

Experience the Difference

Appraiser Manual

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System Requirements

Computer/Processor	Computer with a 486/66-megahertz (MHz) processor or higher (Pentium processor recommended)
Operating System	Windows 98, Windows Me, Windows NT 4.0 with Service Pack 6a (SP6a), Windows 2000 or Windows XP
Browser	Internet Explorer 5.5 or Higher / AOL 8 or Higher with cookies enabled
RAM / Hard Disk	Memory and hard disk requirements depend on the operating system used
	Windows 95: 16 MB of RAM minimum Full install size: 11.5 MB
	Windows 98: 16 MB of RAM minimum Full install size: 11.5 MB
	Windows 98 Second Edition: 16 MB of RAM minimum Full install size: 12.4 MB
	Windows NT 4.0 with SP6a and higher: 32 MB of RAM minimum Full install size: 12.7 MB
	Windows 2000: 32 MB of RAM minimum Full install size: 12 MB
	Windows Me Edition: 32 MB of RAM minimum Full install size: 8.7 MB
	Windows XP: 32 MB of RAM minimum Full install size: 12 MB
Display	Super VGA (800 × 600) or higher-resolution monitor with 256 colors * Super VGA (1024 x 768) strongly recommended
Peripherals	Microsoft Mouse, Microsoft IntelliMouse®, or compatible pointing device
Internet Access	56k modem with Dial-up connection, or High speed Internet Access (Cable, DSL, or xDSL, ISDN, Frame relay, T1, T2, T3, T4) strongly recommended

Logging Into the Appraiser System

What You Will Need

In order to log into eTrac, you must have the *URL link* that was sent to you via e-mail by US Appraisal Group, along with the associated *Username* and *Password*.

Once you are logged in, eTrac will allow you to view, track, and update all of your orders.

How to Log In

To log in to eTrac, do the following:

- 1. Open your web browser and type the URL link into the address bar.
 - Note: In order to use eTrac, you must have cookies enabled in your browser and have AOL 5.0, or Internet Explorer 5.0 or greater.
- 2. Press ENTER to connect with the login page.
- 3. Type the Username and Password that you received (via email) in the text boxes provided and then click the **Log** in button.

Note: If you forgot your username and/or password, click the **Click here** link next to the "Forgot your password?" prompt. Enter your email address in the field provided and click the **Send Info** button. Your login information will automatically be sent to you via email.



The Appraiser Login Page

After successfully logging in, a Welcome page displays.

4. At the Welcome page, click the **Appraiser Menu** link to enter the program.

Sorted by: • Ascendi		cending					
File #	Loan #	Borrower	Address	<u>Client</u>	Date Due	Status	Inspection Scheduled
00-4469	0123	Homeowner Name	Address - City, NJ 07000	eTrac Demo Mortgage Company NJ	12/31/2006	On Hold	
<u>0000-1</u>	00741	Jason Silverman	21 Van Street - Spring Valley, NY 10077	eTrac Demo Mortgage Company NJ	12/31/2006	Scheduled	1/25/2006
0000-4	00654	Tammi Abbott	12 Adams Street - Oksmoke, OK 08000	Carls Mortgage Company	12/31/2006	Assigned	
0000-44	0123	Borrower Name	Property Address - City, PA 08880	eTrac Demo Mortgage Company NJ	12/31/2005	Left Msg	
<u>0000-6</u>	00138	Fran Kukla	37 Morris Road - Spring Valley, NY 10001	eTrac Demo Mortgage Company PA	12/31/2005	On Hold	
0000-7	00648	Borrower Name	Property Address - City, NY 10000	eTrac Onetimer Lending	1/16/2004	On Hold	

eTrac's main Appraiser Menu page

Viewing New Orders

Use the following procedure to view appraisal orders that have been assigned. (Only orders with the status showing as assigned will appear in List All New)

- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **List All New** button. This opens the All New Orders page.



Viewing Open Orders

Use the following procedure to view appraisal orders that have not been completed yet.

- 1. Click the Main tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **List All Open** button. This opens the All Open Orders page.



The All Open Orders page

Note: You may need to scroll down the page in order to view all of the orders listed.

Editing the Status of an Order

Use the following procedure to edit the status of an open order.

