



AD Appraisal Center

User Guide for Clients: Ordering an Appraisal

Powered by



Appraisals

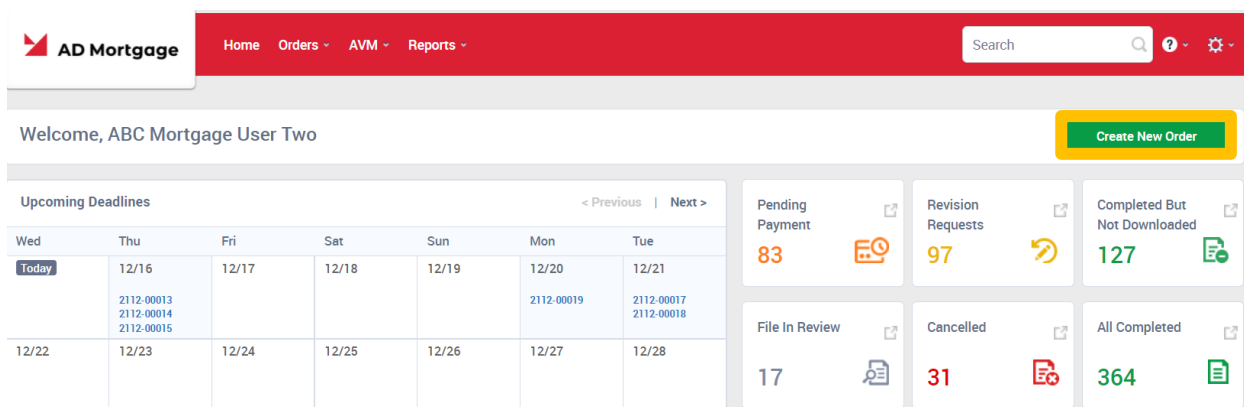
Create New Order

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.



The screenshot shows the AD Mortgage user interface. At the top, there is a red navigation bar with the AD Mortgage logo, navigation links (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 prominent yellow 'Create New Order' button. The main dashboard area is divided into two sections. On the left, there is a table titled 'Upcoming Deadlines' with columns for days of the week (Wed to Tue) and dates (12/16 to 12/28). Some cells contain loan numbers. On the right, there is a grid of six summary cards: 'Pending Payment' (83), 'Revision Requests' (97), 'Completed But Not Downloaded' (127), 'File In Review' (17), 'Cancelled' (31), and 'All Completed' (364). Each card includes an icon representing its category.

- 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>
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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>
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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>
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Access Information Section

<p>Contact Person <input type="text" value="Select Contact Person"/></p> <p>Other Access Instructions <input type="text" value=""/></p>

- 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 <input style="width: 90%; background-color: #ffff00;" type="text"/>	Agent Email <input style="width: 90%; background-color: #ffff00;" type="text"/>
Agent Phone <input style="width: 90%; background-color: #ffff00;" type="text"/>	Agent Work Phone <input style="width: 90%;" type="text"/>
Agent Cell Phone <input style="width: 90%;" type="text"/>	

Appraisal Information

Product (required) <input style="width: 95%; background-color: #ffff00;" type="text"/>	Appraisal Fee: \$0
<input checked="" type="checkbox"/> UAD Report Needed	
Additional Item 1 <input style="width: 95%; background-color: #f0f0f0;" type="text"/>	
Additional Item 2 <input style="width: 95%; background-color: #f0f0f0;" type="text"/>	
Additional Item 3 <input style="width: 95%; background-color: #f0f0f0;" type="text"/>	
Sales Price <input style="width: 95%;" type="text"/>	

Vendor Assignment

AMC <input style="width: 95%; background-color: #ffff00;" type="text"/>	Vendor's Fee <input style="width: 95%;" type="text"/>
Additional Message <input style="width: 95%; background-color: #f0f0f0;" type="text"/>	
<input type="checkbox"/> Append Common Response to the text below	
Vendor Message <div style="border: 1px solid #ccc; height: 40px; width: 95%;"></div>	

Dates

Date Appraisal Needed <input style="width: 95%;" type="text"/>	Estimated Delivery Date <input style="width: 95%; background-color: #f0f0f0;" type="text"/>
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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 style="width: 100%;" type="text"/></p>	<p>Orderer Phone <input style="width: 100%;" type="text"/></p> <p>Addl. Processor/Assistant <input type="text" value="-- Select One --"/> ?</p>
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Other Details

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

Tracking Number <input style="width: 90%;" type="text"/>	Vendor File Number <input style="width: 90%;" type="text"/>
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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 place 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 selected 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.