



AD Appraisal Center

User Guide for Clients

Revised 8/10/2023

Powered by

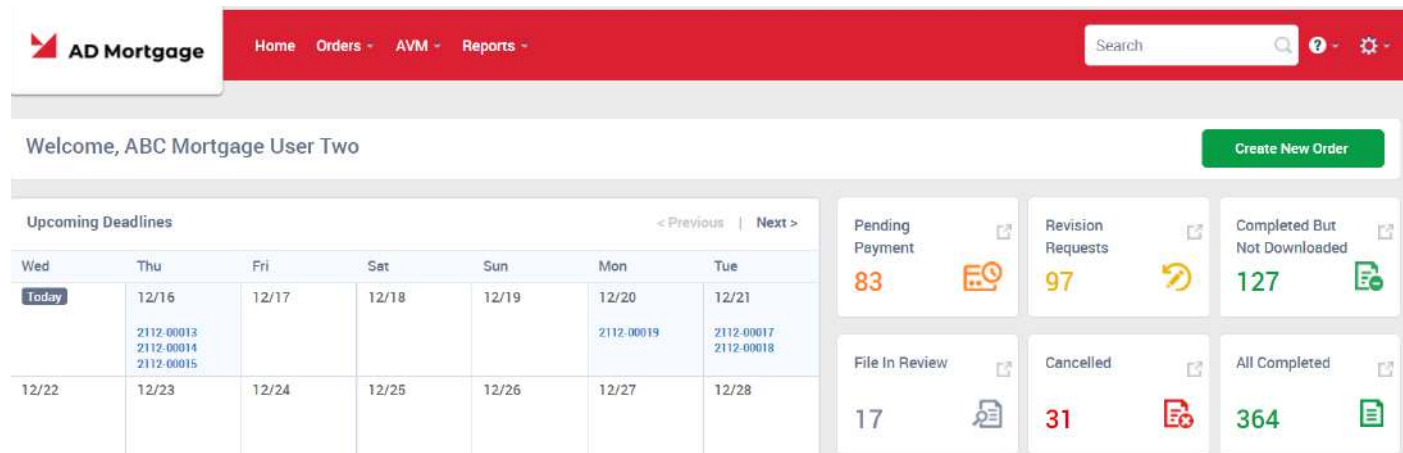


Table of Contents

AD Appraisal Center Home Screen.....	3
Appraisals.....	5
Create New Order	5
Search for an Order	9
Add a Supporting Document to an Order	10
Add a Comment to an Order	11
Cancel an Order.....	12
Duplicate an Order	12
Modify Users for an Order	13
See Order History.....	13
Retrieve an Appraisal Report	14
Request an Appraisal Revision	15
Order a 1004D.....	16
Email Appraisal Report(s).....	17
Perform a Final Appraisal Review.....	18
Send Report(s) to Borrower	18
Reporting	19
Ad-hoc Appraisal Report	19
Billing	20
View Invoice	20
Make Payment	20
User Profile	21
Add New Users (Master Users Only).....	21
Edit Company Users (Master Users Only)	23
Deactivate Company Users (Master Users Only)	24
Change Profile Information	25
Change Password	25
Support	26
View Knowledge Base	26
Open a Support Ticket.....	26
Give us a Call	26

AD Appraisal Center Home Screen

The Home Screen or Client/Lender Dashboard provides users with access to important information, every time they log into AD Appraisal Center. The Dashboard provides an overview of all orders in the system. Users can quickly Create Orders, Search for Orders and View their Active Orders from the Dashboard.



The dashboard features a red navigation bar with the AD Mortgage logo, menu items (Home, Orders, AVM, Reports), a search bar, and utility icons. Below the navigation bar, a welcome message reads "Welcome, ABC Mortgage User Two" next to a "Create New Order" button. The main content area is divided into two sections:

- Upcoming Deadlines:** A calendar view showing dates from Wednesday to Tuesday. The "Today" date (Wednesday) is highlighted. Orders are listed under specific dates:

Wed	Thu	Fri	Sat	Sun	Mon	Tue
Today	12/16 2112-00013 2112-00014 2112-00015	12/17	12/18	12/19	12/20 2112-00019	12/21 2112-00017 2112-00018
12/22	12/23	12/24	12/25	12/26	12/27	12/28
- Summary Cards:** A grid of six cards showing order counts with icons:
 - Pending Payment: 83
 - Revision Requests: 97
 - Completed But Not Downloaded: 127
 - File In Review: 17
 - Cancelled: 31
 - All Completed: 364

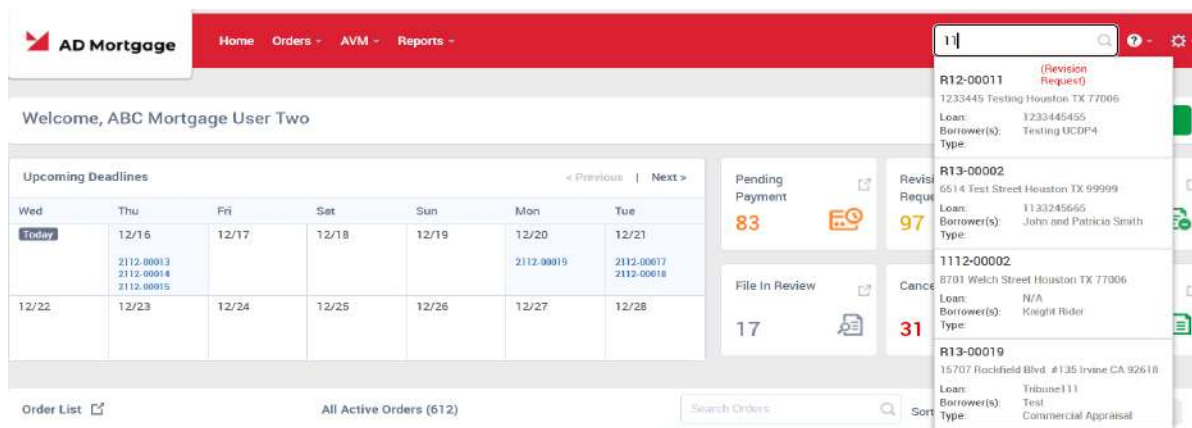
Users can quickly track appraisal orders by clicking on the status under the **Active Orders** section on the left side of the screen. By default, All Active Orders are displayed on the right side of the screen. The Upcoming Deadlines calendar lets users stay on top of their orders by highlighting orders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

