of vendor users organized under a branch will denote whether a vendor user was added to the vendor company profile as Manager or Appraiser. Admin users will also find that the options for modifying the vendor user entries here are slightly different depending on User Type.

For entries associated with vendor users who were added as Managers, an admin user can access and assign permissions by clicking **Set Permission**. When the **Add Permission** dialog box opens, the admin user can choose to apply permissions to all members of a particular branch by selecting a check box associated with any or all branches under the **Groups** header, or they can choose to apply permissions by individual vendor user by selecting check boxes associated with vendor user names under the **Users**.

After all selections have been made, the user can review what vendor users have been given permission under the **User Permission** header, and then click **Close** to return to the vendor company profile. Admin users also can select the **RFP Manager** check box affiliated with a Manager user entry to give RFP Manager privileges to the Manager. When a Manager has been given RFP Manager privileges, the **User Type** field for the entry will read **Manager & RFP Manager**.

For entries associated with vendor users who were added as Appraisers, admin users can select the **Appraiser Manager** check box to give an Appraiser the Appraiser Manager privileges. When this option is selected, the **User Type** field associated with the entry will read **Appraiser Manager**. This action will also make the same **Set Permission** options available that were available in the case of the Manager user.

The admin user can also select the **RFP Manager** check box affiliated with the Appraiser's entry. In a case where the **Appraiser Manager** check box has already been selected, this action will add RFP Manager privileges to the Appraiser Manager privileges, which will be reflected as **Appraiser Manager & RFP Manager** in the **User Type** field. In a case where the **Appraiser Manager** check box is clear, meaning the **RFP Manager** check box alone is selected, the Appraiser will be given RFP Manager privileges, which will be reflected as **Appraiser & RFP Manager** in the **User Type** field.

Admin users can also remove any individual vendor user from an associated branch by clicking **Delete** from the **Action** field, located in the far-right column of a vendor user's entry. The ability to remove whole branch profiles is also available to admin users when they click **Delete** from the right side of the **Branch Name** header, as is the ability to disable a branch for a period of time by clicking the **Active** toggle, which will afterward read **Disabled**.

Adding a manager to a vendor company profile

1. To add a manager to a vendor company profile, click the name of a vendor company from the **Appraiser** tab search results list, and then click the **Add Users** tab when the vendor company profile opens.
2. Type the relevant requested information into each text box under the **Add Manager** header. When you assign the password, make sure it's a minimum of eight characters and consists of at least one uppercase letter, one lowercase letter, and one number or symbol.

Note 1: All text boxes from **First Name** to **Email** must be filled in for a new manager to be added to the vendor company profile.

3. If the vendor company profile is divided into branches, click the **Branch** drop-down list and select the branch to which you'd like the manager to be added.

Note 2: If the vendor company profile that you're adding a new manager in hasn't been divided into branches yet, and you'd like to add the new manager to a new branch other than Default Branch, you must add the new branch to the vendor company profile first.

4. Finally, click **Add Manager** to add the new manager to the vendor company profile.

Please be aware: The Notify check box will be selected so that your platform-version notifies the new manager via email of their login credentials. If this is not required, you can clear the check box to disable this email.

Adding an appraiser to a vendor company profile.

1. To add an Appraiser to a vendor company profile from the **Add Users** page, click **Add Appraiser** from under the **Branch Name** header of the branch you'd like to associate the Appraiser with (see Note following these procedures).
2. Begin by typing information that you have available regarding the Appraiser's personal information into the **License Number**, **Email Address**, **First Name**, or **Last Name** text box, and choose the correct Appraiser from the drop-down list that appears below the text box that you're typing in.

3. Completing Step 2 will trigger your platform-version to auto-populate all other essential fields on the **Add Appraiser** page.
4. When information has been entered into all text boxes, click **Add Appraiser**.
5. The Appraiser will now show up on the **Add Users** page under the branch.

Note: An appraiser must be registered on your platform-version before they are available to add to a vendor company profile.

Company Setting

The **Company Setting** tab is where admin users can make choices that will apply if a vendor company is assigned an order. Choices made here impact vendor users who are assigned orders through a vendor company.

Fee setting

Calculate appraiser fee based on percentage (%) of client fee. To set a platform-version to calculate the appraiser fee by a percentage of the client fee, an admin user will click the drop-down box and select **Enabled**.

If **Enabled** is selected, the user will enter the percentage to base the appraiser fee on in the Percentage of client fee text box.

Tech Fee. If an admin user wants to disable the Tech Fee for appraisals assigned to a vendor company, they will click the drop-down box and select **Disable**. When the Tech Fee is disabled and therefore not covered by the appraiser, the AMC will be charged the fee for any order involving that appraiser.

W9 and E&O

Pay Company W9 or appraiser W9. An admin user can choose which W9 to use when calculating withholdings for fees paid to orders assigned to a vendor company, a vendor company W9 or a vendor user W9. To make this choice, a user will click the drop-down box and choose **Company W9** or **Appraiser W9**.

Use Company E&O or Appraiser E&O. An admin user can choose whether to use a vendor company's E&O coverage or a vendor user's E&O coverage for an order assigned to a vendor company by clicking the drop-down box and choosing **Company E&O** or **Appraiser E&O**.

ACH Information

The **ACH Information** tab allows AMCs to keep bank account information on file for a vendor company. To add information, a user will click **Update**, fill in the relevant text boxes, and then click **Save**.

W9 Information

The **W9 Information** tab allows AMCs to keep W9 information on file for a vendor company. A user will enter relevant W9 information directly into the form available on the **W9 Information** page and will then click **Save**.

Pending Orders

The **Pending Orders** tab allows admin users to view order details and statuses that have been assigned to a vendor company.

History

The **History** tab allows admin users to view details on orders that have been completed by a vendor company.

Vendor user profile

The vendor user profile is where admin users can access information and modify certain settings related to individual appraisers who are registered in their platform-version. A vendor user profile can be accessed by clicking the name of an appraiser from any search results list on the **Appraiser** page.

VIEWING AND CHANGING VENDOR USER STATUS

Besides the customization and information available through the **Vendor User Profile** menu and submenu (covered below), an admin user can also see if a vendor user profile is active at a given time. This status is displayed in the upper right-hand corner of the vendor user profile.

Admin users can also disable or enable vendor user profiles and document an appraiser's vacation status to reflect when the appraiser will be unavailable. These tasks can be carried out as documented in the following procedures.

Disabling and enabling an appraiser's vendor user profile in a platform-version

1. To disable an appraiser from an Appraisal Scope vendor user profile, click the green **Appraiser** toggle icon in the upper right-hand corner of the profile and enter a message in the **Reason for Appraiser Disabled** dialog box.
Note: Disabling an appraiser generates an email that will be sent out to relevant admin users notifying them that the vendor user profile has been disabled. The message entered into the **Reason for Appraiser Disabled** dialog box will be accessible in the **Show Notes** section of the appraiser's vendor user profile.
2. The vendor user profile for this appraiser will then be moved to the **Disabled** tab, located on the **Users** tab menu, and the vendor user status will read **Appraiser is not active**.
3. To enable a vendor user profile that's under the **Disabled** tab, navigate to the **Disabled** tab from the **Users** tab menu and click the **Appraiser** toggle icon, now showing clear.
4. This action will change the appraiser's status back to **Appraiser is active, not on vacation**, and it will move the vendor user profile back under the **Appraiser** tab.

Changing an appraiser's vacation status from a vendor user profile

1. To change an appraiser's vacation status from an Appraisal Scope vendor user profile, click the clear **Suitcase** toggle icon in the upper right-hand corner of the profile.
2. In the **Appraiser Vacation Details** dialog box, select **On** for **Vacation Status**, and then enter dates in the **Vacation Start Date** and **Vacation End Date** text boxes.
3. When you've entered the relevant dates, click **Save**.
4. The **Suitcase** toggle icon will now show green, and the vendor user status will read **Appraiser is active, on vacation**.
5. After the **Vacation End Date** passes, the **Suitcase** toggle icon will again show clear, and the vendor user status will read **Appraiser is active, not on vacation**.
6. You can also access the **User Vacation Log** to see details about when vacation statuses were documented and by whom by clicking **Vacation History**.

VENDOR USER PROFILE MENU AND SUBMENU

The **Vendor User Profile** menu is located at the top of the **Vendor User Profile** page. The tabs available on this menu offer a vendor user's platform-version registration details, information related to the user's appraisal licenses and certifications, and customization options for the vendor user information that's stored in a platform-version.

Vendor User Profile submenu

The **Vendor User Profile** submenu is located just beneath the **Vendor User Profile** menu. The tabs available on this submenu offer options for admin users to edit a vendor user profile and send platform-version login details to the User, as well as view certain information related to configurations impacting a vendor user profile. The functionality of each submenu tab is explained below.

Edit. The **Edit** tab offers extensive options to change information that's saved in a vendor user's profile as well as upload new documents to associate with a vendor user.

There's also an option to set a **Max Orders** value on a vendor user here by entering it in the **Max Orders** text box, after which an admin user will need to choose how their platform-version will behave when the appraiser has reached their max orders value. An admin user will need to select from the choices to **Use global setting for manual order assignment past max orders value**, **Warn and allow assignment**, or **Prevent assignment**.

Much of the information changed here will be reflected in the profile view that's available under the **Details** tab of the **Vendor User Profile** menu (see the Vendor User Profile menu tabs section directly following this one).

Approved / DNU Lists. To view what, if any, **Approved** and **Do Not Use** lists a vendor user is included on, an admin user can click the **Approved / DNU Lists** tab of the submenu. This action will open a dialog box that displays all lists of this type that the appraiser has been included on.

Send Login. To send a vendor user their Appraisal Scope platform-version login credentials, an admin user will click **Send Login**.

Receive Bids – On. This tab reflects whether a vendor user can receive bids at a given time, and when an admin user clicks on the tab, this permission will be removed and the tab will toggle to read **Receive Bids – Off**, reflecting that the vendor user can no longer receive bids.

Profile Change Log. An admin user can click on the **Profile Change Log** tab to view what types of changes have been made to a vendor user profile, when they were made, and who made them.

QB Sync. For AMC's utilizing a QuickBooks integration (see QuickBooks under Accounting), admin users can see from the **QB Sync** tab whether the vendor user is synced. Green on the embedded **QB** icon indicates that the company is synced, while white/grey indicates that it's not.

Vendor User Profile menu tabs

Details

The **Details** tab displays vendor user information and documents that are saved on an AMC's Appraisal Scope platform-version.

The **Details** page will also display documents uploaded to, or modified directly through, the vendor user profile, as well as information that can help an AMC track an appraiser's performance on orders that originate from that AMC's platform-version.

Vendor users are able to modify certain fields that appear under the **Details** tab from their platform interface. They can edit their contact information, upload a resume, and fill in or edit their W9 details, and this information will be saved to an AMC's platform-version.

Vendor users can also upload sample appraisal reports showing their work to the **Details** page by clicking **Select File** in the **Appraisal Reports** section toward the bottom of the page and choosing files to upload.

Admin users can also see if and when a vendor user has accepted the Appraisal Scope End User License Agreement on the **Details** page. The date of acceptance and a link to the PDF version of the agreement can be seen at the bottom of the page, under the **End User License Agreement** header.

Documents and analytics available on the Details page

Resume. An admin user can access a vendor user's resume from the **Details** tab by clicking **Resume Document** in the first section of the page next to **Resume**. A user can also email a resume by clicking the **Envelope** icon, entering an email address in the **Send Information** dialog box, and clicking **Send**.

W9 Details. An admin user can access a vendor user's W9 by clicking **W9** in the first section of the page next to **W9 Details**. Both vendor and admin users can also edit a W9 by clicking the **Pencil and Notepad** icon to the right of the **W9** link, altering the information to be modified in the relevant text boxes, and clicking **Save**.

Quality. An admin user can access details about a vendor user's quality rating from the **Details** tab by clicking the **Quality** link in the first section of the page. This will open the **Quality Rating** page.

The Quality Rating is an assessment of a vendor user's work given by a staff user after review or completion of an order. These ratings are given on a scale from one to five stars, with five stars being the best.

An AMC can require that staff users rate vendor users for quality by going to **Settings > Options > Appraiser Assignment**, finding and choosing **Require Appraiser ratings prior to setting Reviewed status** and/or **Require Appraiser ratings prior to order completion**, and selecting **Enable** from the appropriate drop-down box.

Service. An admin user can access details about a vendor user's service rating from the **Details** tab by clicking the **Service** link in the first section of the page. This will open the **Service Rating** tab.

The service rating is an assessment of a vendor user's work given by an admin user after review or completion of an order. These ratings are given on a scale from one to five stars, with five stars being the best.

An AMC can require that staff users rate vendor users for service by going to **Settings > Options > Appraiser Assignment**, finding and choosing **Require Appraiser ratings prior to setting Reviewed status** and/or **Require Appraiser ratings prior to order completion**, and selecting **Enable** from the appropriate drop-down box.

Turn around time. An admin user can access details about a vendor user's turn around time rating from the **Details** tab by clicking the **Turn around time** link in the first section of the page. This will open the **Turn Around Time Rating** page.

The turn around time rating is an assessment of how quickly a vendor user fulfills an order after it's been accepted. This rating can be given by an admin user after review or completion of an order, or it can be automatically given when a platform-version has been configured to rate vendor user turn around time automatically.

An AMC can configure how they would like this rating determined by going to **Settings > Options > Appraiser Assignment**, finding **Set how the Appraiser Turn Time rating is calculated**, and making the appropriate selections there.

Customer Rating. An admin user can access details about a vendor user's customer rating from the **Details** tab by clicking the **Customer Rating** link in the first section of the page. This will open the **Internal Rating** page. The customer rating is derived from the overall scores given by borrowers when rating their experience with a vendor user at the time of inspection. The customer rating, then, is dependent on the **Borrower Survey** setting being enabled (see the [Borrower Survey](#) entry under the *Borrower Delivery* section for details).

CU Score. An admin user can access details about a vendor user's CU score from the **Details** tab by clicking the **CU Score** link in the first section of the page. This will open the CU Score page.

RealView Quality Score. An admin user can access details about a vendor user's RealView Quality Score from the **Details** tab by clicking the **RealView Quality Score** link in the first section of the page.

RealView Complexity Score. An admin user can access details about a vendor user's RealView Complexity Score from the **Details** tab by clicking the **RealView Complexity Score** link in the first section of the page.

RealView Value Score. An admin user can access details about a vendor user's RealView Value Score from the **Details** tab by clicking the **RealView Value Score** link in the first section of the page.

Statistics. An admin user can access statistics specific to a vendor user from the **Details** tab by clicking the **Bar Graph** icon to the right of **Statistics**. Clicking the icon produces a bar graph representation of seven

statistical categories that track the behavior of a vendor user on a platform-version with regard to how often they accept assigned orders and how well they fulfill the orders.

A scorecard is also available to admin users that will show how a vendor user is performing across 13 statistical categories, organized into columns and tracked and compiled by month. Hovering over a **Question Mark** icon associated with a header on the scorecard table yields an explanation of how the value for a given statistical category is calculated. To access a scorecard, a user will click the **Scorecard** icon to the right of the **Bar Graph** icon, which will open the **Scorecard** dialog box.

Admin users can exclude weekends in the statistical calculations by selecting the **Exclude Weekends** check box at the top of the **Scorecard** dialog box. They can also choose to define *On Time* as meaning an appraisal form completed by the due date or uploaded by the due date by clicking the drop-down list under the **Exclude Weekends** check box and choosing **On Time % (Completed by the due date)** or **On Time % (Uploaded by the due date)**.

E&O Insurance Document. An admin user can access information about a vendor user's E&O coverage from the **Details** page by clicking the **E&O Insurance Document** link beneath the **E&O Details** section of the page. A user can also email this document by clicking the **Envelope** icon, entering an email address in the **Send Information** dialog box, and clicking Send.

Appraiser Questionnaire. An admin user can see how a vendor user has answered questions regarding E&O from the **Details** page by clicking the **Appraiser Questionnaire** link. A vendor user's responses to these questions can be seen in the **E&O Questions** dialog box that opens.

Show Notes

The **Show Notes** tab displays a list of notes associated with a vendor user. The list will show notes that were added manually by an admin user, and also notes that reflect changes that have been made to a vendor user's status on an AMC's platform-version. Each entry in the list will display the admin user who created the note or made the status change and when they did it.

An admin user can add a note by clicking **Add Notes** from the right-hand side of the **Notes** header. The user will type and format the note in the text box. If a user wants to make sure that the note is visible when assigning an order, they should select the **Flag** check box. When finished, the admin user will click **Save** to add the note to the vendor user's profile.

Each entry in the **Notes** list can be flagged. When a note is flagged for a vendor user, a **Clipboard** icon will display under the **Notes** column of the **Appraiser Assign** search results when the vendor user appears in the results. The admin user assigning the order can click on the icon to see the contents of the note.

Each entry in the list can also be edited or deleted by clicking the **Edit** or **Delete** icon.

Coverage/License

The **Coverage/License** tab displays the specific states and counties that a vendor user performs appraisals in. An admin user can add to this list by clicking **Add Another State** from the right-hand side of the **Coverage Areas** header. When the **New Coverage Area** form opens, the user will select the new state and enter a license number, expiration date, and type. A license document can be added to the profile by clicking **Select File**, choosing the file to upload, and clicking **Open**. Clicking **Save** will add the new coverage area to the vendor user's profile.

The settings for **Automatic FHA Roster Management** can also be modified for a vendor profile from the **Coverage/License** page. An admin user can leave the **Automatic FHA Roster Management** drop-down list on **Use Global Setting**, or a user can click on the box and choose **Enabled for this Profile** or **Disabled for this Profile**.

An admin user also has the option to edit a vendor user's **Coverage Areas** information by clicking the **Edit** icon in the **Action** column. When the **Edit Coverage Area** form opens, the admin user can make and save changes to the information that will be reflected in the vendor user's profile.

Appraisal Forms

The **Appraisal Forms** tab is where an admin user can see what jobtypes a vendor user is available to perform. This list is available for either vendor users to modify from their platform-interface, or admin users to modify from their platform-version. Users will select or clear the check boxes associated with the relevant jobtypes in the list. Admin users can also keep a vendor user from updating their fees by selecting the **Lock fee update for appraiser** check box.

Fee Settings

The **Fee Settings** tab offers a few fee setting options that an admin user can choose. An admin user can set a platform-version to calculate the appraiser fee for a vendor user as a percentage of the client fee. To do this, the admin user will click the **Calculate appraiser fee based on percentage (%) of client fee** drop-down list and select **Enabled**. This will bring up the **Percentage of client fee text box**, where the user will enter the percentage value that will be used to calculate the appraiser fee.

An admin user can also disable the tech fee on orders assigned to a vendor user by clicking the **Tech Fee** drop-down list and choosing **Disable**. And in the **Supervisor Fee Settings** section, an admin user can set their platform-version to calculate an appraiser supervisor fee based on a percentage of the client fee. This option will be set in the same way as the appraiser fee above.

Pending Orders

The **Pending Orders** tab displays a list with details for all orders assigned to a vendor user, including the status of an order. Admin users can choose a specific list entry to view by typing details in the **Name**, **Address**, or **File#** text boxes, or they can narrow the list down by choosing a client from the **Client** drop-down list or a jobtype from the **Job Type** drop-down list.

History

The **History** tab displays a list with details for all orders completed by a vendor user. Admin users can choose a specific order to view by typing specific details in the **Name**, **Address**, or **File#** text boxes, or they can narrow the list down by choosing a client from the **Client** drop-down list or a jobtype from the **Job Type** drop-down list.

Additional Docs

The **Additional Docs** tab offers a repository for additional appraiser documents associated with a vendor user. An admin user can upload documents by clicking **Select File**, choosing a file to upload, and then clicking **Open**. Uploaded files will be displayed in the list on the page, and a user can access a document by clicking on it in the **File** column.

AMC tab

The **AMC** tab gives an AMC a place to manage a relationship they might have with another AMC. The **AMC** tab is only available on a platform-interface after it's been turned on by a member of the Appraisal Scope team. Please contact Customer Support for more information.

If an AMC has been configured to use the **AMC** tab, they will be able to assign orders to a secondary AMC that they have a relationship with. An AMC vendor user profile for the secondary AMC will be kept in the primary AMC's Appraisal Scope platform-version. Admin users from the primary AMC will then be able to go to this location to find information related to the secondary AMC, as well as any orders that this secondary AMC has been assigned.

In order for a primary AMC to assign an order to a secondary AMC, the secondary AMC must be registered in the Appraisal Scope directory as an AMC. The secondary AMC receiving orders from a primary AMC does not, however, need to have this AMC-to-AMC integration enabled to receive and manage orders from the primary AMC. From the secondary AMC's perspective, an order assigned this way will appear and be managed the same as any other order.

An admin user will click on an entry from the search results list in the **AMC** tab to access an AMC vendor user profile. The **AMC** page menu offers many of the same options for interacting with the profile that are available for the vendor profiles associated with appraisers. In order to deactivate an active AMC profile, a user will click **Active** from the page menu. For AMC profiles that have been disabled, an admin user will click **Disabled** to make the profile active again.

SETTINGS

The **Settings** tab in the AMC page menu offers the following four main options and a secondary option that are available to turn on by selecting the check boxes.

Submit payment to AMC. When the **Submit payment to AMC** setting is on, the secondary AMC handling the assignment will receive the payment submitted by the client company.

Use AMC's Fee Schedule. When the **Use AMC's Fee Schedule** setting is on, the secondary AMC's client fee for a given jobtype will be used. The primary AMC will be able to view this fee in the client fee field of the order details on their platform-version.

Accept fee changes from this AMC. When the **Accept fee changes from this AMC** sub-setting is turned on, the primary AMC is allowing the secondary AMC to institute fee changes.

Use updated due dates from this AMC. When the **Use updated due dates from this AMC** setting is turned on, the secondary AMC will be able to adjust due dates.

Display AMC file number and assigned appraiser details from this AMC. When the **Display AMC file number and assigned appraiser details from this AMC** setting is turned on, the primary AMC will be able to see the AMC file number and details about the assigned appraiser from the secondary AMC.

Directory tab

The **Directory** tab gives admin users access to the Appraisal Scope Directory. The Appraisal Scope Directory is made up of all appraisers and AMCs who have at any point in time registered on an Appraisal Scope platform-version. The profiles associated with the appraisers and AMCs in the directory will include details on the geographic areas they cover and the licenses they hold.

Admin users can access appraiser and AMC profiles by using the **Search** section on the left side of the **Directory** page. When searching for an appraiser, an admin user will need to make sure that **Search Appraiser** appears at the top of the panel, and if it doesn't, the user should click the **Appraiser** link to the right of the search header. For an AMC search, **Search AMC** should appear atop the search control panel, and if it doesn't, the admin user should click the **AMC** link next to the **Appraiser** link.

As with other Appraisal Scope search control panels, admin users can produce a list of results by clicking **Search**. The list of results will appear just beneath the search control panel. If a user needs to continue searching, clicking **Clear** will remove any search criteria from the search panel fields. An admin user can also produce a list of results that excludes appraisers who are already registered on their platform-version by selecting the **Exclude Registered Appraisers** check box and narrowing down by search criteria from there.

The length of the list of results can be controlled by using the text boxes and drop-down menus in the control panel. Admin users searching for appraisers can look for specific appraiser profiles by name, license number,

years licensed, or by the zip code that's associated with the appraiser. Admin users can also search for appraisers within an appraiser company. Users can narrow a list of results by using the **State**, **County**, and **License Type** drop-down lists, as well. Admin users searching for AMCs can narrow down a list by typing in the name, phone number, or license number of the AMC they're looking for.

APPRAISAL SCOPE DIRECTORY: APPRAISER PROFILES

An appraiser profile gives an admin user information about an appraiser's geographic coverage area, a rundown of certificates held, and a list of appraisal forms that he or she services with associated fees. Admin users can access an appraiser profile by clicking the entry associated with the appraiser from a list of **Directory** page search results.

Each appraiser profile has a main menu of tabs and a submenu of tabs. To view an appraiser's contact information, information about their E&O coverage, and details about their certifications, how long they've been certified, and the expiration date of the certification, an admin user will click the **Details** tab on the main menu. Information about the geographic areas an appraiser covers is available from the **Coverage / License** tab. And an admin user can see what appraisal forms an appraiser offers and the fee that's associated from the **Appraisal Forms** tab.

