

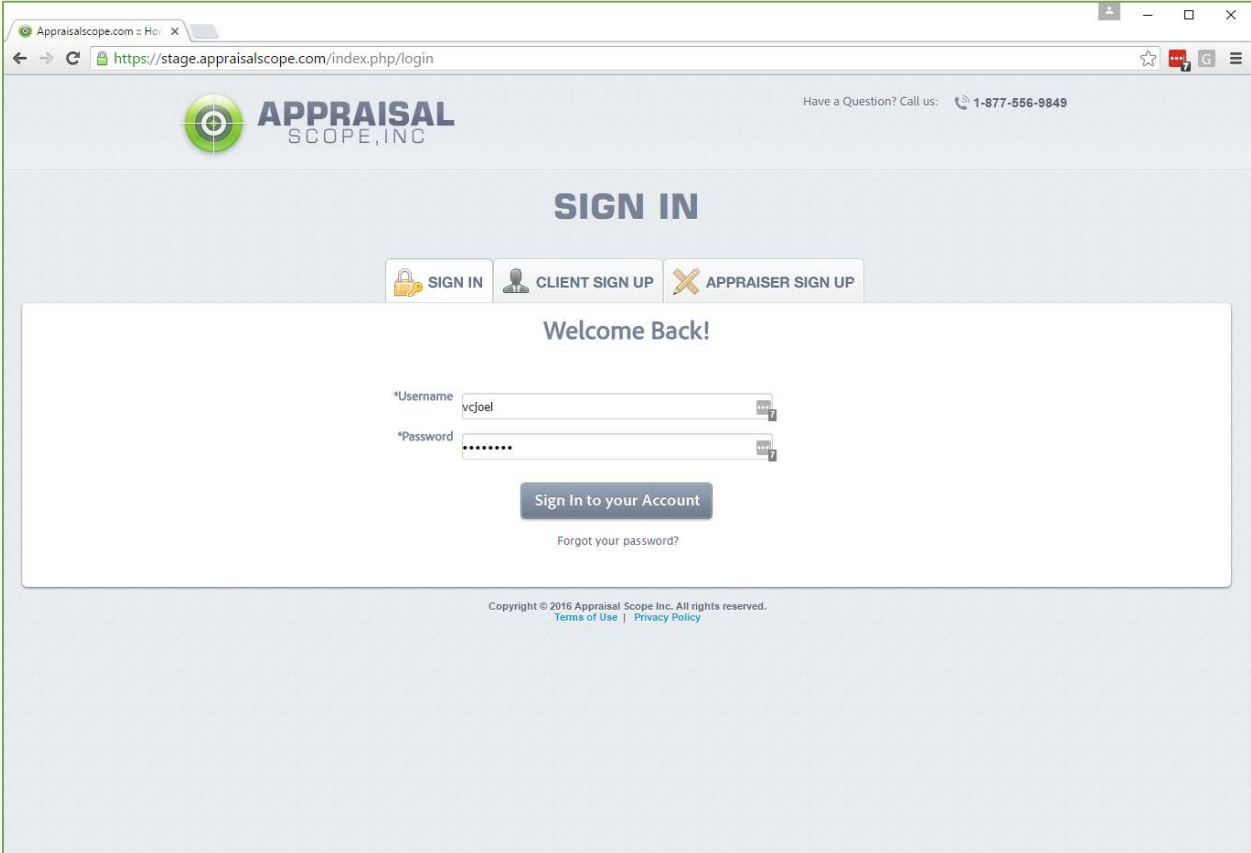
How to place orders as a client on Appraisal Scope

Revised: **05/13/2016** By: **PES**

Place an order on Appraisal Scope is a quick an easy process.

1. The AMC or bank you are working with will create a username and password for you on their custom Appraisal Scope platform. If you do not yet have your credentials, contact the AMC or bank in question to get them.
2. When you've received your credentials, **log in** to Appraisal Scope via the URL of the AMC you are working with using the credentials created for you. The URL will look something like this:

<http://exampleamc.appraisalscope.com>



The screenshot shows a web browser window with the URL <https://stage.appraisalscope.com/index.php/login>. The page features the Appraisal Scope logo and the text "SIGN IN". Below the logo, there are three buttons: "SIGN IN" (with a lock icon), "CLIENT SIGN UP" (with a person icon), and "APPRaiser SIGN UP" (with a crossed-out person icon). The main content area is titled "Welcome Back!" and contains a login form with the following fields:

- *Username:
- *Password:

Below the password field is a "Sign In to your Account" button and a "Forgot your password?" link. At the bottom of the page, there is a copyright notice: "Copyright © 2016 Appraisal Scope Inc. All rights reserved. Terms of Use | Privacy Policy".

3. After clicking **Sign in to your Account**, you'll be taken to main Appraisal Scope Dashboard for your user, displaying the different tabs that you'll use to manage the orders in your system.