Upcoming Deadlines							< Previous Next >
Wed	Thu	Fri	Sat	Sun	Mon	Tue	
Today	12/16 2112-00013 2112-00014 2112-00015	12/17	12/18	12/19	12/20 2112-00019	12/21 2112-00017 2112-00018	
12/22	12/23	12/24	12/25	12/26	12/27	12/28	

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

Quick Stats	Order Details	People	Dates	Item(s)	Status
All Active Orders 612	2112-00019	Ordered By/Loan Officer: N/A	Ordered: 12/09/2021 8:59 PM Due: 12/20/2021 Assigned: 12/09/2021 9:01 PM	1004 Conventional	Assigned To Vendor
Rush Orders 39	2099 Willowbrook Mall Houston TX 77070 County: Texas Type: Residential Appraisal Loan #: n/a Borrower(s): John Wik				
Orders Past Due 415	2112-00018	Ordered By/Loan Officer: N/A	Ordered: 12/09/2021 8:58 PM Due: 12/21/2021 Assigned: 12/09/2021 9:01 PM	1004 Conventional	Assigned To Vendor
Orders Due Today 0	2099 Willowbrook Mall Houston TX 77070 County: Texas Type: Residential Appraisal Loan #: n/a Borrower(s): Mr. Anderson 2				
Inspection Scheduled 14	2112-00017	Ordered By/Loan Officer: N/A	Ordered: 12/09/2021 8:55 PM Due: 12/21/2021 Assigned: 12/09/2021 9:02 PM	1004 Conventional	Assigned To Vendor
Orders On HOLD 6	2299 Willowbrook Mall Houston TX 77070 County: Texas Type: Residential Appraisal Loan #: n/a Borrower(s): James Bond 007				
Bid(s) Awaiting Approval 1					

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



The screenshot shows the AD Mortgage web application interface. At the top, there is a navigation bar with the AD Mortgage logo and menu items: Home, Orders, AVM, and Reports. Below the navigation bar, a welcome message reads "Welcome, ABC Mortgage User Two". The main content area features an "Upcoming Deadlines" calendar with columns for days of the week and dates from 12/16 to 12/28. To the right of the calendar are three summary cards: "Pending Payment" with a value of 83, "Revis Reque" with a value of 97, and "File In Review" with a value of 17. A search dropdown menu is open on the right side, displaying a list of search results with details such as order number, address, loan number, borrower name, and order type. The search bar at the top right contains the number "11".

Appraisals

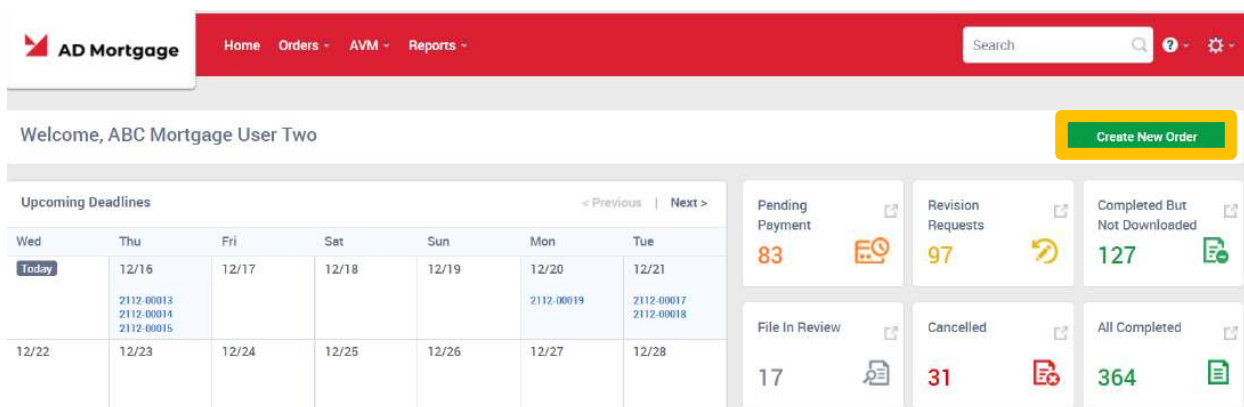
Create New Order

A lender must obtain borrower's intent to proceed prior to ordering the appraisal. Intent to proceed is included with initial disclosure documents.

NOTE: Borrower may not provide intent to proceed without being provided initial Loan Estimate.

To **Create an Appraisal Order**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click **Create New Order** on the Home Page.



Wed	Thu	Fri	Sat	Sun	Mon	Tue
Today	12/16 2112-00013 2112-00014 2112-00015	12/17	12/18	12/19	12/20 2112-00019	12/21 2112-00017 2112-00018
12/22	12/23	12/24	12/25	12/26	12/27	12/28

Pending Payment 83	Revision Requests 97	Completed But Not Downloaded 127
File In Review 17	Cancelled 31	All Completed 364

- 3) Select Order Type (Residential).
- 4) Fill out the fields on the order form. For Residential Orders, you may import loan data from a **Fannie Mae 3.2 loan** file to populate the relevant fields.
 - a. If using Fannie Mae 3.2 file, please verify that the loan number is the same A&D Mortgage LNID number.