An admin user can invite an appraiser to register on a platform-version by clicking **Invite Appraiser** from the tab submenu. This button will change to show a status of **Invite Sent** after the invitation has gone out. After this appraiser has registered, the button will change to read **Registered**.

An admin user can also simply register an appraiser on their platform-version by clicking **Register** on the tab submenu. And finally, an admin user can see what **Approved** and **Do Not Use** lists an appraiser is on by clicking **Approved / DNU Lists** on the tab submenu.

Note: The preferred method for registering a new vendor user on an Appraisal Scope platform-version is to invite an appraiser. If an admin user does register the vendor user without invitation, it's recommended that they ask the appraiser to review his or her information in the platform-version in case any profile details need to be updated.

APPRAISAL SCOPE DIRECTORY: AMC PROFILES

An AMC profile gives an admin user information about an AMC's geographic coverage area, a rundown of states and provinces where their AMC license is valid, and a list of appraisal forms that they service. Admin users can access an AMC profile by clicking the entry associated with the AMC from a list of **Directory** page search results.

Each AMC profile has a main menu of tabs and a submenu with a **Register** tab. To view an AMC's contact information and a list of states and provinces where their AMC license is valid, an admin user will click the **Details** tab on the main menu. Information about the geographic areas an AMC covers is available from the **Coverage / License** tab. And an admin user can see what appraisal forms an AMC services and the fees associated with them from the **Appraisal Forms** tab.

An admin user can also register an AMC on their platform-version by clicking **Register** on the submenu.

ASC tab

The **ASC** tab gives admin users access to the nationwide ASC database. The profiles associated with the appraisers in the ASC database will include details on the geographic areas they cover and the licenses they hold.

Admin users can access ASC profiles by using the search control panel on the left side of the **ASC** page. Admin users will need to enter at least one search parameter before clicking **Search** to produce a list of results from

the ASC database. The list of results will appear just beneath the search control panel. If a user needs to continue searching, clicking **Clear** will remove any search criteria from the search panel fields.

The length of the list of results can be controlled by using the text boxes and drop-down menus in the control panel. Admin users searching for appraisers can look for specific appraiser profiles by name, license number, years licensed, or by the zip code that's associated with the appraiser. Admin users can also search for appraisers within an appraiser company. Users can narrow a list of results by using the **State**, **County**, and **License Type** drop-down lists, as well.

ASC PROFILES

An ASC profile gives an admin user information about an appraiser's geographic coverage area and a rundown of the certificates they hold. Admin users can access an ASC profile by clicking the entry associated with the appraiser from a list of **ASC** page search results.

Each ASC profile has a main menu of tabs and a submenu of tabs. To view an appraiser's contact information, information about their E&O coverage, and details about their certifications, how long they've been certified, and the expiration date of the certification, an admin user will click the **Details** tab on the main menu. Information about the geographic areas an appraiser covers is available from the **Coverage / License** tab.

The **Show Notes** tab allows an admin user to view any notes that have been added previously for an appraiser and also to add notes to an ASC profile by clicking **Add Notes**, typing and formatting in the **Notes** dialog box, and clicking **Save**. Notes added here can also be flagged by selecting the **Flag** check box. When an appraiser from an ASC profile list is registered with an AMC platform-version, the notes added here will be accessible in the appraiser's vendor profile under the **Notes** tab.

The **Appraisal Forms** tab displays a list of standardized appraisal forms. Admin users will not see any fees associated with these forms, and so this list serves as an administrative reference for the standardized appraisal forms list.

An admin user can invite an appraiser on the ASC database to register on their platform-version by clicking **Invite Appraiser** from the tab submenu. This button will change to show a status of **Resend Invitation** after the invitation has gone out. After this appraiser has registered, the button will change to read **Registered**.

An admin user can also simply register an appraiser on their platform-version by clicking **Register** on the tab submenu. And finally, an admin user can see what **Approved** and **Do Not Use** lists an appraiser is on by clicking **Approved / DNU Lists** on the tab submenu.

Note: The preferred method for registering a new vendor user on an Appraisal Scope platform-version is to invite an appraiser. If an admin user does register the vendor user without invitation, it's recommended that they ask the appraiser to review his or her information in the platform-version in case any profile details need to be updated.

Disabled tab

The **Disabled** tab gives admin users a search control panel to locate vendor users who have been disabled in an AMC's Appraisal Scope platform-version. Admin users can access profiles of disabled vendor users by using the search control panel on the left side of the **Disabled** page.

As with other Appraisal Scope search control panels, admin users can produce a list of results by clicking **Search**. The list of results will appear just beneath the search control panel. If a user needs to continue searching, clicking **Clear** will remove any search criteria from the search panel fields.

The length of the list of results can be controlled by using the text boxes and drop-down menus in the control panel. Admin users searching for disabled vendor users can look for specific profiles by name, years licensed,

or by the appraiser company that the vendor user is associated with. Users can also narrow a list of results by using the **State**, **Vendor Status**, **License Type**, and **Quality** drop-down lists.

When a vendor user is disabled in an Appraisal Scope platform-version, this user will no longer be active and so cannot have orders assigned to them. The user will also not be able to log in to the Appraisal Scope platform-version.

The number that appears in the **Disabled** tab represents the number of disabled vendor users on an Appraisal Scope platform-version. Procedures for reactivating a vendor user who is in a Disabled status can be viewed in the [Disabling and enabling an appraiser's vendor user profile in a platform-version](#) section.

Panels tab

The **Panels** tab gives AMCs the functionality to organize the vendor users on their platform-version into lists that will help them make sure that they're always assigning orders to the appraisers best suited to handle a job. Admin users can create, edit, and delete appraiser **Approved** and **Do Not Use** lists from the Panels page, as well as search for vendor users to see the **Approved** and **Do Not Use** lists that they're associated with at any given time.

PANELS TAB SEARCH FUNCTIONALITY

Admin users can use the text box fields and drop-down lists in the search control panel on the left side of the **Panels** page to search for appraisers registered on their AMC's platform-version (see Note following this paragraph). Users can perform a search by name, appraiser company, or license number; or they can narrow a list of search results by Quality Rating, state covered, county covered, or License Type. Admin users can also click **Advanced Search** to search by email or zipcode, or to narrow search results by selecting from the additional certifications.

Note: The drop-down box located just above the search control panel must read Select a panel type in order to perform this general search.

Search results will display a list of entries that include an appraiser's name and address, whether the appraiser is affiliated with an **Approved** or a **Do Not Use** list, and the client company that the **Approved** or **Do Not Use** list is assigned to. For appraisers associated with multiple **Approved** or **Do Not Use** lists, there will be separate entries in the search results for each list that the appraiser is affiliated with.

ADDING AND MODIFYING APPROVED LISTS

Admin users can add or modify **Approved** lists from the **Panels** tab by clicking the drop-down box located just above the search control panel that reads **Select a panel type**. When admin users click the drop-down box and choose **Appraisers – Approved**, a full list of ASC certified appraisers will appear beneath the search control panel. This list can be narrowed down or individual appraisers can be searched for by using the options in the search control panel.

Clicking **Appraisers – Approved** from the drop-down list will also open the **Appraisers – Approved** section on the right side of the Panels page. Admin users will find controls available here that will allow them to select **Approved** lists that they'd like to add appraisers to, edit the names of existing **Approved** lists, import new **Approved** lists they receive from client companies, and delete existing **Approved** lists. Admin users can also look to see the client users an **Approved** list is assigned to. Procedural descriptions for each task available to admin users are presented below.

Deleting an Approved list, or editing an Approved list name

Admin users can delete an **Approved** list from the **Appraisers – Approved** section of the **Panels** page by clicking the **Select List Name** drop-down box, and then clicking both the name of the list and **Delete**. Admin users can also edit the name of an **Approved** list by choosing the list as above, clicking **Edit List Name** and

entering the new list name in the **New Appraiser List** text box, and clicking **Save**.

Adding appraisers to an existing Approved list

1. From the **Appraisers – Approved** section of the **Panels** tab, click the **Select List Name** drop-down box and choose the name of the list you want to modify.
2. To add appraisers to this **Approved** list, go to your search results list beneath the search control panel and select the check boxes that coincide with the appraisers that you want to add, then click **Approve**.
3. A new entry associated with this appraiser will appear in the **Approved** list on the **Appraisers – Approved** section of the **Panels** page.

Building a new Approved list

1. From the **Appraisers – Approved** section of the **Panels** tab, click **Add New List** and enter the name of the new list in the **New Appraiser List** text box, then click **Save**.
2. Next, click the **Select List Name** drop-down box and choose the list name you just created.
3. From your search results list beneath the search control panel, select the check box that coincides with each appraiser that you want to add to this new **Approved** list, then click **Approve**.
4. All entries that are added to the new **Approved** list will appear on the **Appraisers – Approved** section of the **Panels** page as they're added.

Note: Although these procedures offer a valid method for creating an **Approved** list, it's recommended that the *Importing an Approved List* procedures be followed when longer lists are required.

Importing an Approved list

1. If the list you're importing will be imported under a list name that already exists in your platform-version, click the **Select List Name** drop-down box from the **Appraisers – Approved** section of the **Panels** tab and choose that list name.
2. If the list you're importing will be imported under a new name, click **Add New List**, enter the name of the new list in the **New Appraiser List** text box, then click **Save**. Next, click the **Select List Name** drop-down box and choose the list name you just created.
3. After a list name has been selected, click **Import List** to open the **Required Columns** list.
4. The **Required Columns** list reflects the three different column configurations that are available to use as headings in your CSV file (see Note 1). The CSV file, then, should have in it either the information shown in the first three elements in the **Required Columns** list, the information shown in the second two elements, or the information shown in the last four elements (see Note 2).

Note 1: The requirements for importing an **Approved** list via the **Panels** tab are similar to those for importing a fee schedule. Please see the [Requirements for importing a fee schedule](#) section for details regarding the CSV file type and a discussion of headers and the importance of mapping.

Note 2: Although the column configurations chosen will ultimately be up to the admin user, it is the preference of the Appraisal Scope team that the last four elements of the **Required Columns** list be used if possible, and if not possible then the second two elements of the list, and then if needed the first three elements of the list. Also, please note that the numbers displayed alongside the entries in the **Required Columns** list on the Appraisal Scope platform are unimportant.

5. When your CSV file is prepared, click **Select File**, choose the file you want to upload, and click **Open**.
6. Two columns will appear: **Imported File** and **Approved Appraiser Fields**. The **Imported File** column displays the header names that are in your imported file, and the **Approved Appraiser Fields** column displays the standard headers recognized by Appraisal Scope.
7. Click and drag each header name under **Imported File** to the standard header that it corresponds to under **Approved Appraiser Fields**. This process is carried out to make sure that the headers in the imported file are mapped to Appraisal Scope's standard headers (see Note1).

- Click **Start Import**. When the message **The Approved Appraiser List has imported successfully!** appears, click **Close**.
- Your **Approved** list will now be available to view by clicking the list name from the Select List Name drop-down menu.

Viewing the client companies and associated users that are assigned an Approved list

Admin users can view the client companies and associated users that an **Approved** list has been assigned to from the **Appraisers – Approved** section of the **Panels** page by selecting a list name from the **Select List Name** drop-down menu and then clicking **Assigned**. A dialog box will open displaying the client company, branch user, and client user profiles that an **Approved** list is assigned to.

Adding or removing all Registered Appraisers from an Approved list

An admin user can add all vendor users from their platform-version to an **Approved** list at once by selecting a list name from the **Select List Name** drop-down menu, clicking the **Add or Remove all registered appraisers** drop-down list, and selecting **Add all registered appraisers to this list**. Admin users can also remove all vendor users included in an **Approval** list at the same time by clicking the **Add or Remove all registered appraisers** drop-down list and selecting **Remove all appraisers from this list**.

ADDING AND MODIFYING DO NOT USE LISTS

Admin users can add or modify **Do Not Use** lists from the **Panels** tab by clicking the drop-down box located just above the search control panel that reads **Select a panel type**. When admin users click the drop-down box and choose **Appraisers – Do Not Use**, a full list of ASC certified appraisers will appear beneath the search control panel. This list can be narrowed down or individual appraisers can be searched for by using the options in the search control panel.

Clicking **Appraisers – Do Not Use** from the drop-down list will also open the **Appraisers – Do Not Use** section on the right side of the **Panels** page. Admin users will find controls available here that will allow them to select **Do Not Use** lists that they'd like to add appraisers to, edit the names of existing **Do Not Use** lists, add new **Do Not Use** lists, and delete existing **Do Not Use** lists. Admin users will also be able to create new **Do Not Use** lists and see what client users a **Do Not Use** list is assigned to. Procedural descriptions for each task available to admin users are presented below.

Deleting a Do Not Use list, or editing a Do Not Use list name

Admin users can delete a **Do Not Use** list from the **Appraisers – Do Not Use** section of the **Panels** page by clicking the **Select List Name** drop-down box, and then clicking both the name of the list and **Delete**. Admin users can also edit the name of a **Do Not Use** list by choosing the list as above, clicking **Edit List Name** and entering the new list name in the **New Appraiser List** text box, and clicking **Save**.

Adding appraisers to an existing Do Not Use list

- From the **Appraisers – Do Not use** section of the **Panels** tab, click the **Select List Name** drop-down box and choose the name of the list you want to modify.
- To add appraisers to this **Do Not Use** list, go to your search results list beneath the search control panel and select the check boxes that coincide with the appraisers that you want to add, then click **Don't Use**.
- A new entry associated with this appraiser will appear in the **Do Not Use** list on the **Appraisers – Do Not Use** section of the **Panels** page.

Building a new Do Not Use list

- From the **Appraisers – Do Not Use** section of the **Panels** tab, click **Add New List** and enter the name of the new list in the **New Appraiser List** text box, then click **Save**.
- Next, click the **Select List Name** drop-down box and choose the list name you just created.

3. From your search results list beneath the search control panel, select the check box that coincides with each appraiser that you want to add to this new **Do Not Use** list, then click **Don't Use**.
4. All entries that are added to the new **Do Not Use** list will appear on the **Appraisers – Do Not Use** section of the **Panels** page as they're added.

Note: Although these procedures offer a valid method for creating a **Do Not Use** list, it's recommended that the *Importing a Do Not Use List* procedures be followed when longer lists are required.

Importing a Do Not Use list

1. If the list you're importing will be imported under a list name that already exists in your platform-version, click the **Select List Name** drop-down box from the **Appraisers – Do Not Use** section of the **Panels** tab and choose that list name.
2. If the list you're importing will be imported under a new name, click **Add New List**, enter the name of the new list in the **New Appraiser List** text box, then click **Save**. Next, click the **Select List Name** drop-down box and choose the list name you just created.
3. After a list name has been selected, click **Import List** to open the **Required Columns** list.
4. The **Required Columns** list reflects the three different column configurations that are available to use as headings in your CSV file (see Note 1). The CSV file, then, should have in it either the information shown in the first three elements in the **Required Columns** list, the information shown in the second two elements, or the information shown in the last four elements (see Note 2).

Note 1: The requirements for importing a **Do Not Use** list via the **Panels** tab are similar to those for importing a fee schedule. Please see the [Requirements for importing a fee schedule](#) section for details regarding the CSV file type and a discussion of headers and the importance of mapping.

Note 2: Although the column configurations chosen will ultimately be up to the admin user, it is the preference of the Appraisal Scope team that the last four elements of the **Required Columns** list be used if possible, and if not possible then the second two elements of the list, and then if needed the first three elements of the list. Also, please note that the numbers displayed alongside the entries in the **Required Columns** list on the Appraisal Scope platform are unimportant.

1. When your CSV file is prepared, click **Select File**, choose the file you want to upload, and click **Open**.
2. Two columns will appear: **Imported File** and **Do Not Use Appraiser Fields**. The **Imported File** column displays the header names that are in your imported file, and the **Do Not Use Appraiser Fields** column displays the standard headers recognized by Appraisal Scope.
3. Click and drag each header name under **Imported File** to the standard header that it corresponds to under **Do Not Use Appraiser Fields**. This process is carried out to make sure that the headers in the imported file are mapped to Appraisal Scope's standard headers (see Note1).
4. Click **Start Import**. When the message **The Do Not Use List has imported successfully!** appears, click **Close**.
5. Your **Do Not Use** list will now be available to view by clicking the list name from the **Select List Name** drop-down menu.

Viewing the client companies and associated users that are assigned a Do Not Use list

Admin users can view the client companies and associated users that a **Do Not Use** list has been assigned to from the **Appraisers – Do Not Use** section of the **Panels** page by selecting a list name from the **Select List Name** drop-down menu and then clicking **Assigned**. A dialog box will open displaying the client company, branch user, and client user profiles that a **Do Not Use** list is assigned to.

Adding or removing all Registered Appraisers from a Do Not Use list

An admin user can add all vendor users from their platform-version to a **Do Not Use** list at once by selecting a list name from the **Select List Name** drop-down menu, clicking the **Add or Remove all registered appraisers**

drop-down list, and selecting **Add all registered appraisers to this list**. Admin users can also remove all vendor users included in a **Do Not Use** list at the same time by clicking the **Add or Remove all registered appraisers** drop-down list and selecting **Remove all appraisers from this list**.

Pending Users

The **Pending Users** page allows admin users to approve or delete profiles for new client companies, client users, or vendor users who have registered to their Appraisal Scope platform-version. The **Pending Users** tab will display the number of profiles that are awaiting approval, thereby notifying admin users of the potential users still in the **Pending** status.

PENDING USERS TAB FUNCTIONALITY

Admin users can use the search control panel on the left side of the **Pending Users** page to find specific users that are in a **Pending** status. When **Client** is selected at the top of the search control panel, the search panel will be configured to search the list of pending client companies or client users. When **Appraiser** is selected at the top of the search control panel, the search panel will be configured to search the list of pending vendor users.

Admin users can narrow the list of pending client companies or client users by clicking the **Account Type** or **State** drop-down menus and choosing from the options. Admin users can also find a specific entry for a pending client by typing in the Company Name or Email text boxes.

To narrow the list of pending vendor users, admin users can click in the **License Type** and **State** drop-down lists and choose to search that way. There is also the **DNU List** drop-down box where an admin user can click **Yes** or **No** to filter the pending **Vendor User** list to show only pending vendor users who are or are not on **Do Not Use** lists. Specific pending vendor users can be found by name, license number, email address, company name, city, or phone number.

The search results for pending client companies or client users will appear in a list on the right side of the page, under the **Pending Clients** header. The search results for pending vendor users will appear in a list on the right side of the page under the **Pending Appraisers** header. The **Pending Clients** and **Pending Appraisers** tabs will allow an admin user to toggle back and forth between the **Pending Clients** and **Pending Appraisers** lists.

Staff users can find information about approving new client companies and new client users in Chapter 2 of this User Guide. To register a pending vendor user, an admin user will click **Approve** from the **Action** column of the relevant entry under the **Pending Appraisers** header.

Once a vendor user has been approved, admin users have a variety of options to manage these users. The [Appraiser tab](#) section of this User Guide provides conceptual information on the vendor user profile and procedures on the ways that vendor user profiles can be managed.

License Tracking tab

In contrast to the **ASC** tab, which provides the ASC database of licensed appraisers, the **License Tracking** tab provides access to a database of all appraisal licenses issued nationwide. As an example of how the License Tracking database is different from the ASC database, one can imagine an appraiser who is listed on the ASC and who carries appraisal licenses in three states. This appraiser will be associated with one entry on the ASC database as a licensed appraiser, but the same appraiser will be associated with three entries coinciding with the three licenses on the License Tracking database. Admin users have several options for searching the License Tracking database by using the **Search Licenses Tracking** control panel at the top of the page.

Admin users can view the status of a specific appraiser's licenses by entering that appraiser's first and last name, or they can view the status of a specific license by entering the license number. They can also view the licenses that have been issued in a particular state.

For any list of appraisal licenses appearing at the bottom of the page, admin users can also refine the list by searching for specific status parameters that might be affiliated with an appraiser or appraisal license, such as disciplinary action and the date range of the action. It's also possible for admin users to select whether to search by the statuses **Inactive** or **Active** for both old and new licenses, and to provide an expiration date range as parameters in the search of both old and new licenses. And after a list of search results has been obtained, admin users can click **Export** to download an Excel file of the list.

CHAPTER 6. APPRAISALS: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Appraisals tab

The **Appraisals** page is accessible from the main tab menu at the top of the landing page. Users are able to search for, access, edit details, and perform tasks related to the orders that an AMC is managing from the **Appraisals** page.

Order details and available platform functionality related to orders are housed in order records. These records are organized by status, and they're accessible from the menu of tabs found in the upper-left corner of the **Appraisals** page. Information on accessing order records and how orders are managed through these profiles is covered in the sections that follow.

Note: The **Appraisals** page gives access to order records for all orders that an AMC has ever managed from their platform-version. Staff users managing active orders may find it more within the flow of their responsibilities to access order records from the Dashboard Order Queues.

Appraisals tab controls

Search functionality and order record access

Admin users can access order records by using the **Search** panel on the left side of each page. If an AMC staff user clicks **Search** beneath the panel without entering information into any of the search fields, a list containing all order records available from that tab will appear. The length of the list returned can be controlled by entering information into individual search fields. Clicking **Clear** will clear all fields in the **Search** panel and return them to their default settings.

Note: **Super Search** functionality is also available to locate orders, but this functionality is accessible from its own tab, and a description of the features that it makes available will be covered in a separate **Super Search** section.

Staff users can also click **Advanced Search** in the **Search** panels associated with the first five tabs in the tab menu. This action will make options available for searching by a specific order date or appraiser, or by client company, workflow status, or state.

Each entry in a list of search results represents an order record. Clicking on an individual entry will open that order record on the right side of the page.

Appraisals subtab menu

All, Pending, Completed, Cancelled, and On Hold

Every order record in an AMC's Appraisal Scope platform-version, with the exception of those accessible under the **AVM** and **RCR** tabs, will be accessible from the **All** tab. If a user is unclear as to which status an order is in at a given time, they can use the **Search** panel under the **All** tab to find the record they're looking for. The number that appears in this tab reflects all order records available on an AMC's platform-version, excluding those associated with **AVM** and **RCR** orders.

The **Pending**, **Completed**, **Cancelled**, and **On Hold** tabs divide these order records up by order status. The list of order records accessible from any of these tabs will be limited to records that reflect the given status. A user can use the **Search** panel under any of these tabs to further refine the list of order records available.

Super Search

The **Super Search** tab can be used to apply a variety of search criteria to produce lists of order records. In addition to the expanded number of fields available for search by individual order details in relation to the **Search** panels from other tabs, there are also drop-downs and text boxes that can be used in combination to return lists meeting a variety of needs. A list will be returned at the bottom of the **Super Search** page by clicking **Search**, and all fields can be cleared by clicking **Clear**.

This **Super Search** functionality essentially provides staff users the ability to run a report on the fly. Each entry in a list that's returned from a Super Search, as well as being clickable and providing access to an order record, provides several pertinent details related to an order. These order lists can be exported as an Excel table by clicking **Export**, just above and to the right-hand side of the list. Certain **Super Search** fields can also be rendered inactive or be subsequently reactivated by clicking the **Configure** icon to the right of **Export** and dragging and dropping individual elements from the **Inactive** and **Active** columns of the **Configure Super Search Fields** dialog box.

AVM

The **AVM** tab gives staff users access to automated valuation model (AVM) orders. A user will use the **Search** pane under this tab to return a list of AVM order records.

RCR

The **RCR** tab gives staff users access to RealCondition Report (RCR) orders. A user will use the **Search** pane under this tab to return a list of RCR order records.

Order record overview

An order record is established when an order is placed. Order records contain all of the pertinent details for any order that Appraisal Scope handles for an AMC. These details go beyond just the geographical and ordering-party information to include a history of the actions taken toward managing the order over its lifetime, from assignment to completion.

These records also provide the controls that allow AMC staff users to manage orders from the time they are initiated until they are fulfilled. Each order record offers a main tab menu and a secondary submenu that gives a staff user access to options for obtaining detailed information or performing essential tasks related to orders. Each option available from an order record is described in detail in the **Order Record Controls** section.


Order record controls


Main tab menu

Order Details



When a staff user clicks on an entry for an order, whether from a Dashboard **View** or **Order** list under the **Appraisals** tab, the profile will open onto the **Order Details** page by default. The page is divided into three sections—**General Information**, **Property Information**, and **Inspection Contacts and Access Information**—that provide information related to many aspects of an order.