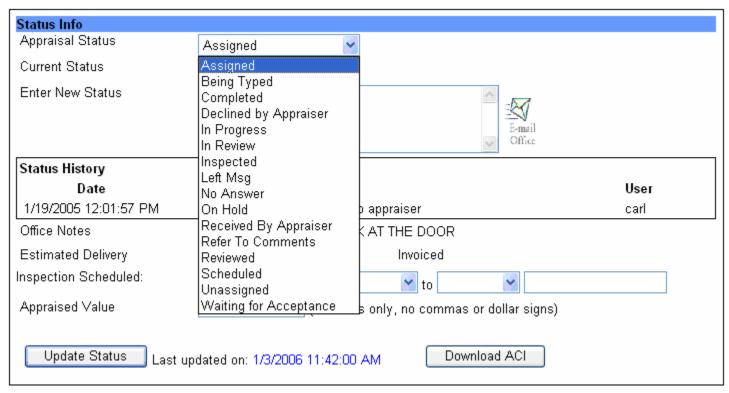
- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **List All Open** button. This opens the All Open Orders page.
- 3. Under the **File Number** column, locate the order you want to edit and click the file number link.

File Number	Loan #	Borrower	Address	Client	Date Due	Status
<u>69</u>		Amy	1213 - hghgh, PA 19064	Leonard Tillery ESQ.		Assigned
<u>66</u>		Borrower name	111 Property Address - highstown, PA 19064	Leonard Tillery ESQ.		Assigned
<u>1206</u>		SSS	sss - ss, PA ss	Leonard Tillery ESQ.		Unassigned
0045		Borrower name	,111 Property Address - Springfield, PA 19064	Free Money Bank		Assigned
0044		Joe Borrower	123 - Springfield, PA 19064	Free Money Bank		Assigned
0044 0043		Vlad	491 - Swarthmore, PA 19081	Free Money Bank		Assigned

Click the File Number link to edit that order.

The Order Form page displays.

4. Scroll down the page until you can view the **Status Info** section.



The Status Info section of the Order Form

5. Click the **Appraisal Status** list and choose one of the status options, as described below. There are sixteen different status options:

Assigned	Appraisal has been assigned to an appraiser. The first time you attempt to edit an order the status will be set to Assigned .
Being Typed	Appraisal is being written.
Completed	Appraisal is completed. (This option must be enabled by your office.)
Declined by Appraiser	Appraiser decides that they do not want to do the appraisal.

In Progress Appraisal is being written-up. (Many companies do not use In Progress,

check with your appraisal company before selecting In Progress)

In Review Appraisal is completed and sent to the office for review.

Inspected Appraisal inspection is complete.

Left Msg Have left a message with the client.

No Answer Unable to contact the client.

On Hold Appraisal is on hold by request of the client.

Received by Appraiser The appraisal is received by the appraiser.

Refer to Comments

This is a special note or instruction that should be noted.

Reviewed Appraisal information has been reviewed.

Scheduled Appraisal has been scheduled for inspection.

Unassigned This appraisal has not been assigned yet.

Waiting for Acceptance If the appraiser's access level is set to review you will get this status to approve the pending updated status that the appraiser has requested.

6. In the **Current Status** field, enter any comments or information (if necessary) to support the appraisal status. For example, if you changed the status to **Left Msg**, you might use this field to enter the phone number you called, the date and time of day, and the message you left.

7. If an appointment is rescheduled, then you must change the date and time in the **Inspection Scheduled** field. To specify a new date, click the calendar button and select a new date from the calendar box.

- The current month displays at the top of the box
- To select a date in the current month, click that number to fill the date in the form field.
- Use the <<< and >> buttons on either side
 of the month to scroll backwards/forwards
 (respectively) to other months



You can also change the date manually, but it must be in the format MM/DD/YYYY.

For example: 01/13/2002

8. Use the **Estimated Delivery** field to indicate the estimated date that you will be able to send the appraisal to the office for review.

<u>NOTE:</u> Many offices do not require using the **Estimated Delivery** field. Check with your appraisal office before using Estimated Delivery.

9. If the appraised value of the property has changed, indicate this in the **Appraised Value** field. Use numbers only in this field... no symbols or punctuation.

For example: If the amount is \$248,000, enter 248000

10. After completing the changes to the order, click the **Update Status** button. (The actual button name will depend on how eTrac has been configured for your office.)

You are returned to the All Open Orders page.