NEW ORDER REQUEST

Fannie Mae 3.2 or iLAD 3.4 File Import (Use this section to import loan data from file)

Select File [?] Choose File No file chosen Import Loan File Data

Order Details

<p>Client (required) <input type="text" value="Test Broker"/></p> <p>Branch <input type="text" value="Select One"/></p> <p>Transaction Type (required) <input type="text" value="Select One"/></p> <p>Loan Number (required) <input type="text" value=""/></p> <p>FHA/USDA Case Number <input type="text" value=""/></p>	<p><input checked="" type="checkbox"/> Is Lender Different? [?] (required)</p> <p>Lender/Client on Report <input type="text" value="A&D Mortgage, LLC"/></p> <p>Loan Type (required) <input type="text" value="Select One"/></p> <p>Priority <input type="text" value="Normal"/></p>
--	--

Borrower Information

<p>Borrower (and Co-Borrower) (required) <input type="text" value=""/></p> <p>Borrower Email (required) <input type="text" value=""/></p> <p>Borrower Work Phone <input type="text" value=""/></p>	<p>Borrower Phone (required) <input type="text" value=""/></p> <p>Borrower Cell Phone <input type="text" value=""/></p>
--	---

Property Details

<p>Property Type (required) <input type="text" value="Select One"/></p> <p>Property Address (required) <input type="text" value=""/></p> <p>Property City (required) <input type="text" value=""/></p> <p>Legal Desc./ Tax ID Number <input type="text" value=""/></p> <p>Occupancy Type <input type="text" value="Select One"/></p>	<p>Property State (required) <input type="text" value="Select One"/></p>	<p>Property Zip (required) <input type="text" value=""/></p>
--	--	--

Access Information Section

Contact Person

Other Access Instructions

- a. For a refinance loan the contact person should be the Borrower.
- b. For a purchase loan select the point of contact (Contact Person) with Agent or Other.

Access Information Section

Contact Person

Select Contact Person ▼

- Select Contact Person
- Borrower
- Agent
- Other

c. Place Agent or Other's information under the Agent Information.

Agent Information

Agent Name	Agent Email
<input type="text"/>	<input type="text"/>
Agent Phone	Agent Work Phone
<input type="text"/>	<input type="text"/>
Agent Cell Phone	
<input type="text"/>	

Appraisal Information

Product (required)
- Select One - ▼ ⓘ

Appraisal Fee: \$0

UAD Report Needed ⓘ

Additional Item 1
- Select One - ▼ ⓘ

Additional Item 2
- Select One - ▼ ⓘ

Additional Item 3
- Select One - ▼ ⓘ

Sales Price:

Client Details

<p>Ordered By/Loan Officer <input type="text" value="- Select One -"/> ⓘ</p> <p>Loan Processor <input type="text" value="- Select One -"/> ⓘ</p> <p>Addl. Processor/Assistant <input type="text" value="- Select One -"/> ⓘ</p> <p>Additional Client Email(s) <input type="text"/></p>	<p>Orderer Phone <input type="text"/></p> <p>Addl. Processor/Assistant <input type="text" value="- Select One -"/> ⓘ</p>
--	--

Other Details

Was an appraisal previously ordered for this property with us? ⓘ

<p>Tracking Number <input type="text"/></p>	<p>Vendor File Number <input type="text"/></p>
--	---

Client Comments

Do you wish to provide supporting documents for this order? ⓘ

Yes No

6) If payment is being made by broker or the borrower has provided and signed the Credit Card Authorization form. A note will need to be placed in the comment section as following:

"Please send the secured payment link to me (your email address). Thank you."

a. Not leaving a comment, the payment link will be sent to the borrower from the AMC by selecting both buttons in the confirmation of the order.

7) If uploading any [supporting documents](#) for the order, select Yes.

a. If no documents are required, then select No.

CONFIRM NEW APPRAISAL DETAILS ?

Verify the order details below and click "Confirm and Create Order" to place the order.

Order Details			
Order Type	Residential Appraisal		
Client	!!! Test Broker	Is Lender Different	True
Lender on Report	A&D Mortgage, LLC		
Transaction Type	Refinance		
Loan Type	Conventional		
Loan Number	1234567		
FHA/USDA Case Number	N/A		
Priority	Normal		

9) Per 6.a, select both buttons for payment link to be sent to borrower from AMC.

Payment Information

Choose your payment method

Credit Card

Payment Options:

Send a payment request to the borrower.

Go Back

10) Click Confirm and Create Order to save the order in the system.

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

Search for an Order

To **Search for an Order**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click **Search Orders** on the Home Page.
- 3) Filter your results by selecting any of filter criteria available on the top of your screen.

The Keyword field allows you to search by the Appraisal Number, Borrower Name, Property Address, Vendor File Number, Tracking Number, Loan Number, County Name and Branch Name.

- 4) Click **Apply Filter** to search the system. Results are returned in a grid format.
- 5) Orders highlighted in Red are orders for which a revision has been requested.
- 6) Click the **Order Number** (e.g. R15-00000) to view details for the appraisal.

Add a Supporting Document to an Order

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

To **Add a Document to an Order**, follow the steps below:

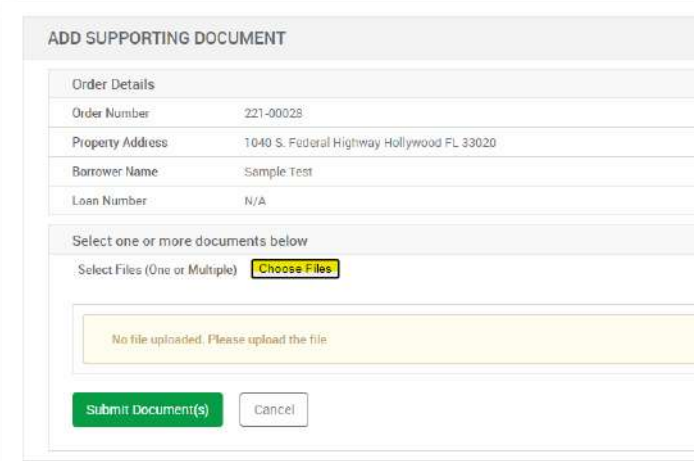
- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to add the document.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).