General Information section of Order Profile page

General Information 

Client: Five Oaks Credit Union 1771 Terrace Blvd. Stanley, NE, 65432	Ordered For: John Spencer (Processor) Branch: Southeast Email: John@focu.com Phone: 585-696-3366
Client displayed on report: Five Oaks Credit Union 1771 Terrace Blvd. Stanley, NE, 65432	Submitted By: Jane Smith (Admin) Email: jsmith@email.com
Job Type: Standard 1004	Order Date: 10/26/1985 01:21:00 am
Loan Type: Conventional	Due Date: N/A Edit
Intended Use: Purchase	Appraiser Due Date: N/A Edit
Client Fee: \$0.00 edit	Assigned Date: N/A
Amount Due: \$0.00	Accepted Date: N/A
Appraiser Fee: \$0.00	Inspection Date: N/A
Reviewer Fee: \$0.00 edit	Estimated Completion Date: N/A
Supervisory Fee: \$0.00 edit	
Admin Fee: \$0.00 edit	
Paid Status: Unpaid	
Paid Date: N/A	
Process Status: New	
Payment History: View Transaction History	
Appraiser Payment History: View Transaction History	
Appraiser Paid Status: Unpaid	
Last Update:	Estimated Closing Date: N/A
Staff User: N/A 	Loan Amount: \$250,000.00
Reviewer: N/A	Statistics: 
Client Salesperson(s): N/A	References: edit
DU Case File ID: N/A edit	
Loan#: 123456	
File#: 103A	
FHA: N/A	
Property Characteristics:	
Lien Position: N/A	
Purchase Price: \$250,000.00	


Property Information section of Order Profile page

Property Information  

Address 1: 1640 Riverside Drive 	Address 2: N/A
City: Hill Valley	State: CA
Zip Code: 91114	County: Los angeles
Property Types: Single Family	Legal: N/A
RUCC 2013: 1 	

Inspection Contacts and Access Information section of Order Profile page

Inspection Contacts and Access Information

Occupancy: N/A	
Best Person to Contact: Owner	
Borrower: Emmett Brown	Phone#: N/A
Work#: N/A	Cell#: N/A
Email: N/A	Borrower Intent to Proceed: N/A
	Date:
Show Additional Comments to Vendor?: No edit	
Additional Comments: N/A edit	
Instructions: View Instructions	
Staff Notes:  N/A	

Aside from the presence of facts related to the order, the **Order Details** page also offers staff users clickable links and icons that provide further details or refinement options across several categories of information. The links and icons that provide refinement options are discussed further in the Clickable controls section.

CLICKABLE CONTROLS

Edit

Among the clickable links available throughout the **Order Details** page, **edit** or **Edit** appears in several instances. A staff user clicking these links will be directed to controls allowing them to make a change to the value that appears next to it on the **Order Details** page.

General Information section links

Paid Status

A link will appear next to the **Paid Status** field that will read as the payment status that an order carries at the time. For any order not showing a status **Paid**, clicking on this link opens the **Secure Online Appraisal Payment** panel, which displays information about the payment that's due and payment options.

For orders showing a status of **Paid**, there are two icons that will potentially appear. The **Pencil and Notepad** icon will appear in all cases, and when clicked, this icon gives staff users the option to rebill the client company. The **Clipboard** icon will appear along with the **Pencil and Notepad** icon in cases where payment was made by credit card. When clicked, the **Clipboard** icon will open the **Billing Information** dialog box, which will display transaction information for that order.

Payment History

When a user clicks **View Transaction History** in the **Payment History** field, the **Transaction History** dialog box opens. In a case where an order displays a status of **Paid**, the user will see an entry for each transaction that's been carried out for an order. Among the transaction details that are visible in each entry are the date and time of transaction and the transaction type.

Users can also input information for manual transactions, initiate refunds, and send receipts from the **Transaction History** dialog box by clicking **Manual Entry**, **Refund**, or **Receipt**.

Appraiser Payment History

When a user clicks **View Transaction History** in the **Appraiser Payment History** field, the **Transaction History** dialog box opens. In a case where an appraiser has been paid via ACH, the user will see information for each payment made. Among the transaction details that are visible in each entry are the date and time of transaction and the transaction type.

Users can also input information for manual transactions, initiate refunds, and send receipts from the **Transaction History** dialog box by clicking **Manual Entry**, **Refund**, or **Receipt**.

Appraiser Paid Status

The **Appraiser Paid Status** field will display a link that reads as **Paid** or **Unpaid**, depending on the status. Clicking on these links will return the user to the top of the **Order Details** page to view the Appraisal Scope main tab menu. This emphasizes the fact that any adjustments to the **Appraiser Paid Status** must be made via the **Accounting** tab.

Process Status

A link will appear next to the **Process Status** field that will reflect the stage of the process workflow that an order is in at the time. Clicking on this link opens the **Change Status** drop-down, which a user can click to choose a different status to assign to the order.

Note: In a case where an order is in an **On Hold** status, clicking **View** will open the **Comment** dialog box, where a user can read the reason for an order being **On Hold**.

Staff User

A link will appear next to the **Staff User** field that will read either as the name of the AMC staff user who is assigned the order, or **N/A** in a case where a staff user hasn't been assigned to the order yet. In either case, clicking on the link opens a drop-down box that, when clicked, allows a user to choose from the list a staff user to manually assign to the order.

The **Clipboard** icon also appears next to the **Staff User** field. Clicking this icon opens the **Admin Rule Profile Assignment Logs** dialog box. This log tracks each instance of a change made to the staff user assigned to an order. The dialog box will show the date and time of a change, whether a change event was to assign or remove a staff user, the staff user removed or assigned, and either the Rule Profile under which a user was assigned or **Manual**, in the case of a manual assignment.

Reviewer

A link will appear next to the **Reviewer** field that will read either as the name of the Reviewer who is assigned the order, or **N/A** in a case where a Reviewer hasn't been assigned to the order yet. In either case, clicking on the link opens a drop-down box that, when clicked, allows a user to choose from the list a Reviewer to assign to the order.

Ordered For

The **Ordered For** field will reflect the client user for whom an order was placed. The link that appears next to the **Ordered For** field will read as the name of this user. Clicking on this link will open the **Client User Profile** page associated with the user.

Note: An email link will also appear in the **Ordered For** information. This link, when clicked, will take a staff user to an open email message dialog box where the **To** line will be prefilled with the **Ordered For** client user's email address.

Submitted By

The **Submitted By** field will reflect the Appraisal Scope user that submitted an order. The link that appears next to the **Submitted By** field will read as the name of this user. Clicking on this link will open the **User Profile** page associated with the user.

Note: An email link will also appear in the **Submitted By** information. This link, when clicked, will take a staff user to an open email message dialog box where the **To** line will be prefilled with the **Submitted By** user's email address.

Unaccepted Reminder

The **Unaccepted Reminder** field will only be visible on the **Order Details** page if it has been enabled at the global level from **Settings > Reminders > Unaccepted Reminder**. When the **Unaccepted Reminder** setting is activated, a link will appear next to the **Unaccepted Reminder** field that will reflect the time increment that an AMC has established in their global-level settings. When a staff user clicks on the link, a text box will drop down, allowing the user to change the time increment for the specific order associated with the order record.

Statistics

When a staff user clicks on the **Scorecard** icon, which appears next to the **Statistics** field, the **Scorecard** dialog box opens. This dialog box will display a range of metrics that provide a high-level view of the appraiser's previous work with the platform.

Assigned To

A link will appear next to the **Assigned To** field that will read as the name of the appraiser who is assigned the order. When a staff user clicks the link, the appraiser's vendor user profile will open.

There is also an **Identification Card** icon visible to the right of the appraiser's name. When a staff user points at the card, a dialog box containing the appraiser's contact details and Vendor Status will open.

Property Information section icons

Along with the locational details specific to a property, the **Property Information** section also offers some control functionality through clickable icons. The **View Map** and **Google** icons appear next to the **Property Information** header on the **Order Details** page.

Clicking the **View Map** icon opens a map viewer that displays a pin where the subject property is located. The map viewer offers options to interface with the map to view the property location in multiple ways.

Clicking the **Google** icon opens **Google Maps**. A pin will be visible where the subject property is located.

Other icons in Property Information section

An **Alert** icon will appear next to the property address detailed in the **Address 1** field. Clicking this icon will validate the address.

The **RUCC 2013** field refers to Rural-Urban Continuum Codes. This field will only be visible if it has been enabled at the global level from **Settings > Options > Order Details > Display Rural-Urban Continuum Codes (RUCC) on orders**. If this field is enabled, a tooltip will appear to the right of the continuum code. When a user moves their cursor over the tooltip, a box that details what the continuum code means and that shows population statistics will appear.

Inspection Contacts and Access Information section links

Instructions

The **View Instructions** and **Resend Instructions** links appear next to the **Instructions** field. When a staff user clicks **View Instructions**, the **Instructions** dialog box will open. The staff user can view from this box the instruction set that has gone out to the appraiser, as well as any instruction documents that have been attached. The user will also be able to print the instruction set by clicking **Print** in the upper right-hand corner of the dialog box.

A staff user can also direct Appraisal Scope to resend the instructions to the assigned appraiser by clicking **Resend Instructions**.

Staff Notes

The **Staff Notes** field is only visible to AMC staff users and not to **Client** or vendor users. This field provides a good place for staff users to convey internal notes that can be referenced at any time.

A **Pencil and Notepad** icon appears next to the **Staff Notes** field. When a staff user clicks this icon, a text box opens, allowing the user to type notes pertaining to the order. The user will click **Save** to make these notes visible in the order record. Notes that have been composed and saved will stay with the order record and will be visible beneath the **Staff Notes** field.

Note: This breakdown of the clickable controls available on the **Order Details** page reflects fields that are commonly visible to AMC staff users. **Other** fields with links to further functionality are available and can be made visible to staff users from the global level settings.

Updates

The **Updates** page allows an AMC staff user to make manual **updates** to the status of an order and/or provide notifications that will also appear as **updates** to admin users, client users, and/or vendor users, depending on the way that certain settings have been configured.

To manually change a status, a user will click the **Change Status** drop-down box and then click on the status that the order should reflect. Depending on the status change that's selected, an admin user can choose to have their platform-version **update** the client user and/or vendor user affiliated with the order by selecting the **Client** and/or **Appraiser** check boxes. These users will then see the **updated** status reflected in their respective Dashboard Order Queues accessible from their platform-interfaces, and they will receive an email notification.

Also depending on the status that an order is in, an admin user may find that they can edit aspects of the order that are associated with that status. For instance, if an order shows a status of **Inspection Scheduled**, an admin user can click **Edit** to the right of the **Change Status** drop-down box and change the dates and times of that inspection.

Note: When manually updating a status to **Inspection Scheduled**, the **Inspection Date** and **Completion Date** fields will both need to be filled out. The **Completion Date** in this scenario will be the estimated date of completion. If an **Inspection Scheduled** date needs to be edited to reflect a change of schedule, the **Completion Date** will also need to be edited.

ADDITIONAL NOTIFICATIONS

Admin users can provide notifications to **Client** and vendor users for any specific order from the **Updates** page. The user will click on the **Additional Notifications** drop-down box to see the notifications that are available to them. When the user clicks on a notification option, the pre-written text of that notification message will appear in the **Message** text box. An admin user can then change the text of the message in the text box if necessary, and when they are ready to post the notification, they will click **update**.

Assuming that the admin user has the **Last Update** column configured as active in their Dashboard views, the additional notification will be reflected—associated with the order to which the notification pertains—in the **Last Update** columns of the admin user's Dashboard Order Queues for **All Open** orders and for orders that match the status that the subject order is in at the time.

Admin users will also have the option of making these notifications visible to the client user associated with the order by leaving the **Notify Client** check box filled. This check box, located to the right of the **update** button, is selected by default, and so if a user is posting a notification that they don't want the client user to see, they will need to clear the check box.

The pre-written notification options that are available for an admin user to choose from the **Additional Notifications** drop-down list are created on the [Notification page](#) under the **Settings** tab. It's here that an AMC will choose whether or not the notification is to be visible to the appraiser.

Documents

AMCs will find the appraisal documents that vendor users upload to their platform-version under the **Documents** tab. This page provides functionality for staff users to upload new appraisal and additional documents, view and download the uploaded appraisal documents, and view and download the uploaded additional documents.

Users will find the **Appraisal Documents** header on the left side of the page and the **Additional Documents** header on the right. As documents are uploaded, they will be separated into lists under the header appropriate to the document type.

UPLOADING DOCUMENTS

To upload an appraisal document to the **Documents** page, AMC staff users will click **Upload Appraisal**, choose a file from their local directory, and click **Open**.

To upload an additional document, a user will click **Upload**, choose a file from their local directory, and click

Open. A dialog box will then open, and the user will click the **Document Type** drop-down box. A user will select a document type from the drop-down list, or they will select **Other**. If they select **Other**, they will type the document type in the **Input Label** text box. After the document type is established, they will click **Submit**.

Note: **PDF** and **XML** are the default file formats for appraisal documents, as is indicated in parentheses on the platform-interface under **Upload Appraisal**. However, if an AMC's platform-version is configured for other file types, an appraiser will be able to upload these other file types. For AMCs wishing to make other file types available for appraisal documents, contact the Appraisal Scope customer support team.

Drag-and-drop functionality

Appraisal Scope also offers drag-and-drop functionality for uploading additional documents. The drag-and-drop feature is used in the following way.

1. Go to the **Documents** page of an order record.
2. **Select** the files that you want to upload from your local directory, and drag them to the **Documents** page.
3. A light red box will appear.
4. Continue dragging the documents over to the box, and when the box changes to a darker shade of red, drop the documents.
5. When the **Please select the type of document you're uploading** dialog box opens, click the **Document Type** drop-down box associated with the first **File Name**.
6. **Select** the document type from the drop-down list, or select **Other**. If you select **Other**, add a document type in the **Input Label** text box.
7. Repeat this step for all files that you're uploading, and when you're finished, click **Submit**.

Note: Drag-and-drop functionality is only available for uploading additional documents. Appraisal documents must be uploaded by clicking **Upload Appraisal** under the **Appraisal Documents** header on the **Documents** page.

THE APPRAISAL DOCUMENTS LIST INTERFACE

The **Appraisal Documents** list displays all appraisal documents uploaded for an order. Each entry in the list will display fields that matchup with the **Date/time** column and the columns for **PDF** and **XML**. A user should note links that appear in the **PDF** and **XML** fields of a list entry, the text of which will appear as the file format (As noted previously, these files are generally **PDF** or **XML**, so the links will generally display as **PDF** or **XML**. See previous note, though, regarding the potential for column and file format exceptions). A staff user will click the **PDF** or **XML** link to view and/or download the file in that format.

A staff user will also note check boxes to the left of these file links. If the user wants to email an appraisal document to a client, appraiser, or other stakeholder, they should first select the check box associated with the file format they intend to email. They will then click **Mail**, under the **Additional Documents** header and just above the **Additional Documents** list. The user will then select the appropriate check boxes, and if they select **Other email**, they will enter an email address in the text box there, and they will then click **Send**.

Appraisal Documents list entries also give staff users visibility into whether the vendor user and client user associated with an order can view a document from their respective platform-interfaces. To view this information, a staff user will click the **Eye** icon from the last field to the right of the list entry. A staff user can control document visibility for these stakeholders by making sure that the **Appraiser** and **Client** check boxes are either filled in or cleared—filled in ensuring document visibility, and cleared ensuring no visibility.

To delete a list entry, a staff user will click the **Delete** icon.

Submitting a document through UCDP

A staff user can submit appraisal documents in the **Appraisal Documents** list to Freddie Mac and Fannie Mae by clicking **Submit** in the UCDP field associated with a document entry. The document type to be submitted will then be displayed beneath the list, and a user will click **Submit to UCDP** to finish the process.

When an order is submitted to UCDP, a corresponding **UCDP Order Details** panel will be created. This panel will appear below the **Appraisal Documents** list. Users can find the submission status for a UCDP submission in this panel, and for successfully submitted reports, they will also find clickable links to the PDFs.

Note: The above instructions assume an order record scenario where the profile of the client company associated with the order meets the following two conditions: the client company profile contains valid UCDP details, and its Company settings have not been configured for [automated UCDP submission](#).

Submitting a document through EAD

A staff user can submit appraisal documents in the **Appraisal Documents** list to FHA by clicking **Submit** in the EAD field associated with a document entry. The document type to be submitted will then be displayed beneath the list, and a user will click **Submit to EAD** to finish the process.

When an order is submitted to EAD, a corresponding **EAD Order Details** panel will be created. This panel will appear below the **Appraisal Documents** list. Users can find the submission status for an EAD submission in this panel, and for successfully submitted reports, they will also find clickable links to the **PDFs**.

Note: The above instructions assume an order record scenario where the profile of the client company associated with the order meets the following two conditions: the client company profile contains valid EAD details and its Company settings have not been configured for [automated EAD submission](#).

THE ADDITIONAL DOCUMENTS LIST INTERFACE

The **Additional Documents** list displays all additional documents that have been uploaded for an order. These documents can range from documents uploaded by Client and vendor users, to SSRs from the GSEs. Additional documents created or uploaded by AMC staff users will also appear in this list.

Each entry in the **Additional Documents** list will have links in the **Doc Type** and **File** columns. To change the **Doc Type** name associated with an entry, a user will first click the link. They will then click the select document type drop-down box that appears, choose a name from the list, and click **Save**.

To view or download a document in the **Additional Documents** list, a staff user will click the **File** name link. To see whether the vendor user and/or client user associated with an order can view a document from their respective platform-interfaces, a staff user will click the **Eye** icon from the last column of the list entry. A staff user can control document visibility for these stakeholders by making sure that the **Appraiser** and **Client** check boxes are either filled in or cleared—filled in ensuring document visibility, and cleared ensuring no visibility.

To delete a list entry, a staff user will click the **Delete** icon.

CREATING AN INVOICE

A staff user can at any time create an invoice that will generate as a pdf to be submitted to the client company. Among the data points that this invoice will pull from when generated, the Appraisal **Invoice Description** is a pre-written message that will appear in the **Invoice Description** section at the bottom of the pdf. An AMC staff user can compose or edit this pre-written message by going to **Settings > Options > Documents > Default invoice description**. The text of the Appraisal invoice Description can be changed from the pre-written message at the time the invoice is created and added to the **Additional Documents** list.

To manually create an invoice, a user will first click **Create Invoice**. The **Add Description** dialog box will open, displaying the pre-written Appraisal **Invoice Description**. The text of the description can be changed in the text box. Whether a user changes the text or leaves it as written, the user will click **Generate Invoice** to add the document to the **Additional Documents** list.

CREATING AN ADDITIONAL DOCUMENT

A staff user can use pre-drafted templates to create documents that will be kept in the **Additional Documents** list. The user will first click **Create Doc**. The **Notification** dialog box will open, displaying the list of templates available to create documents from. The user will select the check boxes associated with each document template they want to create documents from and then click **Submit**. Each template will create a separate document in the **Additional Documents** list.

The options in the **Notification** dialog box will be a mix of system templates that Appraisal Scope makes available, along with the templates that an AMC produces for the purpose of creating additional documents. AMC staff users can view the text of the pre-drafted templates available in the **Notification** dialog box by going to **Settings > Document Upload > Templates** list, the list just above **System Templates** on the **Document Upload** page.

EMAILING ADDITIONAL DOCUMENTS

A staff user can email documents to clients, appraisers, and other stakeholders using the **Mail** functionality associated with the **Additional Documents** list. The user will first click **Mail**. This will reveal options for **Client**, **Appraiser**, and **Other email**. The user will select the check boxes associated with the stakeholder(s) they want to send documents to. If **Other email** is chosen, they will need to input an email address in the textbox to the right of this option.

The controls beneath these options are used to choose the documents that will be emailed from the **Additional Documents** list. Users can choose individual documents by clicking the check box in the first column of any entry in the list. Users can also click **Check All** or **Uncheck All** to make mass choices of list entries. When a user finishes their selections, they will click **Send** to email chosen documents.

Email Office

The **Email Office** page of an order record is a central location for direct email communication among stakeholders for an order. Admin users can send messages from this page, and they can view these messages along with all other messages that have been sent by any of the stakeholders associated with an order from this page.

A record of each email is visible from the **Email Office** page as a separate entry in the **Email Log**. More than simply a static record of email communications for an order, the **Email Log** can be thought of as an ongoing thread of communication that is accessible throughout an order life cycle, and beyond. The log gives staff users the tools to facilitate effective communication among multiple stakeholders, and it gives relevant stakeholders visibility into ongoing communication.

Email Log entries, the data they contain, and their functionality are covered in more detail in the following sections.

THE EMAIL LOG AND EMAIL FUNCTIONALITY

The **Email Log** allows staff users to stay on top of their ongoing email communication requirements for the orders they manage, and it provides a record of communications for each order managed within an AMC's Appraisal Scope platform-version. The log will show email communication from clients and/or appraisers to the AMC, communication from the AMC to clients and/or appraisers, and communication between AMC staff users regarding an order.

Each log entry is contained separately within an Email panel. For incoming messages from outside stakeholders and AMC staff users, these panels will display who the message is from and the time that the

message was received. For outgoing messages and messages between staff users, the panel will display the staff member who sent it and the message recipient(s). In a case where a message was logged from the [Messages tab](#) of the Dashboard, the Email panel will display a record of who logged it and the time it was logged. More information on Email panels is provided in the following section.

Email panels

Along with names of email senders and recipients, and the roles that these stakeholders play for a given order, each Email panel will also display links that can be clicked to access further information or configurations.

Clicking a link that appears beside the name of a message recipient will open the **Notifications** dialog box. Here, staff users can see all email recipients, the email addresses associated with the recipients' Appraisal Scope profiles, what role they play within the order, for example Appraiser or Client, and whether the email was successfully delivered to a recipient's address or was rejected.

Note: A staff user can also send a direct email from the **Notifications** dialog box by clicking the email address of the email recipient.

There are also links visible in the top right section of the Email panel. When a user clicks **View**, the Email panel will show whether the appraiser and/or client for an order can see the contents of an email message in the **Email Office** tab of their platform-interface. A staff user can change who sees a message by selecting or clearing the **Appraiser** or **Client** check boxes and clicking **Close**.

Email panels: conditional links

Mark as Read—read acknowledgments

An AMC staff user can use read acknowledgments in a couple of different ways from the **Email Office** page. Before detailing these alternatives, we will describe the conditions that dictate when read acknowledgments are applicable and how these conditions relate to the **Messages** queue of a staff user's dashboard.

A staff user will be able to see **Mark as Read** in the top right side of certain Email panels in the **Email Log** for an order, next to **View**. The **Mark as Read** option will be visible to this staff user in Email panels that contain messages originating from an action taken by a client user, vendor user, or different staff user, as long as the message is still visible in this staff user's dashboard, **Messages** queue.

The **Messages** queue and **Email Office Email Log** have a reciprocal relationship when it comes to read acknowledgments. If the staff user has taken an action on a message from their **Messages** queue, for instance they logged or forwarded the message, then the Email panel containing that message will not display **Mark as Read** in the **Email Log**. On the other hand, if the Email panel displays **Mark as Read** and the staff user clicks this option to carry out a read acknowledgment, the message will be cleared from the **Messages** queue on the dashboard.

This leads us to our two alternatives. The procedures are virtually the same for each alternative, with only one slight alteration. To mark a message as **Read** from the **Email Office** page, a staff user will first click **Mark as Read**. This will open the **Mark as Read** dialog box, giving the user the two choices that produce our two alternatives. If the user selects **For Me Only** and then clicks **Mark as Read**, the following happens:

- The message will be cleared from their **Messages** queue and an **Info** icon will appear.
- The **Info** icon will denote a date and time stamp specific to the read acknowledgment, and the staff user can view this time stamp later from the **Email Log** by pointing their mouse over the **Info** icon.
- **Mark as Read** will change to **Mark as Unread**, giving the user an option to reverse this procedure and its impacts by clicking.

If the staff user selects **For Everyone** in the **Mark as Read** dialog box and then clicks **Mark as Read**, Appraisal Scope will be impacted in the same general ways, but the message will be cleared from the **Messages** queue of all staff users that have visibility into the same orders, and those staff users will also be able to see the date and time stamp on that Email panel from their **Email Office** page.

Note: If a staff user doesn't need to make a different selection in the **Mark as Read** dialog box each time, they can select the Remember my choice check box to cut this step out of the process.