4. Click the **NEW APPRAISAL** button in the upper-right corner of your Appraisal Scope screen.

The screenshot shows the 'Staging' client dashboard for Appraisal Scope. The top navigation bar includes 'Dashboard', 'Appraisals', 'Profile', and 'Contact Us'. A 'NEW APPRAISAL' button with a green plus icon and the text 'Request A New Appraisal' is highlighted with a green box. A green arrow points from the bottom of the box to the button. The dashboard displays a summary of appraisal counts: 14 Pending, 9 Completed, and 0 Revision. Below this is a table of appraisal orders with columns for No., File#, Borrower Name, Address, City, State, Loan#, Date Ordered, Due Date, Ordered For, Appraisal Form, Status, and Inspection Date. The table contains 9 rows of data.

No.	File#	Borrower Name	Address	City, State	Loan#	Date Ordered	Due Date	Ordered For	Appraisal Form	Status	Inspection Date
1.	EFG2613	Sally F Johnson	124 W Thatcher St	Edmond, OK	VC20160512-02	05/12/2016	05/17/2016	Jim Franklin	(1004) URAR Full Single Family + 1004MC	New	
2.	EFG2612	Sam Pain	21 W Edwards St	Edmond, OK	VC20160512-01	05/12/2016	05/22/2016	Jim Franklin	(1004) URAR Full Single Family FHA + 1004MC	New	
3.	EFG2549	Janice Johansen	2705 APPALOOSA TRL	EDMOND, OK	VC20160502-02	05/02/2016	05/07/2016	Jim Franklin	(1004) URAR Full Single Family + 1004MC	Assigned	
4.	EFG2548	Ethan Cromwell	2805 APPALOOSA TRL	EDMOND, OK	VC20160502-01	05/02/2016	05/07/2016	Jim Franklin	(1004) URAR Full Single Family + 1004MC	Assigned	
5.	EFG2535	Neil Smith	3313 Prairie Ave	Edmond, OK	VC20160429-02	04/29/2016	05/04/2016	Joel Baker	(1004) URAR Full Single Family + 1004MC	New	
6.	EFG2534	Cathy Martini	3021 Beverly Dr	Edmond, OK	VC20160429-01	04/29/2016	05/04/2016	Joel Baker	(1004) URAR Full Single Family + 1004MC	New	
7.	EFG2532	Julie Brown	1704 Magnolia Ln	Edmond, OK	VC20160329-01	04/29/2016	05/04/2016	Sally Walker	(1004) Update/Final	On Hold	
8.	EFG2419	Greg Gallows	1704 Magnolia Ln	Edmond, OK	VC20160419-01	04/19/2016	04/24/2016	Jim Franklin	(1004) URAR Full Single Family + 1004MC	New	
9.	EFG2303	Vicky Cauthen	21 W Edwards St	Edmond, OK	VC20160412-	04/12/2016		Sally Walker	(1004) URAR +	New	

NOTE: The order form will display. Many of the fields in the order form are customized by the AMC or bank you are working with, and as such some fields may be required or there may be additional fields displayed that are not depicted in these screenshots.

5. Complete the **Assignment Information** section of the order form, filling in as much information as you can for the order. You may add additional job types to this order by clicking the **Click to Add Additional Form** link within the red callout box.

The screenshot shows the 'Request a New Appraisal' form in the Appraisal Scope system. The form is titled 'REQUEST A NEW APPRAISAL' and is divided into two main sections: 'Assignment Information' and 'Appraisal Form'. The 'Assignment Information' section includes fields for 'Rush Order', 'Due Date' (05-17-2016), 'Client displayed on report:' (VC Bank of Oklahoma), 'Loan Officer' (Jim Franklin), 'Notify Processors' (None), 'Loan#' (VC20160512-02), 'Loan Type' (Purchase), and 'Property View Type' (Residential). The 'Appraisal Form' section includes 'Submitted By' (Joel Baker), 'Appraisal Form' ((1004) URAR Full Single Family + 1004MC), and a red callout box with the link 'Click to Add Additional Form'. There is also a 'Need Help?' link. The top of the page shows a navigation bar with 'Dashboard', 'Appraisals', 'Profile', and 'Contact Us' links, and a status bar with 'Welcome Joel', 'NEW APPRAISAL', and 'LOGOUT' buttons. A search bar is located on the left side of the form.

Depending on the AMC or bank you are doing business with, you may need to select a different **Client displayed on report**. Select the **Loan Officer**, then add any additional processors you wish to be notified about this order from the **Notify Processors** drop-down list. Fill in the remaining details about the loan and property, then proceed to the next section.

NOTE: If your loan type is a Purchase, the AMC or bank that you're working with may have configured Appraisal Scope to prompt you for a contract. If so, you'll be asked to select the contract file on your computer and upload it.