Reports(s)		
Report Type	File Name	Submitted On
1004 - Single Family	N/A	
UAD XML Report	N/A	
Invoice	View/Print	

Other Supporting Documents + Add Document

No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order



ADD SUPPORTING DOCUMENT

Order Details

Order Number	221-00028
Property Address	1040 S. Federal Highway Hollywood FL 33020
Borrower Name	Sample Test
Loan Number	N/A

Select one or more documents below

Select Files (One or Multiple) Choose Files

No file uploaded. Please upload the file

Submit Document(s) Cancel

- 6) Select the document type and browse your computer for the file you want to upload.
- 7) Click the **Submit Document** to add the document to the selected Appraisal.

Note: Uploaded documents can only be deleted by the System Administrator.

Add a Comment to an Order

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

To **Add a Comment to an Appraisal**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order in which you want to add the comment.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Scroll down to the **Comments** section.
- 5) Click the **Add Comment** button on the right side of your screen.



- 6) On the add comment screen, enter the comment in the space provided.
- 7) Click the **Add Comment** button to save the comment and return to the appraisal screen.

ADD COMMENT

Order Details	
Order Number	2112-00019
Property Address	2099 Willowbrook Mall Houston TX 77070
Borrower Name	John Wik
Loan Number	n/a

Comment Details

Common Response Append Common Response to the text below

Select from list or type below ?

Comment Type your text here

Add Comment
Cancel

Cancel an Order

To **Cancel an Order**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order which you want to cancel.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Click on the **Request Cancellation** option.
- 6) Provide a Cancellation Reason in the space provided.
- 7) Click on the **Send Request** button to cancel the order.
- 8) The system administrator will be informed of your request and can then cancel the appraisal.

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

Duplicate an Order

If you wish to order additional reports for the same property, you have the ability to quickly duplicate an order.

To **Duplicate an Order**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order which you want to Duplicate.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Click on the **Duplicate This Order** option.
- 6) Select the Appraisal Type, Transaction Type and specify a Due Date.
- 7) Click on the **Duplicate This Order** button to place the order.
- 8) A new order will be created in the system.

Modify Users for an Order

You can also amend the list of users assigned to a particular order.

To **modify users for an order**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order which you want to amend users for.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Click on the **Modify Users for Order** option.
- 6) Amend the Ordered By, Loan processor and Addl. Processor/ Assistant fields where necessary.
- 7) Click submit to save changes.

See Order History

You can see the history of an order along with timestamps for all logged events pertaining to the order.

To **see order history**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click the “See order history” link on top of the screen beside the order number.
- 5) A pop-out screen will show the order history details.
- 6) Click “Hide order history” once you have reviewed the details to close the pop-out.

Retrieve an Appraisal Report

If you want to **Retrieve an Appraisal Report** for a completed order, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to retrieve the appraisal report.
- 3) You can also click on the **Completed** option on the Home Page to view completed orders for which reports are available.



Dashboard Summary:

- Welcome, Sample Broker
- Create New Order
- Upcoming Deadlines: Calendar view from Sat 1/23 to Fri 1/28.
- Pending Payment: 0
- Revision Requests: 1
- Completed But Not Downloaded: 3
- File In Review: 0
- Cancelled: 10
- All Completed: 3

- 4) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 5) Scroll down to the **“Report(s)”** section to view submitted reports.

Reports(s)			Download All
Report Type	File Name	Submitted On	
1004 - Single Family	Bronfman(K2-120704)-V4.pdf	1/22/2022 12:52:49 PM	
UAD XML Report	Bronfman(K2-120704)-V4.xml (GET PDF FROM XML)	1/22/2022 12:52:49 PM	
AIR Compliance Certificate	View/Print		
Invoice	View/Print		

- 6) Click on the file name to download the report.
- 7) Save the report to your local disk by right-clicking on the document and clicking “Save Link As”.

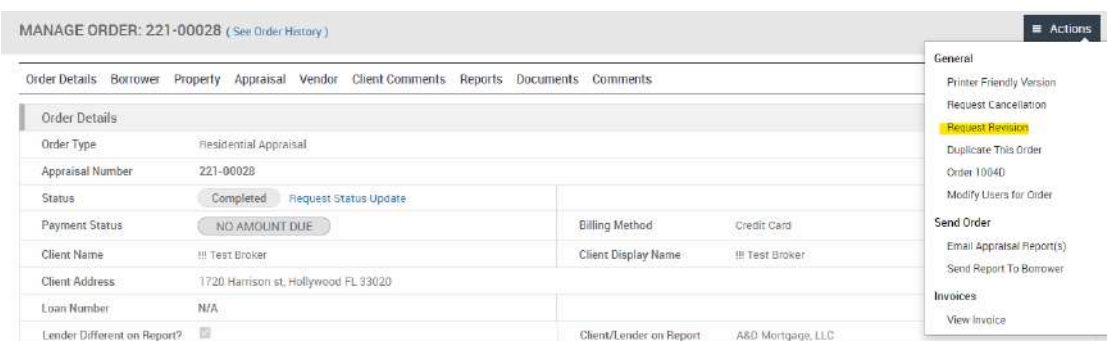
Note: This option is only available for Appraisals that have been completed and the report has been released.

Request an Appraisal Revision

If the Clients/Branches/Departments are not satisfied with the **Appraisal Report**, they may request a revision to the appraisal report.