SENDING EMAILS FROM EMAIL OFFICE PAGE

1. To send emails from the **Email Office** page, click **Send** a message, to the right of the page and just under the **Order Record** submenu.
2. Several check boxes associated with the order stakeholders will appear. First, choose your intended message recipients from among these options.
3. If you select **To Client**, you will also be able to add in the **Notify Other** text box an email address of another stakeholder that you want to receive the communication.
4. If you select **To Appraiser(s)**, the appraiser(s) configured to receive the email will appear to the right of the check box as a link. Clicking a link will take you to the vendor user profile associated with an appraiser.
5. If you select **To Admin(s)**, **To Reviewer(s)**, and/or **To Salespersons(s)**, you will then click the drop-down list associated with your selection(s) and choose email recipients from the options available.
6. If you want to attach appraisal and/or additional documents that have already been uploaded for an order, click **Attach existing documents**. **Select** the check boxes associated with the documents you want to attach.
7. If you want to upload an attachment from among your local files, click **Upload Attachment**.
8. To compose the email message, you have the option of first choosing from among the [predefined messages](#) that have been configured in your platform-version. You'll click the **Select Predefined Messages** drop-down list, select the messages that you want to build your email message with, and click **Insert Messages** to the right of the drop-down list.
9. If you need to compose a custom message or add to the text in a predefined message, you will click in the text box and type your message there.
10. Click **Save** to send the message.

Note: Assuming that an email recipient has been configured to receive and send email notifications via a native email client (for example, Outlook or Gmail), documents attached using the **Email Office** page will be available to them via the notification emails that they receive, as well as from the **Additional Documents** list on their platform-interface. Also, when a user sends an email with an attachment from their native email client, the email message will be visible in the **Email Log**, and the attachments will automatically be added to the **Additional Documents** list.

User Tip: In situations where it makes more sense to communicate a message with some commentary included or to respond more directly to a message when it's timely and when the text of the original message is helpful, there are also some communication options available from the Dashboard, **Messages** tab.

Notification Log

The **Notification Log** page of an order record provides a full history of an order at a glance. This log provides a view into all emails, status updates, revision requests, and order modifications for an order.

Staff users can filter the list of panels that appear on the **Notification Log** page by selecting options from the **Submitted By** and/or **Type** drop-down lists, which are located at the top of the page. Users can also filter by a keyword or sentence by typing in the textbox labeled **Text**.

MANUALLY CREATING A NOTIFICATION LOG ENTRY

1. To manually create a **Notification Log** entry from the **Notification Log** page, click **Manual Log Entry** at the top of the page, just beneath the **Order Record** submenu.

2. The **Manual Log Entry** dialog box will open, and your cursor will be positioned in the text box there.
3. If you want to choose from among the [predefined messages](#) in your platform-version, click the **Select Predefined Message(s)** drop-down box and select the check box associated with the message(s) that you want to use.
4. Click **Insert Messages**, and the text will appear in the text box.
5. If you want to create a new message to be logged as a notification on the **Notification Log** page, type your message into the text box.
6. If you need to make any adjustments to the language displayed in the main text box, whether it be predefined language or newly-created, click into the text box and type your new text or edit the existing text.
7. Click **Save** to log the message. The message will then appear in its own panel on the **Notification Log** page.

NOTIFICATION LOG PANELS

Each log entry is contained separately within a **Notification Log** panel. The panel will display the origin of a notification, for instance an admin user or **System** notification, in the top left corner, along with the date and time of the notification. The panel will also display in the top right corner any action that is associated with the notification, for instance whether the notification was sent out to a client or appraiser, or whether it was logged. If the action was automatically carried out and logged by Appraisal Scope, **System** will appear to let the user know that this is the case.

In cases where a user was sent a system generated notification, a link will appear that will reflect these specific action(s), for example **Notified Client**, **Notified Appraiser**, or **Both**. Clicking these links will open the **Notifications** dialog box. Here, staff users can see all notification recipients, the email addresses associated with the recipients' Appraisal Scope profiles, what role they play within the order, and whether the email was successfully delivered to a recipient's address or whether it was rejected.

Notification Log row highlighting

When an Appraisal Scope platform-version has been configured for Notification Log row highlighting (to enable and configure within Appraisal Scope, go to **Settings > Options > Order Details > Notification Log** row highlighting), a staff user can use highlighting colors to draw attention to the subject matter of a notification. The highlights can be configured to represent a notification purpose, such as a status notification, or a particular type of information conveyed, like an invoice amount or appraiser modification.

To use the Notification Log row highlighting, a user will click the Paint Brush icon in the top right corner of a Notification Log panel. In the **Select Row Highlighting** dialog box, the user will click **Select** next to the highlighting option that they want to use and then click **Close**. The notification message will be highlighted, making that row within the log immediately visible to staff users.

Forwarding a notification via Email Office

To forward a notification through the **Email Office** page, a user will click the **Envelope** icon in the top-right corner of the **Notification Log** panel for the notification they want to send. They will be directed to the **Email Office** page, where they can select among options to determine recipients and other attached materials to forward along with the notification. Procedures for forwarding a notification will mirror those found in the [Sending emails from Email Office page](#) section, beginning with Step 2.

QC Review–Order Record menu

The **QC Review** page of an order record is where AMC staff users and Reviewers can access the QC Review tools available to assist in reviewing appraisal documents submitted for an order and requesting revisions. The page is broken into three sections, each containing a list of checklists or other tools available to the user. The possible checklists and tools fall into the categories of **Manual**, **Automatic**, or **Third Party AVM and Review Products**.

USING MANUAL CHECKLISTS

An AMC staff user or Reviewer can access a manual checklist to assist with a review by first clicking on the **Pencil and Notepad** icon in the **Action** field of an entry in the **Manual** list. When the **Select Appraisal Document XML** dialog box opens, the user will need to click the drop-down box, select the document that they want to review, and then click **Submit**.

The checklist will open, and any fields in the checklist that are pulling information from the XML file of the appraisal document that was selected will be populated. The user can then proceed to review the PDF file of the document, using the checklist for assistance.

USING AUTOMATED CHECKLISTS

An AMC staff user or Reviewer can run an automated checklist that has been created on their AMC platform-version for the Traditional 1004 and 1073 appraisal documents submitted for an order. In the **Automated** section, the user will click the **Clipboard** icon in the **Action** field associated with the appraisal document. This will run the document against the set of rules that constitute the automated checklist. A **Reviewer Report** page will open for that appraisal document, giving the AMC user a snapshot view showing where a document is deficient.

For more information about Appraisal Automated **Checklists**, how they're created, and how they can be used, see the [Appraisal Automated Checklists](#) section of this User Guide.

THIRD PARTY AVM AND REVIEW PRODUCTS SECTION

An AMC staff user or Reviewer will find the third-party products that are available on their AMC's platform-version in the **Third Party AVM and Review Products** section. The third-party review products go beyond the functionality available through the Appraisal Scope automated checklists, offering expanded rule sets and other features that make the review process more efficient. For more information about these products, contact Appraisal Scope support.

Request Revisions

The **Request Revisions** page of an order record provides AMC Reviewers and staff users a log of revision activity and a place to request a revision or reconsideration of value. The log contains individual records of revision activity, with information pertaining to each record viewable and accessible from a Revision Log panel.

Revision Log panels will display information related to the revision activities that they record. Information about when a revision was requested, who initiated it, and the appraiser who ultimately received the revision request will be displayed in the Revision Log panel.

SUBMITTING A RECONSIDERATION OF VALUE REQUEST

An AMC User can submit a Reconsideration of Value request from the **Request Revisions** page by clicking **Reconsideration request**. The user can provide comp details in the text boxes and comments related to these comparisons in the **Comments** section of the **Reconsideration request dialog** box.

The user will also have the option to attach a document to the request. If the user wants the client to be notified by email when a request is submitted, they can select the **Notify Client** check box at the top of the dialog box. When the user clicks **Submit**, the appraiser will receive the request.

SUBMITTING A REVISION REQUEST

An AMC User can submit a request for a revision from the **Request Revisions** page by clicking **Send a revision**. This will open the **Revisions/Stipulations** panel.

To initiate a request, the user will first click the **Revision Type** drop-down box to choose whether the revision request originates with an Underwriter or the AMC Reviewer. The user can then begin inserting the text of the revision request message into the text box by clicking on the **Predefined Messages** drop-down box.

Note: The user can also submit a Reconsideration of Value request using the **Revisions/Stipulations** panel by choosing **Reconsideration Custom** from the **Revision Type** drop-down list and clicking **Select File** to attach the appropriate documentation.

Clicking the **Predefined Messages** drop-down box will open the list of [predefined messages](#) for revisions that have been created on the AMC's platform-version. To insert a relevant predefined message into the text box, the user will select the check box associated with the message and click **Insert Predefined Message(s)**.

The user will then click the **Select Revision Code(s)** drop-down box and select a relevant revision code, if available (Revision codes can be configured by going to **Settings > Options > Revisions**, finding **Revision Codes**, and clicking **Configure**). After this, the user can attach any document from the [Additional Documents list](#) by clicking **Attach existing documents** and selecting the check boxes associated with the relevant documents. And then the user can click **Select File** to upload any other documents that they want to accompany the revision request.

If the user intends the text in the text box to be a checklist for the appraiser, they should make sure the **Checklist** check box, located beneath the text box and to the right of **Cancel**, is selected. This will ensure that check boxes are included for the appraiser to check off revisions as they are completed. The user can preview the checklist by clicking **Preview**. If the text is not intended as a checklist, the user should make sure the **Checklist** check box is clear.

And finally, if the user doesn't want the client to be notified when a revision request is sent, they will need to clear the **Notify Client** check box. When the user is satisfied with the revision request, they will click **Save** to send the request to the appraiser.

Subtab menu

Complete

The **Complete** tab allows AMC staff users to designate which documents will accompany the **Completed Order** email notification sent out to client companies, and to add situational text to accompany the notification when it's sent out. Users can also choose whether the borrower will be sent a copy of the report or other documents.

The **Complete and Submit Assignment** dialog box will open when a user clicks the **Complete** tab. Users can select the check boxes associated with any documents that they want to be sent out with the **Completed Order** email from here. To have a report emailed to the borrower, the user will enter the borrower's email address in the **Email appraiser to borrower** text box, and then select the check box just to its right. **Selecting** this check box will also make other documents available to choose to send to the borrower.

Note: The **Complete** tab will only be visible to staff users who have been set up with this permission. Permission for the **Complete** tab is controlled from the **Staff Permissions** dialog box, accessible from the main landing page by going to **Staff > Staff > Permissions**. To give a staff user access to the **Complete** tab, the **Lock Complete Order Option** check box should be empty.

Re-send

When an order has been completed, the **Completed** tab on the menu will be replaced by the **Re-send** tab. This tab allows AMC staff users to re-send the link for the appraisal report and other documents to the client and/or borrower.

RESENDING AN APPRAISAL REPORT LINK TO A BORROWER

The link that is emailed to the borrower will provide them with access to the appraisal report for 30 days. After that, the link will no longer work. In a case where a link has expired before the borrower has accessed the

report, the staff user can click **Re-send**; clear the check boxes associated with **Client** in the dialog box, so that the only check box still selected will be associated with the appraisal form under the **Borrower** column; and click **Send**. The borrower will be emailed a new link to the appraisal form.

Clone

When a user needs to place an order, they can clone a different order with similar characteristics to save time. When a user clicks the **Clone** tab from an order record, a **Clone Form** will open, and the form will show many of its fields pre-populated with information from the order record. The user will need to change the information where it's relevant to do so, making sure that at a minimum all of the fields accompanied by a red asterisk are filled in. After it's filled out, the user will click **Save** to place the order.

Priority (On/Off)

The **Priority** tab allows staff users to designate a particular order as Priority. When the tab is selected, an **Exclamation** icon appears as an order flag in the top-right corner of the order's details. This icon will also appear associated with the order entry on the Dashboard Order Queue, which gives staff users the further option of filtering their dashboard by priority orders.

Note: Appraisal Scope can also be configured to [apply the Priority Order Flag automatically](#) for orders placed by certain client companies or involving certain Clients on Report.

Special Care (On/Off)

The **Special Care** option allows a user to signal attributes of a particular order that warrant attention. These attributes are often related to an AMC's relationship with an ordering client. When a user clicks the **Special Care** tab in the order record, the **Appraisal Special Care** dialog box opens displaying a text box.

If the **Special Care** tab displays **Off** at the time it's clicked, the text box will ask for a user to provide a **Special Care Reason**. After a user has entered the reason to provide special care and clicked **Save**, the tab will display **On**, and a **Star** icon will accompany the order entry in the Dashboard Order Queue.

If the **Special Care** tab displays **On** at the time it's clicked, the text box will ask for a user to provide a Special Care Resolution. After a user has entered information in the box and clicked **Save**, the tab will display **Off** and the **Star** icon will disappear from the order entry in the Dashboard Order Queue.

Add Appraisal Form

An AMC user can request an additional appraisal form for an order by clicking **Add Appraisal Form**. A page opens that resembles an order form, with many of the fields pre-populated with information from the order record. A user will need to make sure that at a minimum the fields accompanied by an asterisk are completed and then click **Save**.

A new order will be created. The new order will be linked with the order from which it was created. A **Blue Plus** icon will appear next to the **Job Type** description on the **Order Details** page of the new order. When clicked, this icon will take the user to the order that the new order is linked with.

Print

The **Print** tab allows a user to print the **Order Details** page of an order record.

Edit

The **Edit** tab allows a user to make changes to the general information related to an order that appears under the **Order Details** tab of an order record.

Assign

An AMC user can manually assign orders to appraisers and view a record showing an order's assignment history by clicking the **Assign** tab. When a user clicks **Assign**, they will see the jobtypes that have already been assigned for an order record, who they've been assigned to, and when they were assigned.

A user will also have access to search functionality to find and assign appraisers appropriate to carry out an order. The top row of options in the **Search** panel allows users to narrow the field of appraisers available to search. When a user selects **Auto Assign**, a list of appraisers who would qualify for the order based on the ordering client company's auto-assign setting is returned.

When a user selects **Entire Panel** or **Directory**, the appraisers available to search will either, in the case of **Entire Panel**, be restricted to all appraisers that are vendor users on an AMC's platform-version, or there will be no restrictions if **Directory** is selected, allowing a user to search the entire Appraisal Scope directory of appraisers.

The **Approved List** selection works in conjunction with the **All Approved List** drop-down box. When a user selects **Approved List**, they can click **All Approved List** and a drop-down list of all [Vendor Panels](#) will appear. If a user selects one of the Vendor Panels, then the appraiser search will be restricted to appraisers in that Vendor Panel.

The **Search by Office Manager** selection allows a user to enter the name of a specific Office Manager as a search parameter. When this option is selected, the **Search Name** text box available as a search parameter switches to **Manager Name**.

After a user has restricted the pool of appraisers to search from by selecting one of this top row of options, they can further narrow the search parameters by using the text boxes, check boxes, and drop-down lists in the panel. When they've entered the appropriate parameters, they will click **Search** to generate a list of appraisers.

Note: Selecting the **Coverage** check box will limit the search results to appraisers who are licensed within the county of the subject property. Selecting the **Job type** check box will limit the search results to appraisers who will perform the jobtype ordered.

To assign an appraiser from the list of appraisers generated by the search, a user will select the check box associated with that appraiser under the **Assign** column of the list and then click **Assign** just above the list, to the left of **Request Bid**. If the user wants to request a bid from a particular appraiser, they will follow the same procedure but click **Request Bid**, rather than **Assign**.

Before a user assigns an order, they can select the **Notify Client** and/or **Appraiser (SMS)** check boxes. This would ensure that the client is notified via email and that the appraiser is notified via text message when an order is assigned, given that SMS has been enabled in Appraisal Scope for a particular appraiser.

A user can also view a map showing the location of a subject property by clicking on the **Map** icon, located above and to the right-hand side of the list of appraisers that's returned by the search. The configuration of the list of appraisers can also be altered by clicking the **Page and Gear** icon, just to the right of the **Map** icon.

CONFIGURING THE APPRAISER ASSIGNMENT LIST

A staff user can configure which fields are made active in the list of appraisers returned by a search by clicking the **Page and Gear** icon, just above and to the right-hand side of the appraiser list. The **Configure Assignment Fields** dialog box will open. A user can select a field category that's either **Active** or **Inactive** and drag it to the opposite column in order to populate the appraiser search list with the fields they want.

The list can also be configured to show if an appraiser has been assigned before, and when an appraiser was either last assigned or last accepted an order. The **Show Prior Appraisers** check box can be cleared if it's not

important to see whether an appraiser has been signed before. The staff user can then choose between the **Show last assigned** or **Show last accepted** options to see either when an appraiser was last assigned or last accepted an order, respectively.

Note: The view of this list is user-specific and so will vary from user to user. Each staff user can configure this list independently to suit their own user-specific needs.

Assign AMC

The **Assign AMC** tab will only be relevant for those AMCs using an AMC-to-AMC workflow. For those AMCs who are, this tab will allow a staff user to search and assign from among available AMCs.

Cancel Order

The **Cancel Order** tab allows a staff user to cancel an order and compose a cancellation message to send to the client and/or appraiser. To compose a cancellation message to send to the client and/or appraiser, the user will click **Cancel Order**, compose their message in the text editor inside the dialog box, make their **Notify client** and **Notify appraiser** check box selections, and then click **Submit**.

Note: The status of the order will be changed to Cancelled as soon as the cancellation message is submitted.

QB Sync

For those AMCs using the QuickBooks Desktop Integration, the **QB Sync** tab will be visible on the subtab menu. In a case where the AMC has disabled certain QuickBooks sync options in their platform-version, this tab is available for a staff user to select to manually submit an invoice and/or payment information to be synced with QuickBooks. The tab also serves as a status indicator for the QuickBooks manual sync process: if the tab is showing gray, it means that no action has been taken; if it's green, the record and invoice have been synced; if it's yellow, the sync has been initiated but is only partially complete.

CHAPTER 7. DASHBOARD: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Dashboard tab

When an AMC staff user logs in to Appraisal Scope, they access the platform beginning at the landing page. A prominent feature of the landing page is the main tab menu that runs across near the top, from left to right. Assuming a staff user has **Dashboard** tab permissions, the **Dashboard** tab is first on this menu, and when this user reaches the landing page, this tab will be selected by default.

The **All Open** subtab, under **Dashboard**, is the first in a series of subtabs that give users a list of order records that's based on the order status or type. **All Open** is selected by default, which reveals an **All Open** list of order entries, giving AMC staff users a view from their landing page into all of the orders that are in an Open status and that they are configured to see. In general, orders in an Open status will be those not yet completed and that haven't been cancelled.

Note: Keep in mind that the permissions given to a staff member will determine what orders a user sees from their landing page. **Staff** members working under a rule profile will see the open orders that fit the criteria established in that rule profile. And for admin users with the right permissions, choosing a staff member from the **Staff** drop-down list will provide a view into the open orders that the given staff member sees.

Dashboard subtab menu

The options in the **Dashboard** subtab menu can be thought of as filters that will restrict the number of records that are viewable to those that match the status reflected on the subtab. A staff user will click on a subtab from the menu, and depending on the permissions that are set up for the user, they will be able to view a list of orders that match the order status of the subtab. This list of orders is referred to as a queue. In general, as an order moves through an AMC's Appraisal Scope workflow, it will change queues so that the order queue in which it's found will always reflect the order's status within the workflow.

The number that an AMC staff user sees just above the text description of each subtab reflects the number of orders accessible from that subtab. For general reference, the number of active orders that an AMC is managing at any given time will be reflected in the **All Open** tab, given that the admin user viewing the platform-version has adequate permissions to be able to view all of the orders accessible there.

Each order has its own profile, or record of important information to help staff members stay on top of management tasks. Order records can be accessed from any queue when a user clicks on the **File#** or **Borrower Name** fields specific to an order. This action will take the user to the **Order Details** page of that order record.

Staff users can also access a **client** company profile by clicking the **Client** or **Client on Report** fields specific to a loan entry. vendor user profiles can be seen when an **Assigned To** field entry is clicked.

Note: It's important to note at this point that the views a staff user gets from the **Dashboard** page will be unique to that staff user. **Due** to the role of permissions and rule profiles, it's likely that a staff user will only be looking at a subset of the total number of orders that an AMC is managing. Dashboard views are also configurable by individual users, and so a staff user will also be viewing information types and using filtering tools that they have the ability to change (see the section, *Configuring available Dashboard Views*, for more information).

All Open

For a given staff user, the **All Open** subtab list consists of all orders that they are set up to see and that are in an Open status, not yet completed, and not cancelled.

New

The **New** subtab list typically consists of orders that have just come in. These orders will be in one of three statuses that are viewable from the **Status** column of the list. When the status shows **New**, the order hasn't been **assigned to** an appraiser. When the status shows **Accepted** with Condition, it means that it's been assigned but the vendor user has accepted it with a condition that needs to be fulfilled. When the status shows **Declined**, the vendor user has not accepted the assignment, and the order will need to be reassigned.

Note: For **New** orders in an **Accepted** with Condition or **Declined** status, a staff user can click the **Eye** icon to see the message detailing the appraiser's condition or reason for declining.

Accepted with Conditions

A vendor user has the ability to make their acceptance of an assignment contingent on certain conditions, such as fee or due date modifications. When this occurs, the status of the order will switch from **New** to **Accepted with Conditions**. Although the status changes in this case, the order record will remain in the **New** queue. Appraisal Scope will not move it to the **Accepted** queue until the AMC has accepted the stated conditions.

Staff users with access to the **Dashboard** tab can filter the **All Open** queue to isolate records in an **Accepted with Conditions** status by clicking the **Process Status** drop-down box, located above the queue, and selecting **Accepted with Conditions**. In order to accept the conditions that the appraiser has requested be met, however, a staff user will need to click the **New** subtab and access the order record in that queue.

ACTING ON AN ORDER IN AN ACCEPTED WITH CONDITIONS STATUS

Staff users have the following options with regard to orders in the **Accepted with Conditions** status:

1.) accepting the appraiser's conditions without conditions of their own; 2.) making their own acceptance contingent on the appraiser accepting counter-conditions; or 3.) declining the conditions and re-initiating the **Order Assignment** process.

To initiate action on an order in the **Accepted with Conditions** status, staff users can use the following instructions (also see Figure 7.1).

1. From the **Dashboard** page, click the **New** tab.

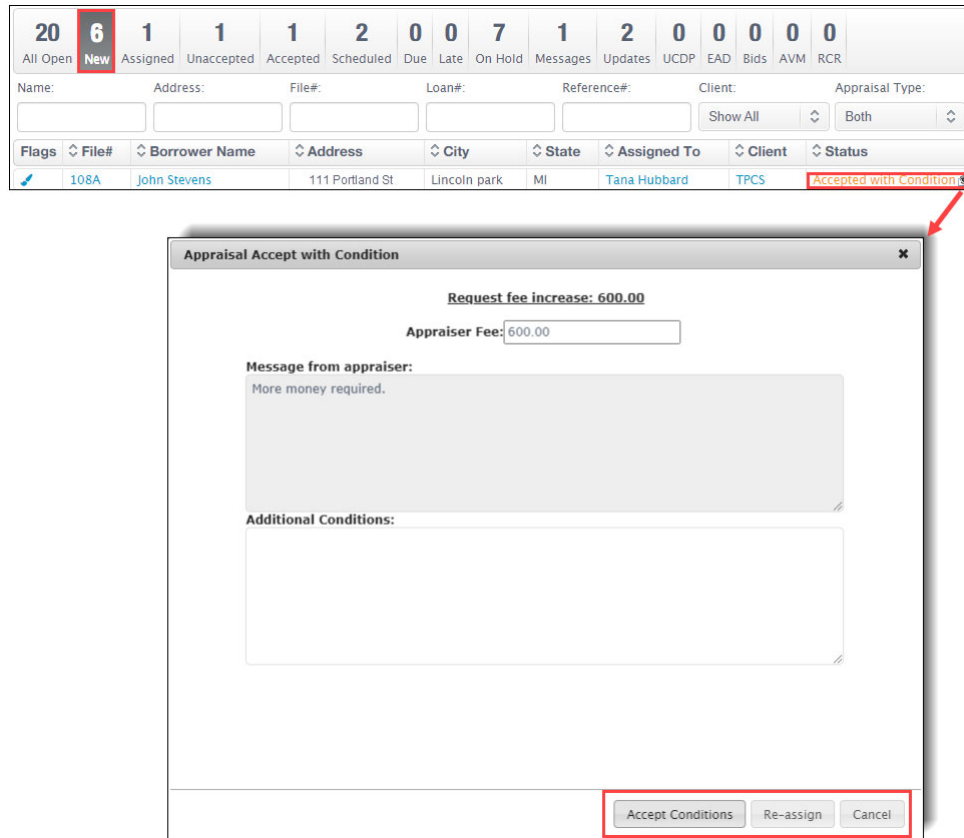
Note: Orders in the **Accepted with Conditions** status can also be acted on from the **All Open** and **Updates** queues; however, the **Status** column will need to be made active in the **All Open** queue before orders in the **Accepted with Conditions** status can be acted on there.