- In the **Property Information** section, enter the address of the subject property. If the AMC or bank you're working with has enabled USPS address verification, you'll need to select the appropriate property match from the list of results that displays as you begin typing the address.

The screenshot shows the Appraisal Scope client dashboard. The 'Property Information' section is active, with 'Address 1' containing '124 W Thatcher St, Edmond, OK, United States'. A dropdown menu is open below the address field, listing several suggestions: '124 W Thatcher St, Edmond, OK, United States', '124 W Thatch Palm Cir, Jupiter, FL, United States', '124 W Thatcher Ln Lincoln, NE, United States', '124 East Thatcher Street Edmond, OK, United States', and '124 Thaten Drive Wichita Falls, TX, United States'. A green arrow points to the first suggestion, which is highlighted with a green box. Other fields include 'Purchase Price (\$)', 'Property View Type' (Residential), 'Address 2', 'City', 'County', 'Legal', 'Document Upload' (Select File), 'Appraisal Form Fee (\$)' (400.00), and 'Inspection Contacts and Access Information' (Occupancy: Owner, Borrower, Co-Borrower, Owner, Realtor/Other).

- Next, use the **Document Upload** feature to attach any supporting documents that may be relevant for the order, picking the appropriate choice from the **Document Type** drop-down to select what type of document you are attaching.

The screenshot shows the 'Document Upload' dialog box. The dialog box has a title bar that says 'Please select the type of document you're uploading.' and a close button (X). The 'Document Type' dropdown is set to 'Other'. There are 'Submit' and 'Cancel' buttons at the bottom of the dialog box. Below the dialog box, a file named 'Warranty Deed.pdf' is shown with a 'Cancel' button next to it.

- The **Appraisal Form Fee** will reflect the AMC's fee for providing management service for this order.

9. In the **Inspection Contacts and Access Information** section, fill in critical contact details for each party to this order.

The screenshot shows a web browser window with the URL <https://stage.appraisalscope.com/index.php/client/clientdashboard#RequestNewAppraisal>. The page title is "Appraisal Form Fee (\$)" and "Inspection Contacts and Access Information". The form contains the following fields and elements:

- Appraisal Form Fee (\$): 400.00
- Occupancy: Owner
- Tabbed interface: Borrower (selected), Co-Borrower, Owner, Realtor/Other
- Borrower's First Name: Sally
- Last Name: Johnson
- Work #: 405-555-0101
- MI: F
- Borrower Home #: 405-555-1212
- Cell #: 405-555-5555
- Mail Hard Copy to Borrower:
- Enter Borrower's Email To Expedite Scheduling: DrivingMrsSally@yahoo.com
- Who is the best person to contact?: Borrower
- Additional Comments/Instructions: Owner has pets on property.
- Buttons: Submit, Cancel, Reset

For each party (Borrower, Co-Borrower, etc...) you'll need to click the heading and the fields below will update to reflect details for that party. Fill out any that you have.

10. From the **Who is the best person to contact** drop-down, select the party to the order that is most appropriate to contact regarding scheduling the inspection or questions about the property.
11. Add any **Additional Comments/Instructions**, then click **Submit**.

12. Depending on which payment options have been enabled for your company by the AMC or bank you are working for, you will be presented with your choices for how to pay for this order.

The screenshot shows a web browser window with the URL <https://stage.appraisalscope.com/index.php/client/clientdashboard#RequestNewAppraisal>. The page title is "Staging" and it says "Welcome Joel". There are navigation tabs for "Dashboard", "Appraisals", "Profile", and "Contact Us". A summary bar shows: 22 All, 15 Pending, 8 Completed, 0 Cancelled, 0 Revision. Below this is a search section with fields for Name, Address, Loan#, and Ordered Date, along with "Advanced Search" and "Search" buttons. The main form is titled "Secure Online Appraisal Payment" and includes sections for "Order Information" (Client: VC Bank of Oklahoma, Borrower Name: Sally F Johnson, Address: 124 W Thatcher St, Edmond, OK, 73003, Total: USD 400.00), "Payment Information" (Pay by: Credit Card, Bank Account, Send Payment Request To Your Customer, Invoice, Split Payment, Partial Payment), "Billing Information" (Change Billing Address, Name: Sally Johnson, Address: 124 W Thatcher St, Edmond, OK, 73003, Phone: 405-555-1212, Email: DrivingMrsSally@yahoo.com), and "Credit Card Information" (Card Number, Expiration Date, Card Code). There is a checkbox for "Payment Disclosure Terms and Conditions" and "Submit" and "Cancel" buttons at the bottom.

Select your preferred **Pay by** method using the appropriate radio button, fill in your **billing Information** as appropriate, and agree to the **Payment Disclosure Terms and Conditions** if required.

13. Click **Submit** or **Confirm** according to your payment method.

Once your order has been placed, the **Order Details** screen will display. Your order has now been sent to the AMC or bank you're working with for assignment to an appraiser.