To **Request a Revision**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to request a revision.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Click on **Request Revision** option.



MANAGE ORDER: 221-00028 (See Order History)

Order Details Borrower Property Appraisal Vendor Client Comments Reports Documents Comments

Order Details

Order Type Residential Appraisal

Appraisal Number 221-00028

Status **Completed** Request Status Update

Payment Status **NO AMOUNT DUE** Billing Method Credit Card

Client Name !!! Test Broker Client Display Name !!! Test Broker

Client Address 1720 Harrison st, Hollywood FL 33020

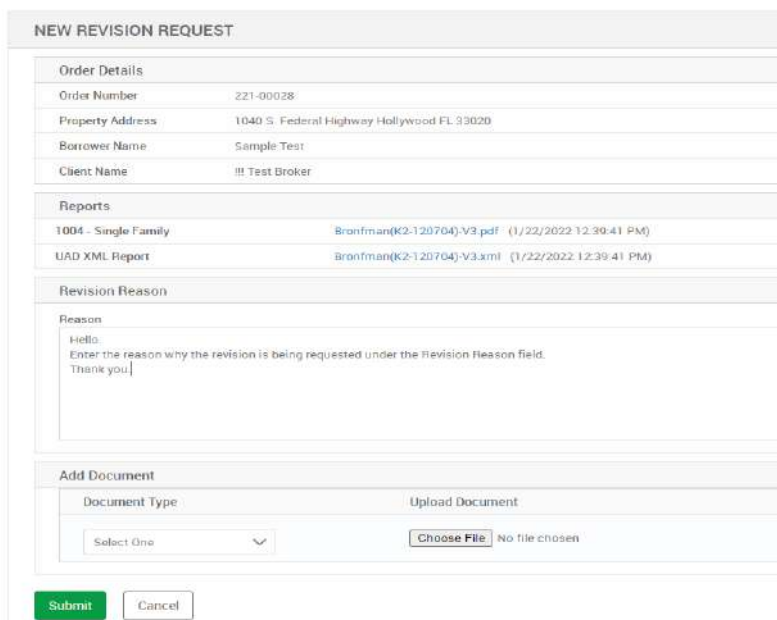
Loan Number N/A

Lender Different on Report? Client/Lender on Report A&D Mortgage, LLC

Actions

- General
- Printer Friendly Version
- Request Cancellation
- Request Revision**
- Duplicate This Order
- Order 10040
- Modify Users for Order
- Send Order
- Email Appraisal Report(s)
- Send Report To Borrower
- Invoices
- View Invoice

- 6) Enter the reason why the revision is being requested under the Revision Reason field.



NEW REVISION REQUEST

Order Details

Order Number 221-00028

Property Address 1040 S. Federal Highway Hollywood FL 33020

Borrower Name Sample Test

Client Name !!! Test Broker

Reports

1004 - Single Family Bronfman(K2-120704)-V3.pdf (1/22/2022 12:39:41 PM)

UAD XML Report Bronfman(K2-120704)-V3.xml (1/22/2022 12:39:41 PM)

Revision Reason

Reason

Hello,
Enter the reason why the revision is being requested under the Revision Reason field.
Thank you.]

Add Document

Document Type Upload Document

Select One Choose File No file chosen

Submit Cancel

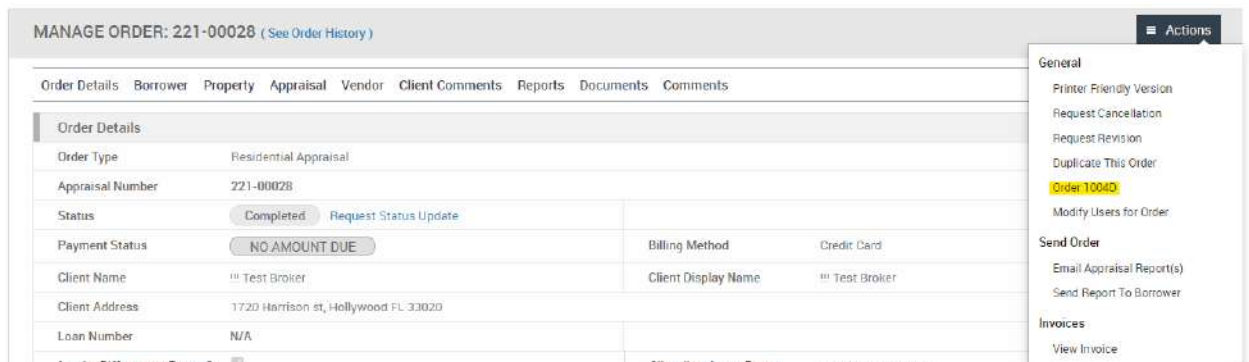
- Click on the **Submit** button. The system administrator will be informed of the revision request.

Note: The status will be updated from Completed to Revision Requested by Client (Revision Requested) and the reason of the request can be viewed in the Comment section.

Order a 1004D

If you want to **order a 1004D** – Completion Report with your Appraisal Order, follow the steps below:

- Log on to your AD Appraisal Center account.
- Search** for the Appraisal Order for which you want to Order a 1004D.
- Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- Click on the **Actions** button on the top right of your screen to reveal options.



The screenshot shows the 'MANAGE ORDER: 221-00028' interface. The 'Order Details' section includes:

Order Type	Residential Appraisal		
Appraisal Number	221-00028		
Status	Completed	Request Status Update	
Payment Status	NO AMOUNT DUE	Billing Method	Credit Card
Client Name	Test Broker	Client Display Name	Test Broker
Client Address	1720 Harrison St, Hollywood FL 33020		
Loan Number	N/A		

The 'Actions' dropdown menu is open, showing the following options:

- General
 - Printer Friendly Version
 - Request Cancellation
 - Request Revision
 - Duplicate This Order
 - Order 1004D**
 - Modify Users for Order
- Send Order
 - Email Appraisal Report(s)
 - Send Report To Borrower
- Invoices
 - View Invoice

- Click on **Order 1004D** option.
- Select the Transaction Type and Report Type and specify a Due Date.