2. If the relevant order record isn't immediately identifiable, click the **Assigned Status** drop-down box and select **Accepted with Conditions**. This will isolate the relevant entries.
3. In the **Status** field associated with the relevant order entry, click the **Eye** icon.
4. The **Appraisal Accept with Condition** dialog box will open, revealing the nature of the request that acceptance of the assignment is contingent on.

To accept the conditions without any further negotiation, a user will click **Accept Conditions** in the dialog box. If, on the other hand, an appraiser has requested a fee adjustment, but the AMC staff user wants to counter with a different amount, the staff user can enter this amount in the **Appraiser Fee** text box. A staff user can also add other conditions that an order assignment will be contingent on in the **Additional**

Conditions text box. In either of these latter cases, the user will also go ahead and click Accept Conditions once they've made their changes.

Figure 7.1. Details of the **New** queue and **Appraisal Accept with Condition** dialog box, with the **Eye** icon and available action controls highlighted.



Once this action is taken, the order record will be returned to the appraiser with any counter-conditions placed on it, and it will also move into the **Assigned** queue. The appraiser will then have the option of accepting, declining, or countering with further conditions. If they accept, the order will move to the **Accepted** queue. If they choose one of their other options, the order will move back to the **New** queue and will show a status of **Accepted with Conditions** or **Declined**, depending on the choice made by the appraiser.

Choosing to reassign an order rather than accept appraiser conditions

If an AMC staff user wants to reject an appraiser's conditions outright, they will click Re-assign in the **Appraisal Accept with Condition** dialog box. This action opens the **Reassign Appraiser** dialog box. This dialog box will be pre-populated with a standardized message and the relevant order details. A staff user can customize this message to make it more relevant to the circumstances by clicking in the **Message** text box. If the staff user intends to notify the appraiser about order reassignment, they will click **Notify Appraiser**, and the text of the message will be sent.

When a user initiates a definitive action from the **Reassign Appraiser** dialog box, whether clicking **Notify Appraiser** or **Reassign without Notification**, the **Order Details** page associated with the relevant order record will open, and the **Order Assignment** controls will be accessible there at the top of the page, allowing them to assign a new appraiser.

Assigned

The **Assigned** subtab shows a list of orders that have been assigned but haven't yet been accepted.

Unaccepted

The **Unaccepted** subtab consists of a list of orders that have not been accepted after a preset amount of time has passed. This subtab gives a staff user a quick view into orders that may require their attention.

Accepted

The **Accepted** subtab list consists of orders that have been **assigned to** an appraiser and subsequently accepted.

staff users can enable their platform to send a reminder to an appraiser regarding the need to set an inspection date by activating the Inspection Reminder scheduler (click **Settings > Reminders > Inspection Reminder**, and click **Activate**). When this reminder is enabled, orders in the **Accepted** queue for which an inspection reminder has been sent to the appraiser will be highlighted yellow.

Scheduled

The **Scheduled** subtab list consists of orders for which the appraisal inspection has been scheduled. The **Inspection Date** column of the list reflects the date that the inspection is scheduled. The **E.C.D** (Estimated Completion Date) column will show the estimated date that a vendor user enters to communicate when they will have the completed appraisal report uploaded (in cases where a staff user hasn't configured their **Dashboard** view to eliminate this information).

Due

The **Due** subtab is intended to show a list of orders that have a firm due date showing when the AMC needs to have the report to the **client**. This date can be based off of the Appraiser **Due** Date, the **Client Due** Date, or the Estimated Completion Date. Once an order passes its due date, the order will move to the **Due** queue.

Late

The **Late** subtab is intended to show a list of orders that have passed their due date. This date will be calculated based on the global level settings available by clicking **Settings > Options > Schedule & Due** Date Limits.

On Hold

The **On Hold** subtab consists of a list of orders in an On Hold status. Orders can be placed On Hold automatically when settings have been configured at the global or client company level to establish the On Hold status criteria. A common example for orders in this list would be those placed On Hold due to lack of payment.

Messages

The **Messages** subtab opens the **Messages** queue, which gives staff users a quick look into communications that have been sent or received for the orders listed there. A message that appears in the queue will remain in the queue until an action is taken on it.

Users can view the text of a message and the date and time it was submitted by clicking the **Eye** icon in the **Status** field associated with an order. Users can also see how long a message has been in the queue by looking at the **Hours** field, where a running timer tracks this information.

To delete a message from the queue, a staff user will click the **Delete** icon in the **Action** field of the order entry. To delete multiple messages simultaneously, a user will select the check boxes associated with all order entries that they want to delete and then click the **Delete** icon in the **Action** field of any of these entries. The **Remove Message** Alert dialog box will open, asking the user to choose whether to delete only the message entry that they've clicked in or to delete all messages that have been chosen. The user will click All Selected **Messages**.

To take other action on a message, the user will click the **Checkmark** icon. Clicking the **Checkmark** icon will open the **Notification** dialog box. The dialog box displays whether the message is from a **client**, appraiser, or staff; it displays the **Message** text box with the text of the message itself; and it offers options for users to act on the message.

FORWARDING A MESSAGE FROM THE MESSAGES QUEUE

1. First, click the **Checkmark** icon in the **Action** field associated with the **Message** entry you want to act on.
2. When the **Notification** dialog box opens, select from the **Notify** choices, just above the **Message** text box, whether to forward the message to the **client**, the appraiser, to both client and appraiser, or to a member of staff.
3. If you choose **Staff**, click the **To staff** drop-down box and select the check box associated with the staff user(s) you want to forward the message to.
4. If you want to alter the message before you forward it, you can click into the **Message** text box and add or remove elements of the message there.
5. If you want to replace the message with [predefined messages](#), click the **Select Predefined Message(s)** drop-down box and select the check boxes for the messages that you want to appear.
6. When you're satisfied with your message, click **Submit**.

LOGGING A MESSAGE FROM THE MESSAGES QUEUE

1. First, click the **Checkmark** icon in the **Action** field associated with the **Message** entry you want to act on.
2. When the **Notification** dialog box opens, select **Log** from the **Notify** choices, just above the **Message** text box and then click **Submit**.
3. Messages logged in the system this way will be kept in the [Email Log](#), accessible from the **Email Office** tab of an order record.

Note: After a message has been acted on, it will disappear from the **Messages** queue. Users can prevent this by selecting the **Keep message in queue** check box in the **Notification** dialog box before submitting their action.

Updates

The **Updates** subtab consists of a list of orders indicating what and when the last changes were that occurred on the **Client** or vendor user sides, for instance any update in an order's status. The **Last Update Time** field of an order entry will indicate when the latest change was made, and the **Status** field will register the change that was made.

UCDP

The **UCDP** subtab consists of a list of orders submitted through the Uniform Collateral Data Portal. An admin user will be able to see the status of a UCDP submission by looking at the **Loan Status** field of an order entry. They will also be able to see the SSR certificates that have been received by looking at the **Fannie Mae** and **Freddie Mac** fields of an order entry.

EAD

The **EAD** subtab consists of a list of orders submitted through the Federal Housing Administration's Electronic Appraisal Delivery portal. An admin user will be able to see the status of an EAD submission by looking at the **Loan Status** field of an order entry.

Bids

The **Bids** subtab consists of a list of orders that are going through the bidding process and that are in a Request for Bid status.

AVM

The **AVM** subtab consists of a list of orders for Automated Valuation Models. These AVMs can be ordered through Platinum Data.

RCR

The **RCR** subtab consists of a list of orders for Real Condition Reports. These RCRs can be ordered through Platinum Data.

UW

The **UW** subtab consists of a list of orders for which the client company has requested a revision. These orders will be awaiting underwriter review.

Revision Sent

The **Revision Sent** subtab consists of a list of orders for which a revision has been requested and the request has been sent to the appraiser.

staff users can enable their platform to send a reminder to an appraiser regarding the need for a revision by activating the Revision Reminder scheduler (click **Settings > Reminders > Revisions Reminder**, and click **Activate**). When this reminder is enabled, orders in the **Revision Sent** queue for which a revision reminder has been sent to the appraiser will be highlighted yellow.

Revision Received

The **Revision Received** subtab consists of a list of orders for which a revision has been completed and uploaded by an appraiser. After an admin user reviews the revision, they can mark it with the status **Reviewed** or **Completed** by clicking **Reviewed** or **Completed** in the **Action** field of that order entry.

Ready for Review

The Ready for Review subtab consists of a list of orders for which a report has been uploaded that needs to be reviewed. After an admin user reviews the report, they can mark it with the status Reviewed or Completed by clicking **Reviewed** or **Completed** in the **Action** field of that order entry.

Reviewed

The **Reviewed** subtab is intended as a holding area for orders that aren't yet ready to be completed but that have been reviewed by an AMC staff user or Reviewer.

Filtering order queues

Basic Search functionality

Each order queue that an AMC staff user accesses via a status subtab will have a selection of options available that can be used to filter the list to relevant entries. These filtering tools will be visible at the top of each subpage, above the order queue. These options will constitute the Basic Search functionality available from each subpage.

Among these options will be text boxes available for specific information that can be used to identify individual orders; drop-down lists that can be used to refine a list by order details such as, for instance, a particular client company or appraisal type; and selectable options to filter the queue by orders that have been flagged as Priority or Special Care.

Advanced Search functionality

An **Advanced Search** functionality is also available. To access the **Advanced Search** options, a user will direct their mouse to the right side of the status subpage that they're viewing and point their cursor at the **Left-angle-bracket** icon. A ribbon will appear, and when the user clicks **Advanced Search**, a secondary set of drop-down lists will appear that can be used to filter the order queue.

Configurability

An AMC staff user can choose for their own platform-interface some of the filtering options they want to make available for each status subtab. They can choose these options by configuring their **Dashboard** view subtab by subtab (see the section *Configuring available Dashboard Views* for more information).

Order queue filtering tips

Among the tools available to make lists more filterable and particular types of orders more easily singled out, the option to associate [Custom Flags](#) with orders can be very helpful. Assigning flags to orders based on a set of criteria and then, when filtering, selecting the flag type from the **Custom Flags** drop-down list presents a very effective method of isolating an entry type that a user is looking for from a list of entries.

AMC staff users can also quickly find entries for any orders that have been marked as significant for high priority or for special treatment by selecting the **Priority** and/or **Special Treatment** check boxes from among the filtering options.

Other options that warrant special mention are the **E.C.D.** and **Bid Period** drop-down lists available to refine the order queues under the **Due** and **Bids** subtabs, respectively.

Configuring available Dashboard views

An AMC staff user has some choice as to the information that they make visible and the filtering options that they make available for order queues viewed from the **Dashboard** page. As detailed previously, when a user clicks on a subtab option, they get a Dashboard view of the orders that fall under that subtab. Configuring the Dashboard views is about deciding what information pertaining to orders will be most valuable to have available at a glance, and what information types will be most effective at filtering the lists viewable from any subtab option.

Note: Please remember that when staff users configure their **Dashboard** view, they are creating a **Dashboard** experience for themselves. The modifications they make will only be visible from their own platform-interface.

AMC staff users will have the opportunity to configure the Dashboard view for each individual subtab, but the information options available for any given subtab might differ slightly from others. A user can apply the following procedures to configure their Dashboard views.

Instructions for configuring available Dashboard views

1. Direct your mouse to the right side of the landing page, just above the page viewer, and click the **Configure Dashboard** icon.

Note 1: The **Configure Dashboard Fields** dialog box is divided into **Columns** and **Filters** panes. The blocks in the **Columns** pane refer to information that will be provided in the list of orders seen from the Dashboard view of any subtab. The blocks in the **Filters** pane refer to information types that can be used to filter a list of orders seen from the Dashboard view of any subtab.

2. In the **Configure Dashboard Fields** dialog box, click from the horizontal menu that straddles the **Columns** and **Filters** panes the subtab for which the **Dashboard** view will be configured.
3. To alter the information provided in the columns of a **Dashboard** view list, click, drag, and drop any block between the **Inactive** and **Active** columns of the **Columns** pane. The information blocks in your **Active** column reflect the columns that will appear in your Dashboard view list.
4. To change which information types will be part of the Basic filtering functionality for any Dashboard view list and which will be available from the Advanced filtering functionality, click, drag, and drop the blocks between the **Basic** and **Advanced** columns of the **Filters** pane.

Note 2: The pink shaded blocks with red text represent information options that can't be moved between columns in the **Columns** and **Filters** panes. These options have to remain where they are.

5. When you're finished with your configurations, click **Save**.

CHAPTER 8. REPORTS: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Reports tab

The **Reports** tab is accessible from the main tab menu at the top of the landing page. **Staff** users can edit, copy, view, or delete existing reports; create new reports; and setup alerts that will allow reports to be emailed out to designated users, all from the **Reports** tab. Users will also, under the **Reports** tab, be able to view a selection of statistics being tracked by their platform-version.

List Reports page

When staff users click the **Reports** tab, they will land on the **List reports** page. This page displays a list of all reports that have been saved on a platform-version. The reports list is broken up into groups, each **Report Group** reflecting the **Report Type** of the reports organized under it. **Staff** users will select the **Report Type** when creating a new report. A **Report Group** can be collapsed or expanded by clicking the **Collapse/Expand** icon just to the left of a **Report Group** header.

Setting staff and/or client permissions by report

Staff users who have been given the appropriate permission from the **Staff** tab can set up custom permission for any report that's in a report list. To set a permission from the **List reports** page, a staff user will first locate the relevant report entry, and then click the **Lock** icon under the **Staff Permission** or **Client Permission** column.

A **Set Report Permission** dialog box will open in each case. A staff user will select the check boxes associated with the staff or client users that they want to give report permission to, and then they will click **Set Report Permission**.

Staff user permissions will allow the staff user selected to view specific reports. Permissions required to generate or edit reports have to be given from the Appraisal Scope **Staff** tab (go to **Staff > Permissions**).

Client user permissions are used to set permissions by client user types for specific reports. **Client** users given permission for a report will be able to generate that report within their Appraisal Scope **Client** platform-version. These client users will not be able to modify reports.

Modifying a Reports list view

The entries in the reports list are, by default, displayed with eight columns of information. Staff users can modify their list of reports by changing the number and order of columns that appear on their **List reports** page; however, these changes will only remain for the duration of a user's session. After they've logged out, the list will return to its default display when they next log in.

A staff user can click and hold any column header in the reports list, drag it across the header row, and drop it in any new position in the list. A **Prohibited** icon will appear as a column header is being dragged, until the cursor of the mouse reaches the area of a new column header where the column can be dropped. When the **Prohibited** icon is replaced by a **Checkmark** icon, the header can be dropped. Two opposing blue arrows oriented vertically will also appear, indicating where the column will be located if dropped there.

Further modifications can be made to a reports list if a staff user points their mouse to any column header and clicks the drop-down arrow that appears at the header's right-hand side. When a user clicks the arrow, a drop-down list will appear, giving them options to sort the column in ascending or descending order, by group.

Options to limit the columns visible in a reports list are also available from the column header drop-down list. When a staff user clicks **Columns**, a sub-list will appear. Staff users can remove any columns from their reports list view by clearing any of the associated check boxes that appear in this sub-list.

List Reports menu

All of the functionality mentioned in the *Introduction to the Reports tab* section is available from the **List reports** tab menu, which is located just above the reports list. Users will find the **Create new report** tab among the tab menu options, and this tab is always available. All other **List reports** tab menu options provide functionality applicable to existing reports. To perform any action on an existing report, a user will select the check box associated with the relevant report and then select from the **List reports** menu the tab associated with the action they want to perform.

Editing reports

Staff users can edit an existing report by selecting the check box associated with the report they want to edit and clicking **Edit report**. The **Edit Report** page will open, allowing users to modify an existing report using the same tools that are available when building a new report. These tools will be covered in the *Creating a new report* section, and so they won't be detailed here. The edit functionality can be very useful in combination with the **Copy report** tool, allowing users to make a new report from an existing report that shares similar metric requirements.

Note: Reports will not automatically be saved when editing. Remember to click **Save report** in the upper left-hand corner of the **Edit Report** page.

Generating a report view

To generate a view of data returned by an existing report, a staff user will select the check box associated with the relevant report and then click **Generate view**. This will open the **Generated Report** page, which will display the data returned by the report. This data can be exported as an Excel spreadsheet in either CSV or XLSX file types by clicking **Export as CSV** or **Export as XLSX**. If a staff user clicks **Regenerate Report**, the report will run again and regenerate the information.

Note: For reports that contain a large amount of information, it may be necessary, or more efficient, to export the data in a CSV file.

Copying a report

To copy an existing report, a staff user will select the check box associated with the report to be copied and then click **Copy report**. The copied report will appear in the list at the bottom of the same Report Group as the original, and it will have the same name but will be labeled as Copy. The copy functionality can be very useful in combination with the **Edit report** tool, allowing users to repurpose an existing report by modifying the metrics to suit their needs.

Deleting reports

Staff users can delete one or multiple reports from their Appraisal Scope platform-version by selecting one or multiple check boxes associated with reports to be deleted and clicking **Delete** report.

Report alerts

Report alerts are instructions to Appraisal Scope to send the results of a report to select recipients. When setting an alert, a staff user will choose the frequency with which they want a given report to be generated from among a number of options. They will choose the format of the report file that will be delivered, and the people who will receive it. Before finishing their alert, they will also have the option to compose a message that will accompany the report each time it's emailed out to the recipients.

SETTING UP REPORT ALERTS

Initiating a report alert

1. From the **List reports** page, find the report that you want to set an alert for, select the associated check box, and click **Report alert**.
2. In the **Manage Email Alerts** dialog box, you have the choice of selecting an existing alert that's associated with the report from the **Select Existing Alert** drop-down box and modifying it, or adding a new alert.
3. To add a new alert, type the name you want to give it in the **Add New Alert** text box and click **ADD**.
4. If you want the report to be emailed in an XLSX file format, click the **Generate As** drop-down box and select that option; otherwise, move on and schedule the delivery date or frequency.

Note: For reports that contain a large amount of information, it is recommended that the **Generate As** drop-down list be set to the default CSV value.

Setting your delivery cadence

1. If you want to set a specific delivery date for your report, either type the date in the **Generate On** combo box in a mm/dd/yyyy format, or click the calendar button to the right of the box and select the date.
2. If you want the report to be delivered on a certain day each month, click the **Generate Every** drop-down box and select the day.
3. If you want the report to be delivered every set number of days, click the **Generate Every** drop-down box and select the number of days. The day on which you set the alert will be excluded from the calculation.
4. If you want the report to be delivered on a certain day or days of the week, select the check box associated with the day(s) of the week you'd like it to be delivered.
5. The time of delivery is required when setting your alert. Click each **Time** drop-box, and choose the time of day and time zone for report delivery.
6. When you've finished, click **Add Alert Timings**. Your alert parameters will appear in the panel directly beneath the **Add Alert Timings** button.

Note: If you're creating a Report Alert for a report that's using [Dynamic Filters](#), you will be prompted to enter conditions for the filters in this section of the **Manage Email Alerts** dialog box. The Dynamic Filters will appear above **Add Alert Timings**.

Finishing the report alert

1. Enter an email address in the text box at the bottom of the **Manage Email Alerts** dialog box for each intended recipient of the report. Make sure that you separate the email addresses with commas.
2. Click **Save Email Addresses**.
3. If this completes your Report Alert, click **Close**. If instead you'd like to compose a message that will accompany the report delivery email sent out to recipients, click the **Message Body** tab at the top of the dialog box.
4. Type your subject in the **Subject** text box and then type your message in the text editor. When you've finished, click **Save Message** and then click **Close**.

Creating a new report

When a staff user clicks **Create new report** from the **List reports** tab menu, the **Add new Report** page will open. This page is broken into three sections that provide the controls staff users will need to create a report (Figure 8.1).

Staff users will set the report type, name their report, and add a description in Section 1. Section 2 is for setting up the report format. And staff users will create filters in Section 3. The information that follows is structured as a four-stage process for report creation: choosing data sources, formatting a report, applying filters, and finalizing a report.

Note: New reports will not automatically save. Remember to click **Save report** in the upper left-hand corner of the **Add new Report** page after creating a report.

Figure 8.1. Detail of **Add new Report** page showing the three sections used for creating reports.

The screenshot displays the 'Add new Report' page with three distinct sections marked by red circles and arrows:

- Section 1:** Contains fields for 'Report Type' (a dropdown menu), 'Report Name', 'Header alignment', 'Page break', and 'Detail Type'. Below these are text areas for 'Description' and 'Header'.
- Section 2:** Features a 'Search: Find field...' input, a tree view of 'Available fields' (including categories like AMC, Appraisal, Appraiser, etc.), and a 'Sort' section with a 'Group' dropdown.
- Section 3:** Includes a table for creating filters with columns for 'Field Name', 'Operation', and 'Condition'. Above the table are dropdowns for 'Please select the field...', 'Please select the operation...', and 'Please select the condition...', along with 'Add filter', 'Dynamic Data', and 'Empty Data' buttons.

Choosing data sources

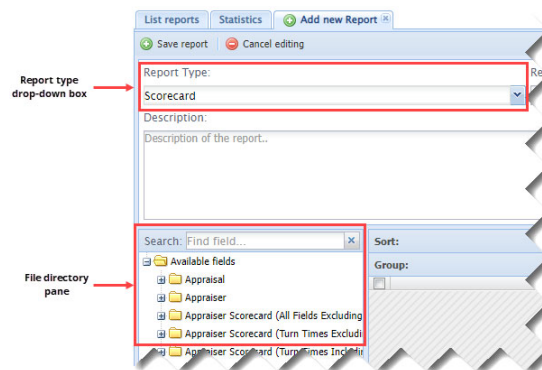
The tasks that fall under the heading of Choosing data sources make up the first few steps in the process for creating a new report. Before carrying out the creation process, a staff user will first need to determine the area on which their report will focus and the data fields from which it will draw. The **Report Type** drop-down box will help with this.

The **Report Type** drop-down box is located in the upper left corner of the **Add new Report** page. When a staff user clicks the drop-down box, they will access a list of options. This list is divided up into six groups that correspond to the areas of an AMC operation managed through the Appraisal Scope platform: **Appraisal (Orders)**, **Client**, **Appraiser**, **Jobtype Lists**, **Staff**, and **Appraiser Panels**. Once a user has decided which of these areas they want to get information about, they will choose from among the options beneath the relevant group header.

When a choice is made in the **Report Type** drop-down list, the sections of the **Add new Report** page that were previously grayed out and inaccessible will become active, and a pane displaying a file directory will show up directly beneath the formatting section and on the left side of the page. This pane will be populated with folders containing the individual data fields that are available for users to create a report with.

The folders that appear here are entirely dependent on the choice that a user makes in the **Report Type** drop-down list. For instance, if an AMC wants to view the Scorecard data pertaining to number of days between acceptance and completion by appraisal company, a staff user would click the **Report Type** drop-down box, scroll down to **Appraiser**, and click Scorecard. The following screenshot provides a cut-away detail showing the result of these actions (Figure 8.2).

Figure 8.2. Detail of **Add new Report** page showing **Report type** drop-down box and File directory panel.



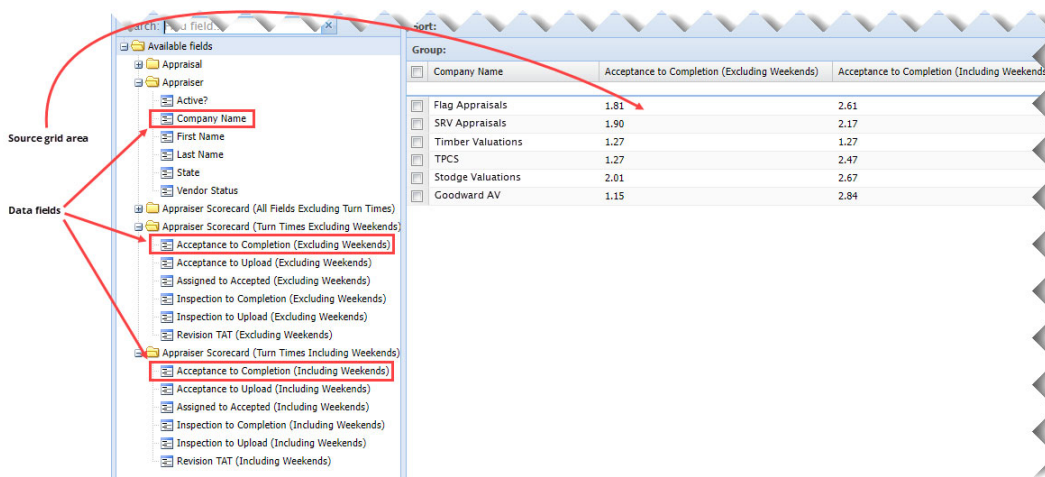
Note: The file directory pane can be expanded by clicking the right border of the pane and dragging it to the right. This will allow the data field files to be more easily seen.

Individual data fields that are grouped within the folders of the file directory pane can be accessed by clicking the **Plus** icon next to a folder. We can stay with the Scorecard report example previously referenced to illustrate how to continue creating a report.

Let's imagine that the AMC wants to create a Scorecard report that gives them the number of days between a company accepting an order and completing the order. We will assume that they want two variations of the data, one that excludes weekends and one that includes weekends, to see if a company is working over the weekend. A staff user would click the **Plus** icon next to the **Appraiser**, **Appraiser Scorecard (Turn Times Excluding Weekends)**, and **Appraiser Scorecard (Turn Times Including Weekends)** folders to reveal the data fields available there.

Next, the user would drag the individual data fields **Company Name**, **Acceptance to Completion (Excluding Weekends)**, and **Acceptance to Completion (Including Weekends)** into the Source-grid area of the page. As individual data fields are dropped into the Source-grid area of the page, they create columns in the report. The following screenshot shows what the report will look like as the fields are dropped into the main area of the source grid ([Figure 8.3](#)).

This screenshot gives us a view of the raw information returned as data fields are dragged into the grid area. The most important takeaway here is that each individual option in the file directory panel will produce a column of data when dropped into the grid area. The next steps will involve arranging this information in ways that will place the focus on the most important details.

Figure 8.3. Detail of **Add new Report** page showing individual Data fields and Source-grid area.

Formatting a Report

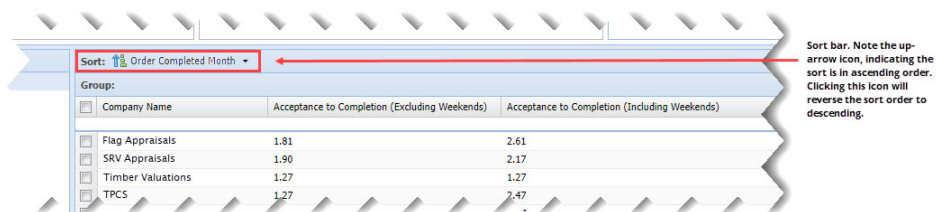
SORT FUNCTIONALITY

Once a staff user has determined the data fields that they want to use when populating their report, they will have options for how they want to present the report information. The first option to mention is the **Sort** functionality available for reports. The **Sort** functionality allows users to view the data in a report in ascending or descending order, according to the data element chosen to sort by. When **Sort** functionality is applied, it will also be applied to the report data in CSV or XLSX exports, making these exported files easier to work with.

Users can apply a sort to report data in two different ways. One way to apply **Sort** functionality would be to click the column header associated with a column in the report. This will apply an ascending sort to the data in the column, and the rest of the information in the report would be rearranged to reflect this sort. Clicking the same header again would switch the sort to descending. It makes sense to apply **Sort** functionality in this way when a user wants the data field being sorted by to also appear in the body of the report.

Note: When a header is clicked, a small triangle will appear pointing up to indicate that the ascending sort has been applied to the column. When it's clicked again, the triangle will point down to indicate the descending sort.

Another way to apply a sort to the report data is to use the **Sort** bar. To show how to set up a report with an information sort of this type, we will return to the Scorecard example again. The staff user has decided to use the **Order Completed Month** data field to sort the information in their report. They will drag the **Order Completed Month** data field from the file directory pane into the **Sort** bar and drop it there. All of the other data fields used in the report will remain the same (Figure 8.4).

Figure 8.4. Detail of **Add new Report** page showing a sorted report.

Sort bar. Note the up-arrow icon, indicating the sort is in ascending order. Clicking this icon will reverse the sort order to descending.

Sorting the Scorecard report this way produces a view of appraisal company statistics where statistics from the earliest month will be at the top of the report. If we imagine the statistics collected to go back three months, then what we're seeing is statistics of the four companies in Figure 8.3 from three months prior.

Statistics for these four companies would again be repeated two more times in the list, once for two months prior, and once for one month prior.

It makes the most sense to apply Sort functionality using the **Sort** bar in this way when a user wants to sort the report by a particular data field but doesn't want that data field to appear in the body of the report. Looking beyond the example provided here, one of the most common data elements to sort by would be one that provided dates. Sorting a report in ascending order by date always places data from the earliest, or oldest, records at the top of the report. Switching to descending order by date would place data from the latest, or most recent, records at the top.

GROUP FUNCTIONALITY

Report data can also be grouped by a specific data element. Reports can be set up to group data in much the same way as they are set up to sort data. Instead of dropping a data field in the **Sort** bar, though, the data field will be dropped in the **Group** bar. When the Group functionality is used on a report, the body of the report will be broken up into groups, with the grouping data element serving as a header for each group. When Group functionality is applied, it will also be applied to the report data in CSV or XLSX exports, making these exported files easier to work with.

To illustrate Group functionality, we'll assume that our AMC is creating a different type of Scorecard report. In this case, the AMC wants to get data about their client companies. To achieve this, a staff user will need to start with a different **Report Type**. They will click the **Report Type** drop-down box, this time scroll down to **Client**, and then click **Scorecard**.

The AMC wants to know what the **Acceptance to Completion** statistics are on the client side, and they want the data presented by **Account Type** (for example Bank, Credit Union, or Wholesale Lender). They also want to see these statistics by month.

The staff user will first drag the **Account Type**, **Acceptance to Completion (Excluding Weekends)**, **Acceptance to Completion (Including Weekends)**, and **Order Completed Month** data fields into the Source-grid area, and drop them there. In order to make the report easy to read when they export it, they want to group the data. To apply the Group functionality, the staff user will click the **Account Type** data field entry again in the file directory pane, drag the entry to the **Group** bar, and drop it there. This will ensure that all of the data will be presented in groups broken up by the type of account they pertain to. The following screenshot shows what this report will look like (Figure 8.5).

Figure 8.5. Detail of **Add new Report** page showing a grouped report.

The screenshot shows a software interface for creating a report. On the left, there is a 'Search: Filter field' and a list of 'Available fields' including 'Appraisal', 'Client', and 'Client Scorecard' variants. On the right, the 'Sort' bar is empty, and the 'Group' bar is set to 'Account Type'. Below the 'Group' bar, the report data is displayed in a table format, grouped by account type. A red arrow points to the 'Account Type' field in the 'Group' bar with the text 'Data field appearing in the Group bar.'

Account Type	Acceptance to Completion (Excluding Weekends)	Acceptance to Completion (Including Weekends)	Order Completed Month
Account Type: Bank			
Bank	7.40	10.61	08/2022
Bank	6.70	9.50	09/2022
Bank	12.23	18.23	10/2022
Account Type: Correspondent Lender			
Correspondent Lender	10.11	14.11	09/2022
Correspondent Lender	4.18	5.83	08/2022
Correspondent Lender	4.46	6.20	09/2022
Correspondent Lender	3.07	5.07	10/2022
Correspondent Lender	3.48	5.48	08/2022
Correspondent Lender	1.87	3.59	09/2022
Correspondent Lender	7.36	10.98	10/2022
Account Type: Credit Union			
Credit Union	5.12	7.40	08/2022

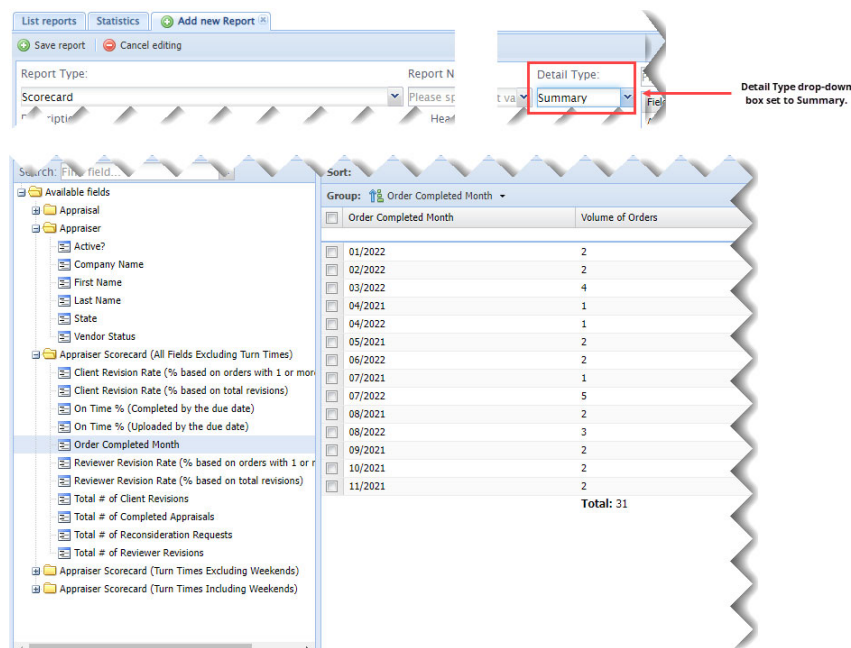
Group and Sort functionality can also be used together. To sort grouped data, a staff user could choose the column of data that they want to sort by and click on the column header. This would apply an ascending data sort to each group separately. Clicking the header again would switch the sort to descending.

OPTING FOR A SUMMARY VIEW OF REPORT DATA

Staff users have the option, when creating reports, of providing a summary view of the data that the report will compile. By default, Appraisal Scope will provide a **Detail** view of any report, so a staff user will need to change the report view to **Summary** if they want to see information in summary view. They can do this by clicking the **Detail Type** drop-box, located at the end of the top row of controls in the upper left section of the **Add new Report** page, and selecting **Summary**.

To see how this can work, we'll return to the appraiser version of the Scorecard report, and we'll assume that the staff user wants to look at the volume of orders that have gone into making the appraiser scorecard stats. They want to see how these orders come out on a per month basis. Using the **Summary** view option, their report would look like Figure 8.6.

Figure 8.6. Detail of **Add new Report** page showing the **Detail Type** drop-down box.



The staff user has pulled the **Total # of Completed Appraisals** and **Order Completed Month** data fields into the Source-Grid, and they've also pulled the **Order Completed Month** data field into the Group bar. They then changed the **Detail Type** from Detail to **Summary** in order to get the summary view.

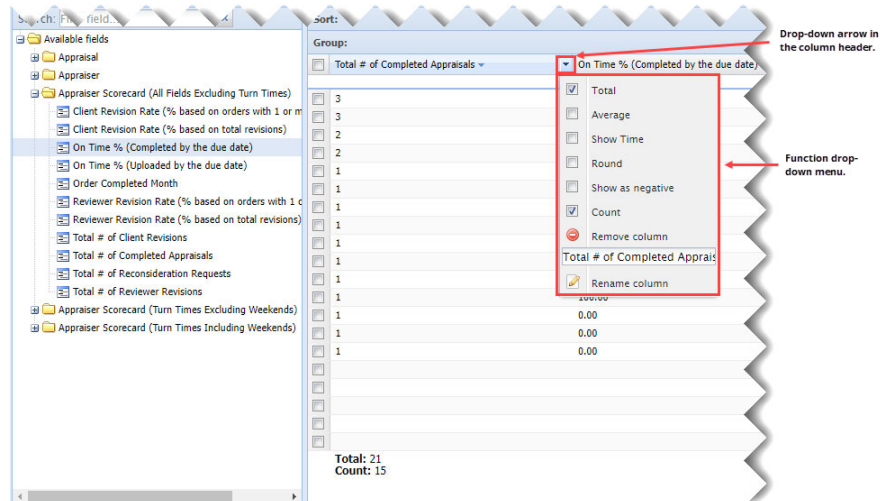
Note: The **Total # of Completed Appraisals** column header changes to **Volume of Orders** in summary view. This reflects the fact that the summary view displays the total number of items in a group.

USING THE FUNCTION DROP-DOWN LIST

For any column of data produced in a report, staff users can choose to apply any of several statistical functions available in the **Function** drop-down list. A staff user can use the options in the **Function** list to calculate a total or an average, to round the data, to show data as negative, or to provide a count of the data values displayed in a given column. Along with the statistical functions, users will also find options there to show time details, and to remove or rename the column of data.

To access the **Function** drop-down menu, a user should drag their mouse pointer into the column header associated with the information they want to apply a function to. The **Function** drop-down menu will appear when the user clicks the drop-down arrow in the right-hand side of the box (Figure 8.7).

Figure 8.7. Detail of **Add new Report** page showing the **Function** drop-down menu.



REARRANGING COLUMNS OF DATA

To rearrange the order of the columns in a report, staff users can click and hold a column header, drag it to a different position among the data columns, and drop it there.

Applying filters

Report filters are rules that focus report information by limiting the data returned from selected data fields. A staff user can create filters to apply to their report in the top right section of the **Add new Report** page.

FILTER DATA FIELD

To create a filter, staff users will begin by selecting the data field that they want to apply as a filter parameter to the report. This is done in the combo box displaying the text **Please select the field** (i.e., the **Data Field** combo box). Users can type in the text box here, if they choose, and the text box will serve as a dynamic search filter, narrowing the choice of fields to those containing the letters typed into the box. Users can also click the drop-down arrow, and the full drop-down list will appear.

The options in the drop-down list will consist of the same data fields available for the chosen **Report Type**. In other words, they will match up with the data field options that appear in the file directory panel on the left side of the **Add new Report** page.

Note: The data field chosen here does not have to be one that appears in the body of the report.

FILTER OPERATOR

The next step in creating a filter will be to select from the options that appear under the drop-down box displaying the text **Please select the operation** (i.e., the **Operator** drop-down box). The operators available here will depend on the chosen data field. For instance, if the data field contains numerical data, the operators will consist of various combinations of =, <, and >. If the data is in the form of text, operators such as **CONTAINS** or **BEGINS WITH** will appear.

The following table provides definitions of the operators available from the **Operator** drop-down box.

Operator	Use	Example
=	To select only the data in a chosen data field that has the same value as the created filter condition.	Applied to the Appraisal Form field, can isolate orders that explicitly return the field condition "URAR 1004".
<>	To select only the data in a chosen data field that does not have the same value as the created filter condition.	Applied to the Property type field, isolates orders with all property types except for the entered field condition (e.g. mobile homes).
DOESN'T CONTAIN	To select only the data in a chosen data field that does not contain the value given in the filter condition.	Applied to the Process Status field, when "cancelled" is entered in the condition field, returns orders in any status except for ones that have been cancelled.
CONTAINS	To select only the data in a chosen data field that does contain the value given in the filter condition.	Applied to the Best Person to Contact field and paired with the Empty Data button, returns all orders that have no Best Person to Contact information.
BEGINS WITH	To select all data in a chosen data field where the information begins with the value given in the filter condition.	Applied to the Branch field, when "commercial" is entered in the condition field, returns all commercial business branches.
ENDS WITH	To select all data in a chosen data field where the information ends with the value given in the filter condition.	Applied to the Submitted By Email field, isolates all orders where the email address ends with a specific domain (e.g. @corelogic.com).
IN (Separated by ;)	To return multiple conditions for a chosen data field. Conditions must be separated by a semicolon.	Applied to the Intended Use field, when "Ascertain Market Value" or "Other" are entered into the condition field and separated with a semicolon, the results will be everything that has either or both of those Intended Use values.
NOTIN (Separated by ;)	To exclude multiple conditions for a chosen data field. Conditions must be separated by a semicolon.	Applied to the State field, when AK and HI are entered into the condition field and separated by a semicolon, jobtype pricing is returned for all states except Alaska and Hawaii.

Additional operators available for data fields with Date and Time values

When a data field is chosen that references dates (e.g., **Order Dates**), the following operators will be available to use in the operation field when building a report.

Date and Time **Operators**.

- **Next Completed Day**
- **Next Completed Week**
- **Next Completed Month**
- **Last Completed Day**
- **Last Completed Week**
- **Last Completed Month**
- **Month to Date**
- **Year to Date**

The term "Completed" as used in the Date and Time Operators listed here determines what counts as a relevant unit of time for reports purposes. Operators that reference the future should be understood to be referencing units of time beginning with the first complete unit of time following the day the report is run. For the **Next Completed Day**, this would be the day following. For the **Next Completed Week**, it would be the week beginning the Sunday (or Monday, if weekends are excluded) following the day the report is run. For the **Next Completed Month**, it would begin on the first of the next full month.

As an example of how these Date and Time Operators referencing the future can be used, we can imagine that a staff user wants a report returning data for orders with due dates over the three days following the day they run the report. They would use **Next Completed Day** as the operator and enter the number three as the filter condition. The order data returned would be for all orders with due dates over those next three days following the day the report was run.

Operators that reference the past—the **Last Completed Day**, **Week**, or **Month**—should be understood to be referencing units of time ending with the last complete unit of time preceding the day the report is run. For the **Last Completed Day**, this would be the last complete day preceding the day the report is run. For the **Last Completed Week**, it would be the week ending the Saturday (or Friday, if weekends are excluded) preceding the day the report is run. For the **Last Completed Month**, it would be the month that was completed prior to the date when the report is run.

As an example of how these Date and Time Operators referencing the past can be used, we can imagine that a staff user wants a report returning data for orders with order dates over the two months completed prior to the month they run the report. They would use **Last Completed Month** as the operator and enter the number two as the filter condition. The order data returned would be for all orders with order dates falling within the two months completed prior to the month in which the report was run.

Note: Using a 1 or a 0 in non-numerical fields returns a True or False statement (1 = True, 0=False).

FILTER CONDITION

The final step in creating a filter will be to select the condition. The condition might be a date or numerical value, or it might be a specific word that the staff user wants to set as a condition of filter application. In other words, if a staff user wanted data in a report to be limited to only dates falling after a specific date, the condition would be that specific date, and it would be used in conjunction with the operator >.

The condition will be entered in the box displaying the text **Please select the condition** (i.e., the **Condition** box). Whether this box acts as a text box or a drop-down box will also depend on the type of data found in the filter's data field. For instance, if the data field contains dates, the conditional box will act as a drop-down box. When a staff user clicks on it, a drop-down in a calendar format will appear.

To see how a simple filter would function, we can look again at a version of the Scorecard report. In this case, the staff user wants to look at the number of appraisals completed since January of 2022 to which scorecard criteria have been applied. They will drag the **Order Completed Month** and **Total # of Completed Appraisals** into the Source-grid area and drop them there. Next, they will want to create their filter. Figure 8.8 shows what the user sees when creating the filter, and the view of report data that results after the filter is applied.

Figure 8.8. Detail of **Add new Report** page showing a report filter.

The screenshot shows the 'Add new Report' page with a filter configuration. The filter is set to 'Order Completed Month' with the operator '>' and a condition of '2022'. The report data shows a list of dates from 03/2022 to 07/2022 with corresponding counts of completed appraisals.

Group:	Order Completed Month	Total # of Completed Appraisals
03/2022		1
08/2022		1
03/2022		1
02/2022		2
03/2022		1
08/2022		1
02/2022		1
03/2022		4
04/2022		1
06/2022		4
07/2022		4
08/2022		5
06/2022		2
07/2022		1
07/2022		1
07/2022		1
07/2022		1

After setting the filter criteria, the staff user will click **Add filter**. This will add the filter to the pane beneath the filter controls. Each filter that has been created for a report will be stored here in a list. **Staff** users can edit a filter in this list by clicking the **Pencil and Paper** icon associated with the filter. Users can delete a filter by clicking the **Red Minus** icon.

The filter list can also be sorted by column. A user can click any column header to toggle between an ascending or descending sort based on that header (i.e., **Field Name**, **Operation**, or **Condition**), or they can point their mouse to the column header and click the drop-down arrow that appears at the header's right-hand side.

APPLYING DYNAMIC DATA FUNCTIONALITY

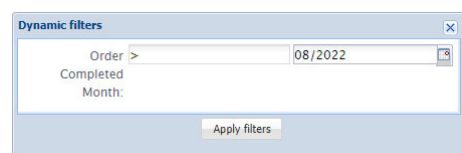
Applying the Dynamic Data functionality to a filter will make that filter dynamic. When Dynamic Filters have been applied to a report, a dialog box prompting the user to enter a condition will appear each time before the report is manually generated, or before a Report Alert is finalized for the report. This functionality allows users to create reports that will produce the most up-to-date information.

Staff users can apply the Dynamic Data functionality when they're creating a filter. After the data field and operator choices have been made for the filter, the staff user will click **Dynamic Data**. The **@@DYNAMIC_DATA@@** tag will appear in the Condition box, and the staff user will then click **Add filter**.

To see how the Dynamic Filter will work on a report, let's return to the Scorecard report detailed in Figure 8.8. In this case, the staff user wants at the beginning of each month to see the orders that have gone into the scorecard statistics for the month prior. They will use the same Data Field and Operator as they used in Figure 8.8 when creating their filter, but they will select **Dynamic Data** for the Condition. This will ensure that Appraisal Scope prompts them to add a Condition when they generate the report.

The staff user has saved the report, and it is available from the **Report** list on the **List reports** page. When the user selects the report and clicks **Generate view**, the **Dynamic filters** dialog box will open (Figure 8.9). They will then either enter the month prior in the date text box using the mm/yyyy format, or they will click the **Calendar** icon and select the month. Using the Dynamic Filter allows them to perform this operation each time they generate the report.

Figure 8.9. **Dynamic filters** dialog box.



Note: Dynamic Filters applied to a report will also require that a user go through this same procedure when setting up a Report Alert.

APPLYING EMPTY DATA FUNCTIONALITY

Staff users can use the **Empty Data** functionality to create a condition that applies only in cases where the data field has a value of 0, or where it contains no data at all. This could produce reports, for instance, that limit data by the data field parameter to only instances where that data field has a value of 0/empty (in cases where the operator = is used), or perhaps only instances where that data field has a value greater than 0/empty (in cases where the operator > is used).

To apply the **Empty Data** functionality to a filter, the staff user will click **Empty Data** as their choice of condition. The filter condition will then display the **@@EMPTY_DATA@@** tag.

Note: The **IN** and **NOTIN** operators cannot be used in conjunction with the **Empty Data** condition.

APPLYING CURRENT DATE FUNCTIONALITY

The Current Date functionality becomes available when a Date and Time–based data field is selected. The **Current Date** button will be visible next to the **Empty Data** button in the **Add new Report** page when this functionality is available.

Current Date functionality can be used with combinations of the <, >, and = operators. When Current Date is chosen, the report will return data using the date that the report is run as the condition. This can be useful in combination with the = operator, for example, ensuring that a report will return information that corresponds to the day that the report is run each time the report is run.

To apply the Current Date functionality to a filter, the staff user will click **Current Date** as their choice of condition. The filter condition will then display the @@CURRENT_DATE@@ tag.

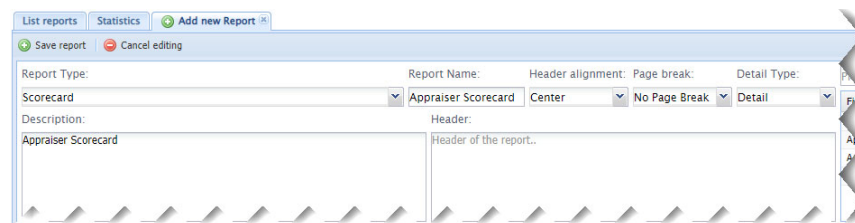
Finalizing report

The last tasks that a staff user will want to complete will require a return to Section 1 of the **Add new Report** page (see [Figure 8.1](#)). If a staff user hasn't yet named their report or given it a description, they will want to do this at this point. The report name and description will accompany the report in the **Reports** list.