DUPLICATE THIS ORDER			
Appraisal Number	221-00028		
Property Address	1040 S. Federal Highway Hollywood FL 33020		
Borrower Name	Sample Test	Loan Number	N/A
Client Name	!! Test Broker	Client/Lender on Report	A&D Mortgage, LLC
Client Branch Name	Select One		
Product	-- Select One --	Transaction Type	Refinance
Date Appraisal Needed			
Ordered By/Loan Officer	Sample Broker	Loan Processor	-- Select One --
Addl. Processor/Assistant	-- Select One --	Addl. Processor/Assistant	-- Select One --
Comments	Please send the secured payment link to me (your email address). Thank you.		
<input type="button" value="Proceed To Pay"/> <input type="button" value="Cancel"/>			

7) Click on the **Place Order** button.

PAYMENT INFORMATION	
Fee for the selected product is not defined. The duplicate order will be placed with \$0 Fee.	
Payment Method	<input checked="" type="radio"/> Credit Card Payment Option(s) <input type="button" value="Send a payment request to the borrower"/>
I acknowledge that I have been authorized by the card holder to use this card to pay for the fees associated with this appraisal order	
<input type="button" value="Back"/> <input type="button" value="Place Order"/> <input type="button" value="Cancel"/>	

Email Appraisal Report(s)

Once the order is **completed**, you have the ability to email the report(s) to the client or anyone else.

To **Email an Appraisal Report**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to email the appraisal report.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Select the **Email Appraisal Report(s)** option.

- 6) Select Client on the “Email Report(s) To” field to mail the report to the Client OR select Other to email the report to any email address.
- 7) Select the report(s) that you want to email to the recipient.
- 8) Add a message with your email (Optional).
- 9) Click on the **Email Appraisal Report** button to send the email.

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

Perform a Final Appraisal Review

To **perform a final Appraisal Review**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to Perform the final Appraisal review.
- 3) Open the **Manage Order** screen by clicking on the Order Number (e.g. R19-00000).
- 4) Click the **Actions -> Final Appraisal Review**
- 5) On the Appraisal Status. Click on,
 - **Accept** to accept the Appraisal Report
 - **Decline** to decline the report
- 6) Click on **Save Review** to Submit.

Send Report(s) to Borrower

If the Borrower’s email address is entered on the order, the system can securely deliver reports for **completed orders** to the borrower in a compliant manner.

To **Send the Report(s) to the Borrower**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to send the reports to the borrower.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).

- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Select the **Send Report to Borrower** option.
- 6) Add a message with the report (Optional).
- 7) Click on the **Submit** to send the email.
- 8) The borrower will be sent a secure link via email where they will be prompted to accept electronic delivery of the Appraisal Report.
- 9) Once they accept the electronic delivery, they will be required to get an Authorization Code which will be sent to them via email along with a link to download the report.
- 10) The borrower will be required to enter the Authorization code to download the report.

Note: The acceptance of electronic delivery and the download of the report are time-stamped and logged into the audit trail of the order. A certificate of delivery mentioning the time of delivery and time of download of the report is automatically generated by the system and saved in the documents section of the order.

Reporting

Ad-hoc Appraisal Report

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

- 1) Log on to your AD Appraisal Center account.
- 2) Click **Reports** on the main menu.
- 3) Click **Ad-Hoc Report** on the sub menu.
- 4) Filter your results by selecting any of the fields below:
 - a. Keyword (searches the Appraisal Number and the Appraisal Description. Partial matches are allowed)
 - b. Client
 - c. Branch
 - d. Appraisal Type

- 5) Select a **Start Date** and the **End Date** for the report .
- 6) Click **Generate Report** to get results. Results are returned in a grid format.



Billing

View Invoice

Order invoice is generated when the order is created in the system.

To **View the Invoice for an Appraisal**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) **Search** for the Appraisal Order for which you want to view the invoice.
- 3) Open the Manage Order screen by clicking on the Order Number (e.g. R15-00000).
- 4) Click on the **Actions** button on the top right of your screen to reveal options.
- 5) Click on **View Invoice** option to view the invoice for that order.
- 6) The invoice may be printed, emailed or saved as a PDF file from this screen by clicking on the Actions button on the top right of your screen.

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

Make Payment

AMC will be sending secured link to the borrower for collecting the payment.

You can add a comment and ask AMC to resend or share payment link with you.

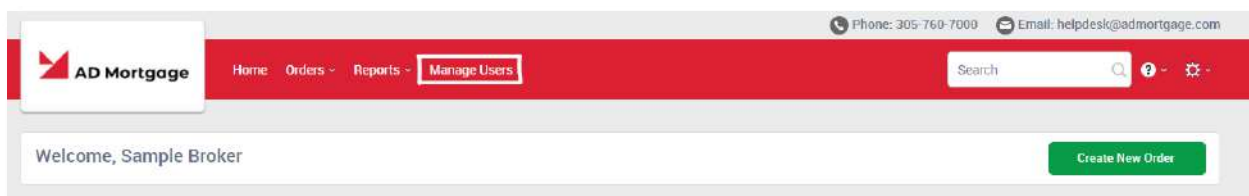
User Profile

Add New Users (Master Users Only)

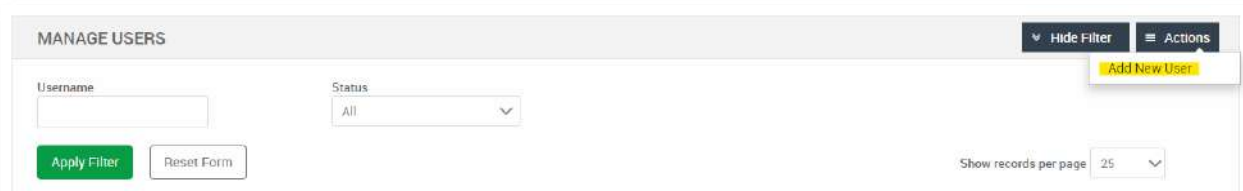
Client **Master Users** have the ability to add users for their company to the system.