Staff users can also apply formatting instructions at this point that will dictate how a report will look when it's exported. To add a header that will appear atop the exported report file, a staff user will enter information in the **Header** text box. The user will then click the **Header alignment** drop-down box and choose whether to show the header aligned **Left**, **Center**, or **Right**.

If the staff user has created the report using the Group functionality, they may want to set page breaks for their exported report. If they click the **Page break** drop-down box and select **After Group**, their report will break to a separate, printable page after each group. [Figure 8.10](#) gives a view of these options found in Section 1 of the page.

Figure 8.10. Detail showing selections made that will impact how an exported file is laid out.



The final task is to save the report by clicking **Save report** in the upper left corner of the **Add new Report** page. Reports, once saved, will appear in the **Reports** list and will be editable from the **List reports** page.

Statistics page

The **Statistics** page is accessed by clicking the **Statistics** tab, located just to the right of the **List reports** tab. The **Statistics** page provides a selection of commonly viewed statistics for staff users who want an up-to-date view of turn times for the month; a count of the orders placed that day; a count of orders due on a given day, the next day, and within a seven-day time frame; or a running tally of accounting numbers.

Note: The turn-time values can be set to exclude weekends and/or hold time.

CHAPTER 9. ACCOUNTING: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Accounting tab

The **Accounting** tab is accessible from the main tab menu at the top of the landing page. Financial information stored in an AMC's platform-version can be accessed via this tab, allowing an AMC to manage their accounts receivable and accounts payable, pay appraisers, send invoices, and calculate commissions. The **Accounting** tab also offers an interface with the **QuickBooks** Desktop integration, for those AMCs using this integration.

Accounting tab menu

Staff users can access the financial information associated with order records through the **Accounting** tab menu. Several of the tabs in this menu correspond to account statuses, for instance **Unpaid** or **Paid**, **Appraiser Unpaid**, and **Pending ACH**.

Invoice and commission records are accessible from the **Client Invoices** and **Commissions** tabs, respectively. AMCs managing their accounts through the **QuickBooks** desktop integration can view **QuickBooks** actions and statuses from the **QuickBooks** tab. The **Appraisers Statement** tab allows CSV and/or **PDF** files pertaining to appraiser fees paid over a specific period of time to be manually generated. These files can be downloaded locally or delivered to a specific appraiser via email.

Note: Delivery of **Appraisers Paid** statements can be automated by enabling the **Generate Appraiser Daily Digest** setting, accessible by going to **Settings > Options > Reporting > Generate Appraiser Daily Digest**.

The number that appears above the text description of each tab represents the number of records accessible from any page. The records can be filtered with the Search functionality available on these pages.

Accounting tab management controls

Filtering and grouping order records

Financial information connected to individual order records is accessible from all tabs on the **Accounting** tab menu, with exception of the **Client Invoices**, **Appraisers Statement**, **QuickBooks**, and **Aging Balance** tabs. Staff users can filter the order records listed in the pages by using a variety of parameters. For instance, if staff users need to find a specific record or records that share a particular characteristic (for example, all records of orders placed in February of a particular year), the **Search** functionality will allow them to accomplish this.

The **Search** functionality available from each page can vary to some extent, depending on the accounting tasks to be carried out from the page, but generally speaking, users can limit the number of records viewable in a list to those records returned by the **Search** function.

Order records can also be grouped together on these pages in useful ways, for example by client or appraiser. The **Group by** options available on the pages provide this functionality.

List views and navigation controls

The financial information and order records are organized into lists. By default, when a staff user accesses a page, all entries for records that fall under that tab will be displayed together in one comprehensive list. From here, staff users can filter and focus in on the record entries in ways that limit the number of records that appear, making it easier for users to perform accounting tasks.

Sorting lists

Regardless of the list view that a staff user is utilizing, there are controls available to manipulate the list in helpful ways. Records in a list can be sorted by category by clicking any column header that displays vertically oriented angle brackets. When the header is clicked, the list will automatically sort by the category that the header represents.

Lists can be sorted categorically either with an ascending sort, or a descending sort. For columns with alphabetical information (for example the **Client** column), ascending sort would mean from A to Z; for numbers, from 0 to 9; and for dates, from earliest to latest (i.e., most recent). A descending sort would provide the reverse.

A user can toggle between ascending and descending sorts in any category by clicking the column header multiple times.

Limiting list entries per page

For particularly large lists, the number of entries per page can be controlled by clicking the **Per Page** drop-down box at the bottom of a page and selecting from the list the number of entries to be displayed. Where needed, navigation controls are also available at the bottom of a page, allowing users to move through the pages of a list.

Accessing order records from lists

Finally, if a staff user needs to access an order record and all menu options available for that record under the **Appraisals** tab, they can do this by clicking on that record entry in the list. Most of the fields under the columns of a list are clickable and will take the user to the order record.

Managing accounts receivable

Accounts receivable are managed from the **Unpaid** and **Paid** pages. The **Unpaid** and **Paid** tabs are the first two tabs on the **Accounting** menu. All orders in either an Unpaid or Paid status will be viewable in a variety of list views from these pages.

The **Unpaid** page is accessed by clicking **Unpaid** in the **Accounting** menu. The **Unpaid** tab gives access to all orders in an Unpaid status. **Orders** will remain in an Unpaid status until all outstanding client fees have been accounted for, at which point the orders will switch to the **Paid** status and will then be accessible from the **Paid** page. The **Paid** page will provide records for all orders for which there are no outstanding client fees.

Unpaid tab

The records for all orders that are in an Unpaid status can be accessed on the **Unpaid** page. Among the options for filtering records (see the *List views and navigation controls* section for details), staff users can utilize the **Group By** collection of controls, located underneath the collection of text and drop-down boxes that make up the **Search** panel, to get a more focused view of all orders that remain in an unpaid status.

When the user selects **Client**, the list will segment into smaller collections of records organized under the name of the client company that they share. This functionality can be particularly useful when managing accounts receivable, allowing a staff user the ability to view by client company all outstanding fees.

Staff users will find totals for the **Client Fee**, **Amount Paid**, **Balance Due**, **App Fee**, and **P/L Amount** columns beneath each group (if a user is grouping the records) and at the bottom of the list (or list page, if the list is spread over multiple pages). Appraisal Scope will provide a **Page Total** and a **Grand Total**. The **Page Total** will be the same as the **Grand Total** for one-page lists. For multi-page lists, the **Page Total** provides the total for the page, and the **Grand Total** provides the total for the entire list.

IMPORTING CHECKS

Data pertaining to checks received can be mass imported in a spreadsheet from the **Unpaid** page by using the **Import Checks** functionality. Before performing the upload, a staff user should make sure that the spreadsheet has the following four columns and column headers: **File Number**, **Check Number**, **Check Date**, and **Amount**. The **File Number** values in the spreadsheet will need to match the values that are associated with the relevant entries in the **File#** column of the list. The spreadsheet will need to be saved as a CSV file before upload.

1. To import checks from the **Unpaid** page, click **Import Checks**, just above the list on the right side of the page.
2. Click **Select File** in the **Import Checks** dialog box, and select your CSV file.
3. Drag each tile from the **Imported File** column on the left and drop them in the corresponding spaces in the **Import Checks Data** column on the right.
4. Click **Import**.
5. If the import is successful, the record entries associated with the checks data will no longer appear in the list on the **Unpaid** page. They will automatically move to the **Paid** page.

MARKING INDIVIDUAL ORDERS AS PAID

Data pertaining to payments can be entered on a per-order basis from the **Unpaid** page by using the **Mark as Paid** functionality. The following procedures detail how this is done.

1. To mark an order as **Paid** from the **Unpaid** page, first locate the applicable record entry.
2. Next, Click **Mark as Paid** in the **Change Status** column of the record entry. The entry will expand.
3. Enter values in the **Check#** and **Amount** text boxes, and add information, if relevant, in the **Memo** text box. Click **Save**.
Note: Information added in the **Memo** text box will appear in the **Memo** column on the **Paid** page in association with this same order record.
4. **Order** record entries for orders marked as Paid will move to the **Paid** page, and a communication will be sent out to relevant parties.

ENTERING PAYMENT DATA FOR PAYMENT COVERING MULTIPLE ORDERS

Data pertaining to a payment that covers multiple orders can be entered from the **Unpaid** page by using the **Pay Multi** functionality. The following procedures detail how this is done.

1. To enter payment data for multiple orders, first locate the applicable record entries.
2. Select each check box in the far-right column of the list associated with an applicable record. If you want to select all entries in a list view for this purpose, click the check box in the header row above the column.
3. Next, click **Pay Multi**, located just above the list and to the right of **Generate Invoice**.
4. The **Check#** and **Date** text boxes will appear, and you will see the total balance to be accounted for to right of the **Date** text box.
5. Enter the check number and adjust the date, if necessary, and then click **Save**.
6. The record entries lumped under this payment will no longer appear in the list. They will automatically move to the **Paid** page.



Caution: There is no way to “undo” this process if multiple files are marked as Paid by mistake. Any file(s) unintentionally marked as Paid will need to be changed from the order record(s) associated with the file(s).

EXPORTING ORDER DATA—UNPAID ORDERS

The **Export** feature is most useful in cases where a staff user has refined their **Order** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located just above the list and to the right of **Import Checks**, all data for the orders appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list up through the **Status** column.

GENERATING INVOICES

Invoices can be generated from the **Unpaid** page. The following procedures detail how this is done.

1. To generate an invoice, or invoices, from the **Unpaid** page, first locate the applicable record entries.
2. Select each check box in the far-right column of the list associated with an applicable record. If you want to select all entries in a list view for this purpose, click the check box in the header row above the column.
3. Next, click **Generate Invoice**.
4. When the Add **Description** text box comes up, type in any descriptive information pertaining to the invoice that you would like to appear along with the invoice record on the **Client Invoices** page. Click **Save**.
5. The invoice, once generated, will appear on the **Client Invoices** page, and the invoice number will also appear in the **Inv No** column of the list on the **Unpaid** page.

Paid tab

The records for all orders that are in a Paid status can be accessed on the **Paid** page. The same filtering and grouping options are available from the **Paid** page as are available from the **Unpaid** page. Lists viewed from the **Paid** page will have three columns that are not seen in lists on the **Unpaid** page: **Memo**, **Check#**, and **QB Sync Status**.

Information added in the **Memo** text box when an order is marked as paid will be available in the **Memo** column. The information is accessible by clicking the **Clipboard** icon.

The **Check#** column will display the check number associated with a paid order. If multiple payments were made to cover order fees, the check number that will display will be for the check that covered the Balance Due amount. In the case of multiple payments, the **Clipboard** icon will appear, and transaction details will be accessible by clicking this icon.

For AMCs using the **QuickBooks** Desktop integration, the information in the **QB Sync Status** column will tell the user whether the financial data was successfully passed through to QuickBooks.

staff users will find totals for the **Client Fee**, **App Fee**, and **P/L Amount** columns beneath each group (if a user is grouping the records) and at the bottom of the list (or list page, if the list is spread over multiple pages). Appraisal Scope will provide a **Page Total** and a **Grand Total**. The **Page Total** will be the same as the **Grand Total** for one-page lists. For multi-page lists, the **Page Total** provides the total for the page, and the **Grand Total** provides the total for the entire list.

EXPORTING ORDER DATA—PAID ORDERS

The **Export** feature is most useful in cases where a staff user has refined their **Order** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located just above the list, all data for the orders appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list up through the **QB Sync Status** column (with the exception of the **Memo** column data).

Client Invoices tab

The **Client Invoices** tab allows staff users to manage the invoices that they've generated from the **Unpaid** tab. Staff users can access all invoices that have been generated from their platform-version from the invoice list here. Any text that was added by a staff user to an invoice is viewable by clicking (**view**) next to the invoice description in the **Description** column.

Among the filters available to narrow the list of invoices is the **Paid Status** drop-down box. This drop-down box allows users to limit the invoice records in a list to those that are in **Paid**, **Unpaid**, and/or **Partial Paid** statuses. A staff user can use this control by clicking the drop-down box, located above the list and to the left of the page, just above the **Group By** selections, and selecting the check box(es) associated with the status(es) that they want to limit their list to.

EXPORTING CLIENT INVOICES

The **Export** feature is most useful in cases where a staff user has refined their invoice list using the **Search**, **Group By**, or **Paid Status** functionality. When a user clicks **Export**, located in the control options to the right of the page and atop the list, all data for the invoices appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the invoices in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list.

DELETING, DOWNLOADING, AND/OR EMAILING CLIENT INVOICES

To delete, download, or email invoices, a staff user will first need to select the check boxes associated with the invoices that they want to perform an action on. These check boxes are located in the far-right column of the list. To delete invoices at this point, the user will click **Delete** from the menu of control options to the right of the page and atop the list.

If staff users want to download or email invoices, they will want to select the file format of the invoices before performing these actions. To make the file format selection, a user will first click the drop-down box located last in the menu of control options atop the invoice list. A staff user can then choose **PDF**, **XLS**, or **Both** from the list of options in the drop-down box. From here, if the user wants to download the invoice, they will click **Download** from the menu of control options to the right of the page and atop the list.

Note: If **Both** is selected from the drop-down box, the **PDF** and **XLS** files will be zipped (compressed) and accessible from a ZIP folder.

To email invoices, a staff user will click **E-mail** from the menu of control options after selecting the invoices from the list. In the **Company E-mails** dialog box, the staff user will first select the users to whom the email will be sent. They can choose from client users by clicking the **Send Invoice as Email To** drop-down box and selecting the check boxes associated with any client users that they want to receive the invoice. They can also choose to send the invoice to a user who isn't among an AMC's client users by entering an email address in the **And/Or** text box. Any remarks they would like to include in the email can be entered in the **Remarks** text box before they click **OK** to send the email.

Managing accounts payable

Appraiser Unpaid tab

The **Appraiser Unpaid** page will display orders that carry an appraiser fee balance due. The same type of filtering and grouping options are available from the **Appraiser Unpaid** page as are available from the **Unpaid** and **Paid** pages. [Grouping records in a list by appraiser](#) can be very useful from this page. To accomplish this grouping, a staff user will select **Appraiser** from among the **Group By** options, located just above the list on the left-hand side of the page.

Staff users will find totals for the **Client Fee**, **App Fee**, and **P/L Amount** columns beneath each group (if a user is grouping the records) and at the bottom of the list (or list page, if the list is spread over multiple pages). Appraisal Scope will provide a **Page Total** and a **Grand Total**. The **Page Total** will be the same as the **Grand Total** for one-page lists. For multi-page lists, the **Page Total** provides the total for the page, and the **Grand Total** provides the total for the entire list.

IMPORTING CHECKS

Data pertaining to checks paid can be mass imported in a spreadsheet from the **Appraiser Unpaid** page by using the **Import Checks** functionality. Before performing the upload, a staff user should make sure that the spreadsheet has the following three columns and column headers: **File Number**, **Check Number**, and **Check Date**. The **File Number** values in the spreadsheet will need to match the values that are associated with the relevant entries in the **File#** column of the list. The spreadsheet will need to be saved as a CSV file before upload.

1. To import checks from the **Appraiser Unpaid** page, click **Import Checks**, just above the list on the right side of the page.
2. Click **Select File** in the **Import Checks** dialog box, and select your CSV file.
3. Drag each tile from the **Imported File** column on the left and drop them in the corresponding spaces in the **Import Checks Data** column on the right.
4. Click **Import**.
5. If the import is successful, the record entries associated with the checks data will no longer appear in the list on the **Appraiser Unpaid** page. They will automatically move to the **Appraiser Paid** page.

EXPORTING ORDER DATA—APPRAISER UNPAID

The **Export** feature is most useful in cases where a staff user has refined their **Order** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located just above the list and to the right of **Import Checks**, all data for the orders appearing in the list will be exported.

We must reiterate that *all* data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list up through the **Status** column.

PAYING MULTIPLE TRANSACTIONS VIA ACH

Staff users can use the Pay Multi ACH functionality to pay multiple transactions at once through the ACH Works integration (for information about this integration, refer to the *Managing ACH transactions: the ACH Works integration and Pending ACH tab* section). Pay Multi ACH functionality can be used to pay appraisers and appraisal companies.

staff users can first group list entries by appraiser or filter the list by appraisal company and select the check box in the header of the far-right column, or they can select the check boxes associated with specific orders for which they will initiate an ACH payment. They will then click **Pay Multi** ACH to transfer payments.

This functionality will not work for paying appraisers who do not have ACH information on file. The **Action** column of the list will display **No ACH** for any order entry associated with such an appraiser.



Caution: There is no way to “undo” this process if multiple files are marked as Paid by mistake. Any file(s) unintentionally marked as Paid will need to be changed from the order record(s) associated with the file(s).

MARKING INDIVIDUAL ORDERS AS PAID

Data pertaining to appraiser payments can be entered on a per-order basis from the **Appraiser Unpaid** page by using the **Mark as Paid** functionality. The following procedures detail how this is done.

1. To mark an order as Paid from the **Appraiser Unpaid** page, first locate the applicable record entry.
2. Next, Click **Mark as Paid** in the **Change Status** column of the record entry. The entry will expand.
3. Enter values in the **Check#** and **Amount** text boxes, and add information, if relevant, in the **Memo** text box. Click **Save**.

Note: Information added in the **Memo** text box will appear in the **Memo** column on the **Appraiser Paid** page in association with this same order record.

4. Order record entries for orders marked as Paid will move to the **Appraiser Paid** page, and a communication will be sent out to relevant parties.

ENTERING PAYMENT DATA FOR PAYMENT COVERING MULTIPLE ORDERS

Data pertaining to a payment that covers multiple orders can be entered from the **Appraiser Unpaid** page by using the **Pay Multi** functionality. The following procedures detail how this is done.

1. To enter payment data for multiple orders, first locate the applicable record entries.
2. Select each check box in the far-right column of the list associated with an applicable record. If you want to select all entries in a list view for this purpose, click the check box in the header row above the column.
3. Next, click **Pay Multi**, located just above the list and to the right of **Generate Invoice**.
4. The **Check#** and **Date** text boxes will appear, and you will see the total balance to be accounted for to right of the **Date** text box.
5. Enter the check number and adjust the date, if necessary, and then click **Save**.
6. The record entries lumped under this payment will no longer appear in the list. They will automatically move to the **Appraiser Paid** page.

Managing ACH transactions: the ACH Works integration and Pending ACH tab

Appraisal Scope offers an integration with ACH Works. ACH Works provides payment processing solutions using the national automated clearing house (ACH) for electronic funds transfers. The ACH Works integration allows AMCs to pay appraisers who provide their ACH information to Appraisal Scope via automatic deposit into an appraiser’s account. AMCs that would like to use the ACH Works integration should contact the Appraisal Scope support team.

PENDING ACH TAB

The **Pending ACH** page includes a list of records for an AMC's **ACH transactions**. Staff users can see the status of an ACH transaction in the **ACH Status** column of the list.

Users can also see any error codes associated with the transactions. When errors occur, the error codes can help staff users manage ACH payments within the ACH Works portal. Individual errors can be deleted by clicking the **X** icon, or the entire ACH log can be cleared by clicking **Clear ACH Errors** from the control options located on the right side of the page and atop the list.

EXPORTING ACH TRANSACTION DATA

The **Export** feature is most useful in cases where a staff user has refined their **ACH transaction** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located in the control options to the right of the page and atop the list, all data for the transactions appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the invoices in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list up through the **Status** column.

Appraiser Paid tab

The records for all orders that are in an Appraiser Paid status can be accessed on the **Appraiser Paid** page. The same general filtering and grouping options are available from the **Appraiser Paid** page as are available from the **Appraiser Unpaid** page. Lists viewed from the **Paid** page will have two columns that are not seen in lists on the **Appraiser Unpaid** page: **Memo** and **Check#**.

Information added in the **Memo** text box when an order is marked as paid will be available in the **Memo** column. The information is accessible by clicking the **Clipboard** icon.

The **Check#** column will display the check number associated with an **Appraiser Paid** order. If multiple payments were made to cover appraiser fees, the check number that will display will be for the check that covered the Balance Due amount. In the case of multiple payments, the **Clipboard** icon will appear, and transaction details will be accessible by clicking this icon.

Staff users will find totals for the **Client Fee**, **App Fee**, and **P/L Amount** columns beneath each group (if a user is grouping the records) and at the bottom of the list (or list page, if the list is spread over multiple pages). Appraisal Scope will provide a **Page Total** and a **Grand Total**. The **Page Total** will be the same as the **Grand Total** for one-page lists. For multi-page lists, the **Page Total** provides the total for the page, and the **Grand Total** provides the total for the entire list.

EXPORTING ORDER DATA—APPRAISER PAID

The **Export** feature is most useful in cases where a staff user has refined their **Order** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located just above the list and to the right of **Import Checks**, all data for the orders appearing in the list will be exported.

We must reiterate that *all* data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list up through the **Status** column.

Appraisers Statement tab

The **Appraisers Statement** tab allows staff users to manually generate CSV and/or PDF files pertaining to appraiser fees paid over a specific period of time. These files can be downloaded locally or delivered to a specific appraiser via email.

Note: Delivery of **Appraiser Paid** statements can be automated by enabling the **Generate Appraiser Daily Digest** setting, accessible by going to Settings > Options > Reporting > **Generate Appraiser Daily Digest**.

GENERATING AN APPRAISERS STATEMENT

1. From the **Appraisers Statement** page, choose the range of dates that you want the statement(s) to encompass, beginning in the **From (Paid Date)** and ending in the **To (Paid Date)** text boxes.
2. Insert any message to be included in the statement(s) in the **Message** text box.
3. If you want to generate statements for all appraisers on your platform-version over the date range you've selected, select **All Appraiser**. If you want to generate statements for specific appraisers over the date range, select **Specific Appraiser**.
4. If you've selected **Specific Appraiser**, the **Appraiser(s)** drop-down box will appear. Click the drop-down box and select the check box(es) associated with the appraiser(s) you want to generate-statements for.
5. To choose the document format(s) for your statement(s), click the **Output** drop-down box and choose **PDF**, **Excel**, or **Both**.
6. To choose whether to download or email the statement(s), click the **Deliver** drop-down box and choose **Download** or **Email**.
7. After making all selections, click **Generate Statement**.

Note: When multiple documents are generated, they will be available in a zipped (compressed) folder.

Managing accounts using the QuickBooks Desktop integration

AMCs that are using **QuickBooks** Desktop have the option to integrate this platform with their Appraisal Scope platform-version. To initiate this integration, a staff user should contact the Appraisal Scope support team.

The QuickBooks Desktop integration can be managed from the **QuickBooks** page under the **Accounting** tab. Staff users will find here the controls to setup an integration, configure the criteria used for QuickBooks sync, and perform QuickBooks syncs, and they will also find here a log of the actions related to the QuickBooks Desktop integration. Information related to these controls and more is provided in the following sections.

QuickBooks Web Connector

In order to initiate the QuickBooks Desktop integration, contact the Appraisal Scope support team. A member of support will generate a QWC file in order to enable installation of the QuickBooks Web Connector.

The QuickBooks Web Connector is a software application that will allow Appraisal Scope to exchange data with QuickBooks.



Caution: The connector must be installed and left running on a user's desktop to ensure that data passes freely between Appraisal Scope and QuickBooks.



The Web Connector controls the frequency with which QuickBooks pulls information that's been queued in Appraisal Scope. A data draw frequency of 5–10 minutes is recommended.

After the Web Connector has been installed and is running, the user can move on to configuring the sync settings.

Conceptual overview and the QuickBooks tab

QuickBooks Desktop version has its own terminology for identifying the objects that it requires to function normally. When it comes to the integration available on Appraisal Scope, object identifiers will tell QuickBooks what the pieces of information pulled from Appraisal Scope are, and then they will help determine where the information should go once pulled over.

The foundation for much of this process is laid by the team setting up the integration and is, therefore, outside the scope of this User Guide. There are steps that need to be taken in Appraisal Scope from the **QuickBooks** tab to finish setting up the integration, however, and generally speaking, it can be useful for staff users to have a conceptual understanding of the way QuickBooks and Appraisal Scope communicate. Understanding the concepts can help staff users better utilize the QuickBooks Desktop integration to manage accounts. The following information is intended to help users finish up the integration setup from the **QuickBooks** page and also help develop understanding of concepts.

QUICKBOOKS DESKTOP TERMINOLOGY AND APPRAISAL SCOPE EQUIVALENTS

The QuickBooks Desktop integration with Appraisal Scope relies partly on object identifiers to pull data from Appraisal Scope. We can see how the QuickBooks object identifiers roughly correspond to informational categories in Appraisal Scope with the following diagram. QuickBooks object identifiers are listed on the left side, Appraisal Scope referents are on the right.

• QB Customer	↔	client company
• QB Vendor	↔	Vendor (i.e., Appraiser)
• QB Invoice	↔	Client Fee
• QB Vendor Bill	↔	Appraiser Fee
• QB Client Payment	↔	Payments toward a Balance Due

This is not a comprehensive list of all QuickBooks object identifiers associated with the integration, but it can be helpful to have a general understanding of what these mean because they appear on the Appraisal Scope platform in association with the QuickBooks sync status indicator, which we will cover later in this section. Also, having a high-level conceptual understanding of the ways Appraisal Scope and QuickBooks are correlated for the purposes of passing data will be helpful as we move through the QuickBooks Desktop Integration section of the User Guide.

USER-CONTROLLED SETTINGS FOR QUICKBOOKS DESKTOP INTEGRATION

QuickBooks Settings

Income Account:

Cost of Goods Sold Account:

Account Receivable:

Account Payable:

Banking COA for Appraiser Payment:

This view shows the top part of the **QuickBooks Settings** panel on the **QuickBooks** tab page. The text boxes here equate to the QuickBooks chart of accounts. Inserting the names that you have used in your chart of accounts in these text boxes will ensure that the data QuickBooks pulls over from Appraisal Scope will appear in the right places in your QuickBooks Desktop interface.

Information is required for the first three text boxes. Information in the fourth will be necessary if you are going to use a separate Account Payable specifically for Appraisal Scope. If you are only using one account payable in QuickBooks, you can leave this field blank. Information in the fifth text box is required if you are using the ACH Works integration to pay Vendors in Appraisal Scope.

After you have filled in the chart of accounts–equivalent text boxes, you can move on to configuring the sync settings.

CONFIGURING USER-CONTROLLED SYNC SETTINGS

Sync Method: Invoice / Payment

Sync Invoice:
 On Completion On First Payment OR Completion

Sync CC Payments:
 On Off

Sync Check Payments:
 On Off

Sync Appraiser Checks From QB (Auto. Every Night):
 On Off

Sync 1099 for Vendors in QB:
 On Off

Create New Appraiser Profile on Update of Taxid:
 On Off

Reference Number:
 Use Ascope File # as Reference # in QB
 Remove postfix and prefix from Ascope File # and use it as Reference # in QB

This view shows the part of the **QuickBooks Settings** panel associated with sync settings.

The first setting option, the **Sync Invoice** setting, controls at what point the sync status indicator will be available to initiate an invoice sync (see "QuickBooks sync status indicator" section for more details). If **On Completion** is selected, then an Order must be complete before an invoice sync can be initiated. If **On First Payment OR Completion** is selected, then an invoice sync can be initiated when either the first payment or Order completion takes place.

The **Sync CC Payments** option, when **On**, instructs QuickBooks to pull credit card payment data when a sync is initiated.

The **Sync Check Payments** option, when **On**, instructs QuickBooks to pull data for client payments made by check when a sync is initiated.

The **Sync Appraiser Checks From QB (Auto. Every Night)** option, when **On**, instructs QuickBooks to automatically push data for appraisal fees paid by check over to Appraisal Scope each night.

The **Sync 1099 for Vendors in QB** option, when **On**, instructs QuickBooks to pull 1099s that appraisers have uploaded into Appraisal Scope when a sync is initiated.

The **Create New Appraiser Profile on Update of Taxid** option, when **On**, will instruct QuickBooks to create a new profile for an appraiser who has updated their Tax ID with Appraisal Scope. This will occur in cases where an appraiser profile already exists in QuickBooks for the appraiser.

Under **Reference Number**, the **Use Ascope File # as Reference # in QB** setting is set up by default for the integration. The setting just beneath this one is available for AMCs who have established a file numbering convention (file number convention configured from **Settings > File #**) that produces file numbers too long for QuickBooks to use in their entirety. If this is the case, QuickBooks will list a file number only until it reaches the maximum number of characters that QuickBooks allows, at which point it cuts the number off. When the **Remove postfix and prefix** setting is selected, QuickBooks will pull only the core part of the file number when it syncs, mitigating the truncation issue.

After you have configured all of the user-controlled settings, click **Save**.

QUICKBOOKS SYNC STATUS INDICATOR



The QuickBooks sync status indicator, seen above, displays to staff users the status of a sync that has been initiated. The color of the indicator will show what the QuickBooks sync status is. When it shows gray letters on a white background, as in the image under the section header above, then a sync has not taken place. If the indicator shows orange, then some of the information to be passed over to QuickBooks has synced. If the indicator shows green, then all information has synced.

The sync status indicator appears in multiple locations. From a client company profile (accessible by going to **Users > Client**), staff users will see the indicator on the **QB Sync** tab in the submenu of tabs there. From a vendor profile (accessible by going to **Users > Appraiser**), staff users will see the indicator also on the **QB Sync** tab in the submenu of tabs.

The **QuickBooks** sync status indicator also appears in a few locations under the **Appraisals** tab. The presence of the indicator under this tab, however, depends on certain factors. The first factor is related to the status of an order. The sync status indicator will always appear in association with orders accessible from **Appraisals > Completed**, or in other words, orders in a **Completed** status. For orders not yet completed, there is another factor to consider.

Whether the sync status indicator appears for orders not yet completed depends on whether or not the first option in the QuickBooks sync settings is set to **On First Payment OR Completion** (see the section *User-controlled settings for QuickBooks Desktop integration* on the previous page for more information). When this setting is chosen, the sync status indicator will appear when either the first payment is made or the order is completed, whichever comes first. In a case where a payment has been made on an order before it has been completed, the sync status indicator will appear in association with that order from **Appraisals > All**.

The status indicator will be visible from two places under the **All** tab. First, the sync status indicator will appear in association with each entry of the **Search** results list that corresponds to an order for which a payment has been made. And then the status indicator will also be available when a staff user clicks on one of these entries and opens the **Order Record** page. The sync status indicator will appear on the **Order Record** page in the submenu of tabs, on the **QB Sync** tab.

INITIATING A QUICKBOOKS SYNC

There are a couple more details to mention before we move into describing the methods that can be used to initiate a QuickBooks sync. When we are discussing syncing Appraisal Scope to QuickBooks through the integration, we are talking about situations where a profile or record hasn't yet been synced. In these cases, the QuickBooks sync status indicator will reflect an un-synced status (gray letters on a white background). Any time a sync status indicator shows orange or green, a sync is not necessary.

Also, in each instance where the sync status indicator appears, staff users can move their cursor over the indicator with their mouse and a dialog box will appear. The dialog box will display QuickBooks object identifiers (see the [QuickBooks Desktop terminology and Appraisal Scope equivalents](#) section for more information) related to the specific information that QuickBooks will be pulling from a particular location.

For instance, if a staff user accesses a client company or vendor profile and moves their cursor over the QuickBooks sync status indicator on the **QB Sync** tab there, QB Customer or QB Vendor will appear, respectively, in a dialog box. This means that initiating a sync from a client company or vendor profile will make client company or vendor information available for QuickBooks to pull in to start a customer or vendor file on the QuickBooks platform.

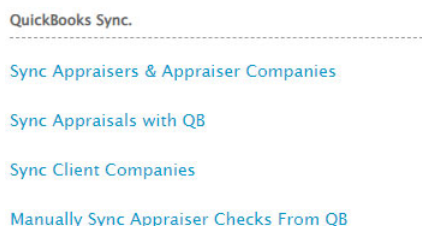
Note: If information for a specific client company and/or vendor has been passed over to QuickBooks previously, this information will not be passed over again. The only exception to this rule would be if the **Create New Appraiser Profile on Update of TaxID** option is **On** and the Appraisal Scope vendor profile is updated with that new ID (see the *User-controlled settings for QuickBooks Desktop Integration* section for details).

If a staff user moves their cursor over the sync status indicator associated with an order, they will see the QuickBooks objects that QuickBooks will be looking for if a sync is initiated from that location. This is the information that falls into the accounts receivable and accounts payable categories, such as the QB Invoice, QB Client Payment, and QB Vendor Bill objects.

Regardless of where the QuickBooks sync status indicator is encountered, clicking the indicator or the tab showing the indicator will initiate a QuickBooks sync. If the sync status indicator is clicked from a client company profile, a sync is initiated for the QB Customer information. If the indicator is clicked from a vendor profile, a sync is initiated for the QB Vendor information. And if the indicator is clicked from the **Search** results list under the **Appraisals** tab or from an order record, a sync is initiated for the information associated with accounts receivable and accounts payable.

Using the QuickBooks Sync. panel

Staff users can also initiate a QuickBooks sync from the **QuickBooks** page by using the options available from the **QuickBooks Sync.** panel on the left side of the page, beneath the **Save** and **Clear** buttons.



User Tip: It's recommended that the first three options on the QuickBooks Sync panel only be used when the QuickBooks Desktop Integration is first set up. Using these options as a regular means of syncing can cause errors. The **Manually Sync Appraiser Checks From QB** option may be used frequently, on the other hand, as a means to pull appraiser check data from QuickBooks over to Appraisal Scope.

The main difference between initiating a sync from this location vs. using the sync status indicator method is that syncs initiated here impact all relevant profiles or records in Appraisal Scope, rather than just the profile or record from which the sync is initiated.

If a staff user clicks **Sync Appraisers & Appraiser Companies**, Appraisal Scope will search through the vendor profiles on a platform-version and initiate a sync on any profiles that haven't yet been synced. If they click **Sync Appraisals with QB**, Appraisal Scope will search through all order records, find those for which a **QuickBooks** sync can be initiated, and initiate the sync in these cases. If they click **Sync Client Companies**, Appraisal Scope will search client company profiles to initiate a sync.

The **Manually Sync Appraiser Checks From QB** option is a little bit different. When this link is clicked, Appraisal Scope will pull data regarding check payments made to appraisers from **QuickBooks**. There is another option that AMCs can utilize to get this data, however. **The Sync Appraiser Checks From QB (Auto. Every Night)** setting, located on the **QuickBooks Settings** panel (see the *User-controlled settings for QuickBooks Desktop Integration* section for details), when turned on will perform this same sync action automatically on a nightly basis.

DATA SYNC FOR CHECK PAYMENTS TO APPRAISERS

Appraiser payments made by check represent the only instance with the QuickBooks Desktop integration that Appraisal Scope pulls data *from* QuickBooks. In all other instances, data goes the other direction, from Appraisal Scope to QuickBooks. This means that if an AMC is managing check payments to appraisers from Appraisal Scope and not QuickBooks (i.e., from the **Appraiser Unpaid** tab), that information does not go over to QuickBooks when a sync is initiated. If an AMC is using the ACH Works integration, though, and is paying Appraisers via ACH transaction, that information will flow to QuickBooks.

QUICKBOOKS ACTION STATUSES

We've been referring to initiating sync actions from Appraisal Scope throughout this section of the User Guide. In reality, though, this term as used here is largely conceptual. When a staff user initiates a sync from Appraisal Scope, they are actually telling Appraisal Scope to make the appropriate arrangements so that QuickBooks actions can take place at a scheduled time.

The QuickBooks queue can be thought of as a staging location for these QuickBooks actions. Most often the actions will entail QuickBooks retrieving information from Appraisal Scope, but in the case of appraiser payments made by check, the action staged would entail Appraisal Scope receiving appraiser check information from QuickBooks. What this all means is that when a staff user initiates a QuickBooks sync, the relevant actions subject to the sync will move to an In Queue status.

Note: The specifics as to when the information flow between QuickBooks and Appraisal Scope begins are established by the team setting up the integration, and so information pertaining to the timing of the data exchange is outside the scope of this User Guide.

When a staff user accesses the **QuickBooks** page, they will see a list of all the pending QuickBooks actions that are In Queue. If a user clicks the **Request Action** drop-down box, located just above the list, they will see a list of available actions. Any of these actions, when chosen, will filter the list, so that only QuickBooks actions reflecting the chosen action and in an In Queue status will appear in the list.

QuickBooks actions can also reflect Success or Error statuses. If a QuickBooks action associated with a sync ultimately leads to the successful transfer of data between Appraisal Scope and QuickBooks, then the action will move from In Queue to Success. If there is an error with a QuickBooks action that prevents the successful transfer of data between Appraisal Scope and QuickBooks, then the action will move from In Queue to Error.

A staff user can produce a list view of all QuickBooks actions that carry the Success or Error queues. To produce this list view, the user will click the **Request Status** drop-down box, located just above the list, and choose **Success** or **Error**.

Managing sales commissions: Commissions tab

The **Commissions** page gives staff users a location to manage AMC sales commissions. Along with list features similar to those available throughout the **Accounting** tab, lists viewed from the **Commissions** page will include the **Sales Person** and **Commission** columns. The **Sales Commission** list will also include **Group By** functionality, located to the left of the page and atop the list, that allows a staff user to group the order records by salesperson or by client company.

The **Sales Commission** list will track commissions for the salespeople that an AMC has setup in their platform-version. These settings are accessible from the **Staff** list under the **Staff** tab.

The **Sales Commission** list can be used to track commissions that are owed. Once a commission is paid, the associated record should be deleted. To delete a record, a staff user will first select from the far-right column the check box associated with the record to be deleted. Then, they will click **Delete**.

Exporting data—Sales Commission

The **Export** feature is most useful in cases where a staff user has refined their **Sales Commission** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located to the right of the page and atop the list, all data appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list.

Aging Balance tab

The **Aging Balance** page allows staff users to view a list of accounts that carry a balance that's past due by at least 30 days. The list shows the total balance in the **Balance** column, and then it organizes the balance into the columns **Current** (the portion of balance up to 30 days old), **Over 30** (the portion of balance past due by at least 30 days), **Over 60** (the portion of balance past due by at least 60 days), and **Over 90** (the portion of total balance past due by at least 90 days). The past-due calculation begins from the date when an order is completed.

Users can view aging balances associated with either accounts receivable or accounts payable by selecting **Account Receivable** or **Account Payable** from the top left of the page, just beneath the tab menu. A list showing accounts receivable can be searched by client company, and a list showing accounts payable can be searched by appraiser or appraiser company.

Exporting data—Aging Balance

The **Export** feature is most useful in cases where a staff user has refined their **Aging Balance** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located to the right of the page and atop the list, all data appearing in the list will be exported.

We must reiterate that *all* data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list.

Transaction Summary tab

The **Transaction Summary** page provides a searchable list of every payment transaction for every order throughout the history of an AMC's platform-version. Staff users will have the ability to broadly filter the list by transaction. Users can select **Account Receivable** or **Account Payable** from the **Transaction** options located at the top left side of the page, beneath the tab menu. This selection will narrow the list to records of transactions in one of those broad categories.

More filters can be applied through the **Search** functionality at the top of the page. Among options available, the list can be narrowed by client company or client user, Appraiser or Appraiser Company, and/or by date range of transactions.

Staff users will find totals for the **Credit** and **Debit** columns for accounts receivable, and for appraiser fees (**App Fee** column) at the bottom of each page of a **Transaction** list. Appraisal Scope will provide a **Page Total** and a **Grand Total**. The **Page Total** provides the total for the page, and the **Grand Total** provides the total for the entire list.

Exporting data—Transaction Summary

The **Export** feature is most useful in cases where a staff user has refined their **Transaction** list using the **Search** or **Group By** functionality. When a user clicks **Export**, located to the right of the page and atop the list, all data appearing in the list will be exported.

We must reiterate that all data will be exported, so if a list hasn't been refined, and the number of orders in the list span multiple pages, it may take a considerable amount of time to produce a spreadsheet, and the spreadsheet produced can be very large.

The **Export** feature will generate an Excel spreadsheet. The Excel file will be downloaded to a user's local device. The spreadsheet will include all data from the exported list.

CHAPTER 10. METRICS: TAB FUNCTIONALITY AND RELATED CONCEPTS

Introduction to the Metrics tab

The **Metrics** tab is accessible from the main tab menu at the top of the landing page. The **Metrics** tab allows staff users to create dashboard views using widgets that show graphic representations of the information users select. Staff users will access the **Metrics** page by clicking the **Metrics** tab in the main tab menu.

Creating Metrics dashboard

The Metrics dashboard is a staff user-specific feature of Appraisal Scope. Each user can create as many dashboards as they'd like and modify them by adding widgets.

Staff users will find their Metrics dashboards available to choose from by clicking the **Available Dashboards** drop-down arrow at the top left of the Metrics page. Users can also delete a dashboard by clicking **Delete Dashboard**, or change the name of a dashboard by clicking **Modify Dashboard**.

Adding widgets

To add a widget to a Metrics Dashboard, a user will first click **New Widget**. In the **Add a new widget to the current dashboard dialog box**, the user will then click the **Available Widgets** drop-down arrow. The **Available Widgets** drop-down list that appears will show all of the widget options available. Following are descriptions and configuration instructions for the available Metrics dashboard widgets.

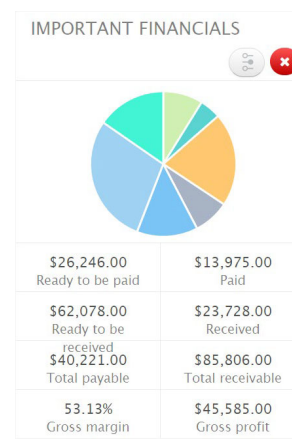
Financials Widget. Gives a view into critical financial information.

To configure your widget, choose:

Date Range – Click the **Date Range** drop-down arrow and choose how far back you want the data in your widget to go.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential**, **Commercial**, or **Residential and Commercial**.

Widget Name – Name your widget.



Performance Widget. Displays commonly used performance metrics.

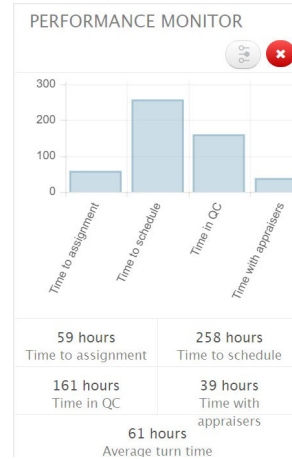
To configure your widget, choose:

Date Range – Click the **Date Range** drop-down arrow and choose how far back you want the data in your widget to go.

Exclude Weekends and Exclude Onholds – Select the check box associated with **Exclude Weekends** and/or **Exclude Onholds** if you want to exclude from the data returned weekends and time while orders are in **Onhold** status.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential, Commercial, or Residential and Commercial.**

Widget Name – Name your widget.



Scheduling Widget. Allows a Staff User to see a schedule of orders to manage.

To configure your widget, choose:

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential, Commercial, or Residential and Commercial.**

Widget Name – Name your widget.

The New Schedule widget displays a table with two columns of order counts for different time periods.

0 New orders (Today)	0 New orders (Yesterday)
0 New orders (This Week)	2 New orders (Last Week)
0 Completed orders (Today)	0 Completed orders (Yesterday)
0 Completed orders (This Week)	0 Completed orders (Last Week)
0 Scheduled orders (Today)	0 Scheduled orders (Tomorrow)
0 Scheduled orders (Yesterday)	0 Inspected orders (Today)
0 Inspected orders (Yesterday)	2 Due orders (Today)
0 Due orders (Tomorrow)	2 Due orders (This Week)

Heat Map Widget. Displays a geographical distribution of data related to appraisers, number of appraisals, and turn times.

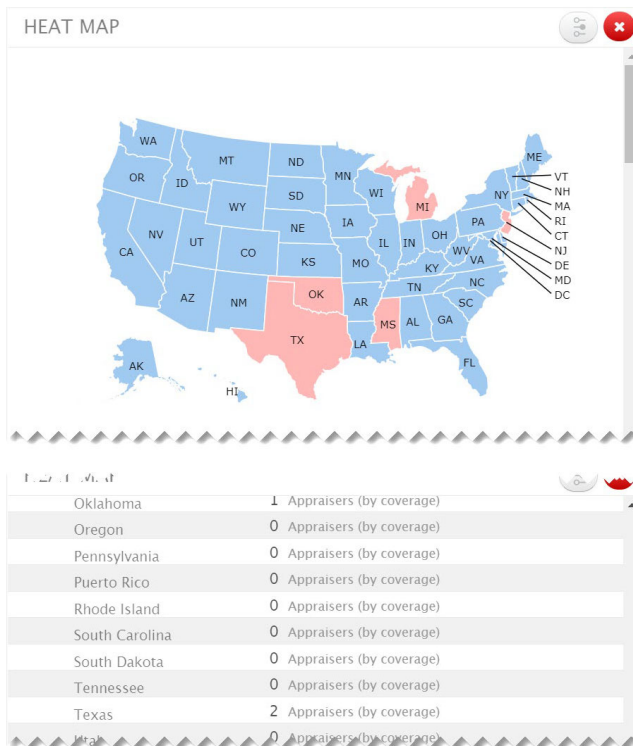
To configure your widget, choose:

Date Range – Click the **Date Range** drop-down arrow and choose how far back you want the data in your widget to go.

Exclude Weekends and Exclude Onholds – Select the check box associated with **Exclude Weekends** and/or **Exclude Onholds** if you want to exclude from the data returned weekends and time while orders are in **Onhold** status.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential**, **Commercial**, or **Residential and Commercial**.

Widget Name – Name your widget. At a glance the geographical distribution of your data.



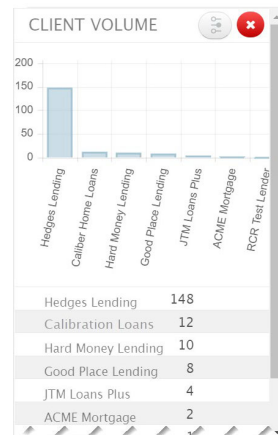
Client Volume Widget. Allows a Staff User to see which Client Companies have the highest volume.

To configure your widget, choose:

Date Range – Click the **Date Range** drop-down arrow and choose how far back you want the data in your widget to go.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential**, **Commercial**, or **Residential and Commercial**.

Widget Name – Name your widget.



Average Margin Widget. Allows Staff Users to get a quick look at margins for any job type they choose.

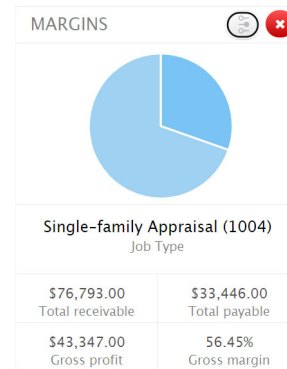
To configure your widget, choose:

Date Range – Click the **Date Range** drop-down arrow and choose how far back you want the data in your widget to go.

Select Job Types – Click the **Select Job Types** drop-down arrow and choose from the job types in your Appraisal Scope platform-version.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential**, **Commercial**, or **Residential and Commercial**.

Widget Name – Name your widget.



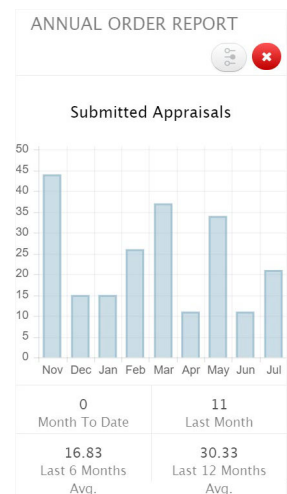
Annual Order Report Widget. Allows a Staff User to track order numbers over the previous 2 months, and to see 6-month and 1-year averages.

To configure your widget, choose:

Appraisal Based On – Click the **Appraisal Based On** drop-down arrow to choose whether you want the order numbers to reflect Submitted Appraisals, Completed Appraisals, or Invoiced Appraisals.

Order Type – Specify the types of orders you want to draw data from in the **Order Type** drop-down list: **Residential**, **Commercial**, or **Residential and Commercial**.

Widget Name – Name your widget.



Editing or removing widgets

To edit or delete a widget, the staff user will need to make sure that they've selected the relevant Metrics Dashboard first. A staff user can remove any widget from a dashboard by clicking the red **X** icon in the top-right corner of the widget.

Widgets can also be modified at any time. To modify the widget, a staff user will click the **Controls** icon, located just to the left of the **X**, and change the relevant setting. When finished, the user will click the icon again.

For more information, please call 866.774.3282.

Learn more at [corelogic.com](https://www.corelogic.com)

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