To **Add Users** to the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



- 3) Click on the **Actions** button on the top right of your screen and click on **Add New User**.



- 4) Fill out the user's information and assign them a username and password.

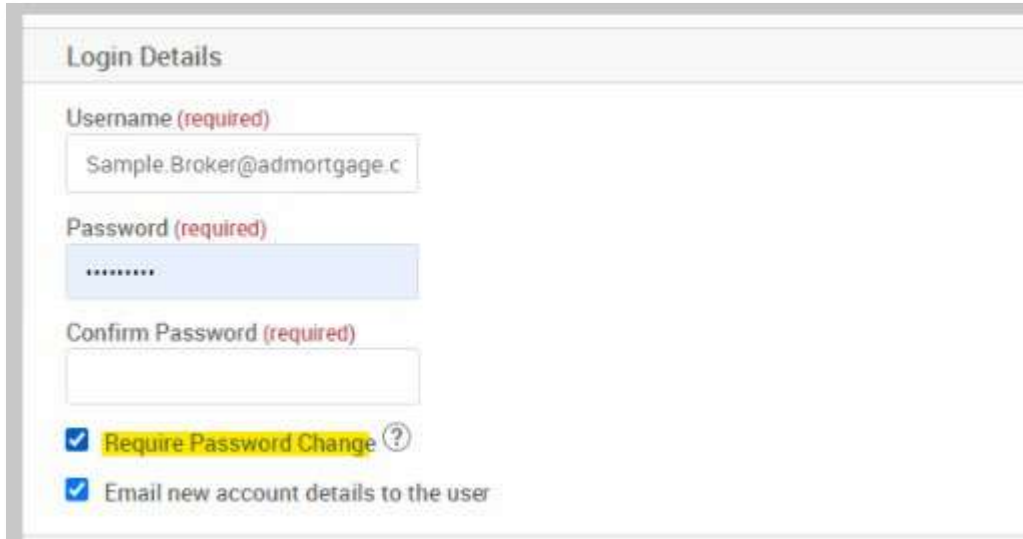
ADD NEW CLIENT USER

You may use the screen below to add users for your company. When you add a user, they will receive an email notification with their credentials

User Details

<p>Client (required) <input type="text" value="Test Broker"/></p> <p>First Name (required) <input type="text"/></p> <p>Email (required) <input type="text"/></p> <p>Department <input type="text"/></p> <p>User Notes <input style="width: 100%; height: 40px;" type="text"/></p>	<p>Last Name (required) <input type="text"/></p> <p>Phone <input type="text"/></p> <p>Type <input type="text" value="Select One"/></p>
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5) Username is the user's email address. Select the Require Password Change button.



Login Details

Username (required)

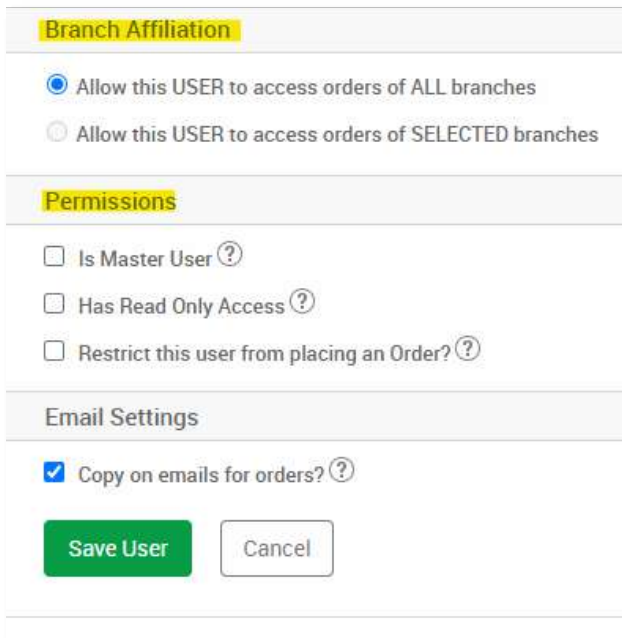
Password (required)

Confirm Password (required)

Require Password Change (?)

Email new account details to the user

6) Select the Branch Affiliation and the type of Permissions the user will have.



Branch Affiliation

Allow this USER to access orders of ALL branches

Allow this USER to access orders of SELECTED branches

Permissions

Is Master User (?)

Has Read Only Access (?)

Restrict this user from placing an Order? (?)

Email Settings

Copy on emails for orders? (?)

Save User Cancel

Note: Hover over the question marks for description of each permission access.

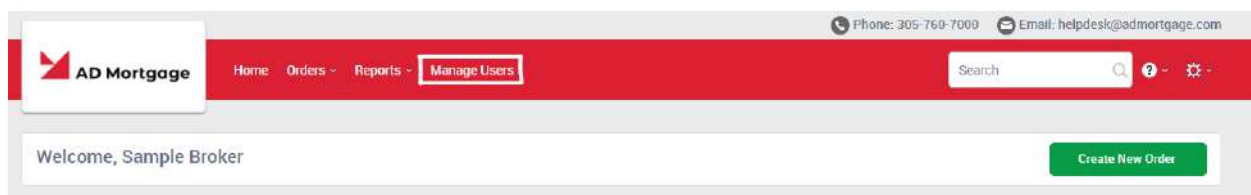
7) Click on the **Save User** button to add the user to the system.

Edit Company Users (Master Users Only)

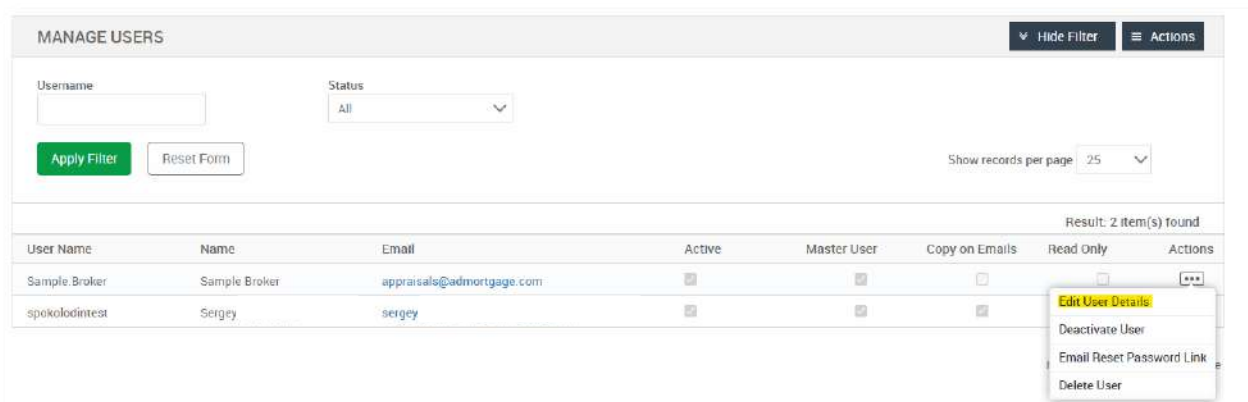
Client Master Users can also edit/update information for all users for their company.

To **edit information of Company Users** on the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



...



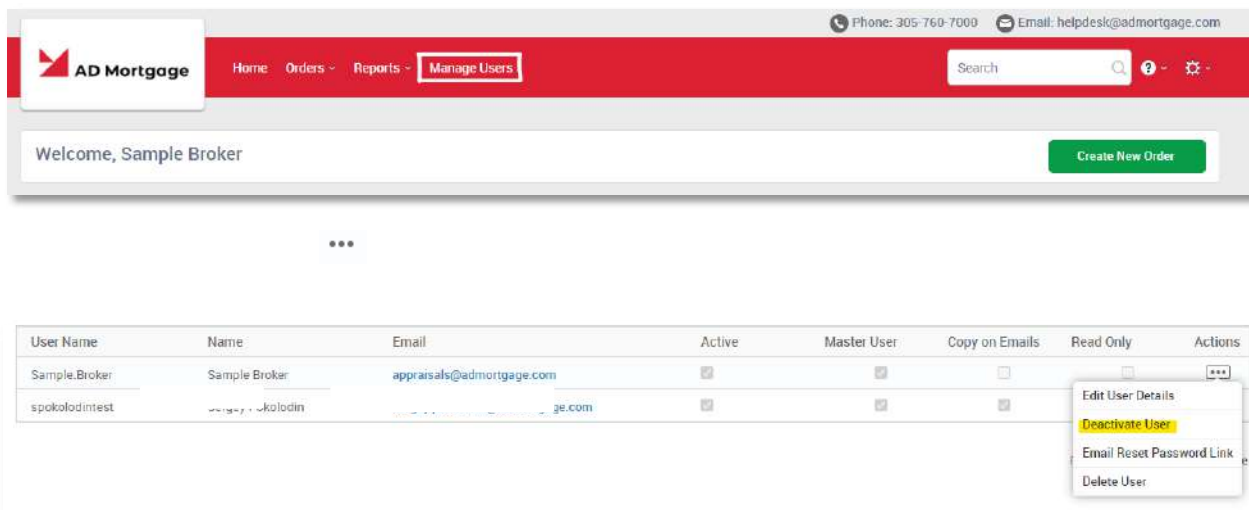
- 4) Make the necessary changes to the user's profile.
- 5) Click on the **Save User** button to save the updated information in the system.

Deactivate Company Users (Master Users Only)

Client Master Users have the ability to deactivate users in their company so that they no longer have access the system or receive system notifications.

To **Deactivate Users** on the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



- 4) Click on **Deactivate User** to deactivate the user's profile.

The same process can be followed to re-activate profiles of users which have been deactivated.

Change Profile Information

To **Change your Profile Information**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.



- 3) You may update the First Name, Last Name, and Email Address on this screen.
- 4) Select the **Copy on emails for orders?** checkbox to enable email notification for all orders.
- 5) Click **Save Changes** to update your profile

Change Password

To **Change your Password**, follow the steps below:

- 1) Log on to your AD Appraisal Center account.



- 3) Enter your Current Password, New Password, and Confirm the New Password.
- 4) Click the **Change Password** button.

Support

View Knowledge Base

If you need help using the system, you can visit our knowledge base by following the steps below :

- 1) Go to <https://valuelinksoftware.zendesk.com/hc/en-us/categories/200089667-Knowledge-Base>

OR

- 2) Log on to your AD Appraisal Center account.



Open a Support Ticket

If you can't find the answer you need in the Knowledge Base, you can always open up a Support Ticket with our support team. To open a Support Ticket, follow the steps below:

- 1) Go to <https://valuelinksoftware.zendesk.com/hc/en-us/requests/new>

OR

- 2) Log on to your AD Appraisal Center account



- 4) Our support team normally responds within the first 30 minutes of opening the support ticket.

Give us a Call

If you need urgent assistance, you can always give us a call between 8 AM and 6 PM Central Time on the number mentioned below:

888-587-0805 x. 2 (Support)