Downloading Order Data to Appraisal Forms software

eTrac allows you to easily download your order data into your appraisal forms software. The data transfer typically includes the file number, borrower, property address, client, and client address. This feature will eliminate re-keying of data and save time. This feature requires ACI forms 8.5.2 or higher or AI Ready download compatible forms software.

Use this procedure to download orders.

Click the Main tab at the top of the page. The Main menu displays along the left edge of the page.
 From the Main menu, click the View Open button. The View Open Appraisal Orders page opens, listing all currently open order.

View Open Appraisal Orders								
Showing op	en files 1 to 50 of 192							
<u>File</u> Number	Client	<u>Borrower</u>	Address	<u>Appraiser</u>	<u>Due Date</u>	<u>Status</u>		
0000	<u>eTrac Mortgage - NJ</u> <u>Office</u>	Borrower name	10 Property Address - Ctiy, NJ 09000	<u>Carl</u>	4/4/2004	In Progress		
0008	eTrac Mortgage - PA Office	Fred Novak and Judy Gibson	111 Property Address - Brooklyn, MD 08629	<u>Kevin</u>		Assigned		
00123	Approved Bank	Robert Waldeck	1 Main Street - Malibu, NJ 99999	<u>John</u>		In Review		
0021356	Mortgage Company	Hank Mase	233 Joesph Ave - Rockville, MD 08629	Reviewer		Scheduled		
0030	Carteret Mortgage Corp	Borrower Name	Property Address - City, NJ 19064	Reviewer		Scheduled		
<u>009856</u>	Carteret Mortgage Corp	Fred Novak	Property Address - City, MD 08629	<u>John</u>		No Answer		
040904	Approved Bank	fssafsadfsadf	afdsadsafsaf - asdfsadfsadfdsafsa, NJ dsfsd	<u>Carmen</u>		Assigned		
<u>10000</u>	Mortgage Company	Greg Jean Soral	4605 Tempest Road - Fort Myers, FL 90001	<u>Carl</u>		In Progress		
<u>12112</u>	Carteret Mortgage Corp	Aime Miller	1126 7th ave - swarthmore, NJ 12121	Reviewer		Scheduled		
<u>23030077</u>	eTrac Mortgage - NJ Office	Charles Abrams	67504 Gallagher Boulevard - Port Charlotte, CA 90001	<u>Carl</u>		Assigned		

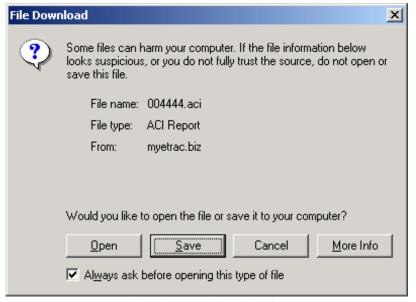
The View Open Appraisal Orders page

- 2. Click the **File Number** link to view the detailed order information.
- 3. Scroll to the bottom of the page and click the download button. (This can be ACI or AI Ready depending on your configuration.)



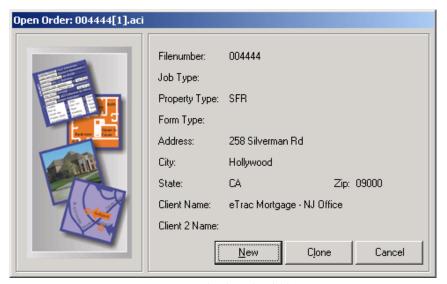
The bottom portion of the View Open Appraisal Orders page

4. The File Download dialog box displays if ACI or a compatible AI-ready (*Day One, Bradford, Software for Real Estate Professionals, Alamode, and United Systems*) forms package is installed.



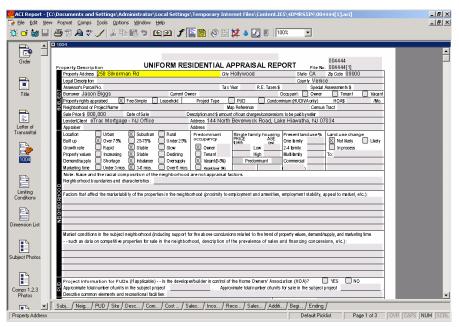
The File Download dialog box

5. Click **Open** to download the forms data unless you are using ACI then you must click **Save** and choose your reports folder to store the file. ACI users can then click **Open** after download.



Opening the download file

6. Click **New** or **Clone** to transfer the data into the file.



Transferring the download file to the ACI Report

Viewing Completed Orders

Use the following procedure to view appraisal orders that have been completed.

- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **Completed Orders** button. This opens the All Completed Orders page.

All Comp	All Completed Orders						
Showing reco	Showing records 1 to 50 of 128						
File Number	Loan#	Borrower	Address	Client	Completed		
0000	000120	Borrower name	10 Property Address - Ctiy, NJ 09000	eTrac Mortgage - NJ Office	4/26/2004		
<u>23030519</u>		Carlton Young	76760 Brinson Ave Unit 764 - Port Charlotte, CA 90001	eTrac Mortgage - NJ Office	4/16/2004		
3110074	4444	Chuck Jones	123 Smith Street - Smthville, NJ 09000	eTrac Mortgage - NJ Office	3/5/2004		
23030369		Kenneth & Donna Langford	4630 6st Avenue NW - Naples, CA 90001	Approved Bank	1/6/2004		
N Branch 044		Skip Wilsen	111 Main Street - Santa Monica, CA 08629	eTrac Mortgage - NJ Office	10/13/2003 9:00:00 PM		
NJ00123	0044669	Carl Stuono	144 North Beverwyck Rd - Lake Hiawatha, NJ 07034	eTrac Mortgage - NJ Office	9/16/2003 9:00:00 PM		

The All Completed Orders page

NOTE: You may need to scroll down the page to view all of the orders listed.

Viewing Canceled Orders

Use the following procedure to view only those appraisal orders that have been cancelled.

- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **Cancelled Orders** button. This opens the All Completed Orders page.

All Cance	All Cancelled Orders							
Showing reco	Showing records 1 to 9 of 9							
File Number	Loan#	Borrower	Address	Client	Cancelled			
23030304		Jesus & Margarita Medina	76630 Bridgeport Lane - Bonita Springs, CA 90001	Sherwood Mortgage	4/15/2004 12:50:00 AM			
23030478		Angela Menendez	4646 Hamlin Rd. E - Ft.Myers, CA 90001	eTrac Mortgage - NJ Office	4/15/2004 12:50:00 AM			
10000	010025	Greg Jean Soral	4605 Tempest Road - Fort Myers, FL 90001	Mortgage Company	4/15/2004 12:49:00 AM			
<u>eTrac</u>	4587	eTrac	144 North Beverwyck Rd - Lake Hiawatha, NJ 07082	eTrac Mortgage - NJ Office	11/10/2003 10:42:00 AM			

The All Cancelled Orders page

NOTE: You may need to scroll down the page to view all of the cancelled orders in the list.

Viewing All Orders

Use the following procedure to view all orders, regardless of their status.

- 1. Click the Main tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **All Orders** button. This opens the All Completed Orders page.

All Orde	All Orders							
Showing records 1 to 25 of 146								
File Number	Loan#	Borrower	Address	Client	Date Due	Status		
testorder		Borrower name	111 Property Address - test, NJ zip	eTrac Mortgage - NJ Office		Completed		
<u>23040775</u>		Steven See	6656 Magnolia Ln - Ft. Myers, CA 90001	Third Community Mortgage	9/5/2003	On Hold		
0000	000120	Borrower name	10 Property Address - Ctiy, NJ 09000	eTrac Mortgage - NJ Office	4/4/2004	Completed		

The All Orders page

NOTE: You may need to scroll down the page to view all of the orders listed.

Calendar

The Calendar allows the appraisal office to keep track of the scheduled appraisals and appraisals due. It also helps the appraiser organize and remember his/her scheduled appraisals.

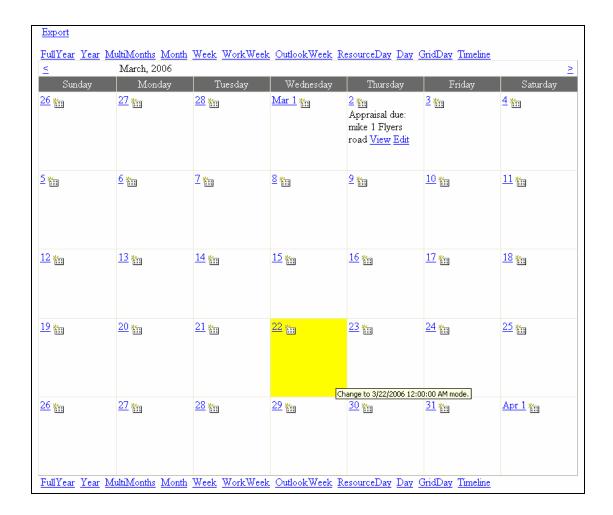
Use the following procedure to view the calendar.

- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu, click the **Calendar** button. This opens the shared calendar.

You have the option to export all your scheduled appraisals to Microsoft Outlook by clicking export.

The calendar is also an option that needs to be activated for your view by the appraisal office.

See the following page to view the calendar.



My Messages

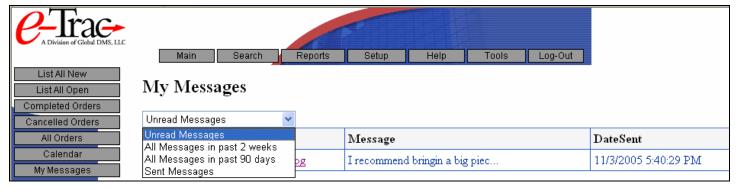
My Messages allows you to send messages between you, the office, and other appraiser users.

Use the following procedure to view "My Messages".

- 1. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.
- 2. From the Main menu click the **My Messages** button. This opens your messages page.

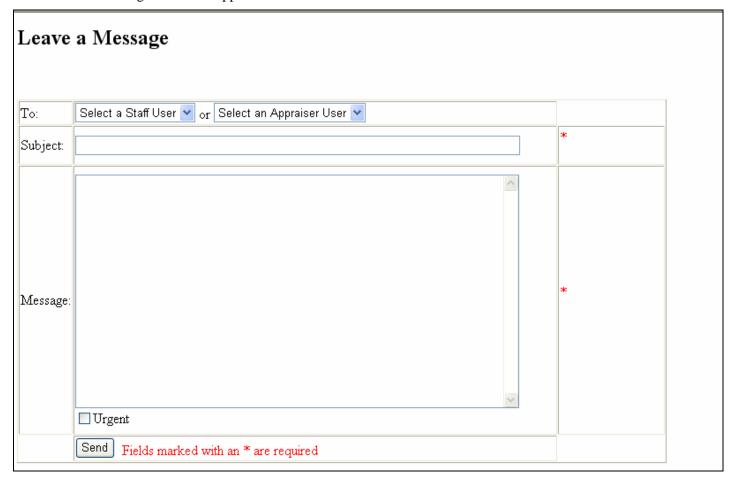


3. After clicking the **My Messages** button it will automatically open up to your unread messages.



- 4. If you would like to view any previously received messages click the dropdown like shown above. You will also be able to view a log of your sent messages as well.
- 5. To send a message click **Tools** at the top of the page. The tools menu displays along the left edge of the page.
- 6. From the tools menu click the **Leave Message** button.

The following screen will appear in a new window.



Searching Orders

eTrac includes a flexible search utility so you can locate orders by file number, address, borrower, and loan number.

1. Click the **Search** tab at the top of the page. The Search menu displays along the left edge of the page.

2. From the Search menu, select the type of search you want to perform and click the appropriate button.

File Search

Enter the exact file number you are looking for in the Enter

File Number text box and click the Search button. File
searches will only find results that exactly match your
search criteria. For example, searching on "12" will NOT

return file #112.

Address Search Enter all or part of the address you are searching for in the

Enter Property Address text box and click the **Search**

button.

Borrower Search Enter all or part of the borrower's name that you are

searching for in the Enter Borrower Name text box and

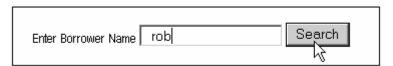
click the **Search** button.

Loan Search Enter the exact loan number you are looking for in the **Enter**

File Loan # text box and click the **Search** button. Loan searches will only find results that exactly match your search criteria. For example: Searching for "10" will NOT

return loan #1102.

Note: Searches can be as general or specific as you want, and they are NOT case sensitive. For example, if you are searching for a borrower and enter "rob" as your search word, it will find any borrower whose name includes those letters, such as Robbie, Roberts, and Jarobski.



Searches are not case sensitive and can be as general or specific as you want.

After you click the Search button, any files that match your search criteria are listed. The top line of the report shows you how many results were found.

Showing files 1 to 1 of 1				
File Number	Loan#	Borrower	Address	Status
0000	000120	Borrower name	10 Property Address - Ctiy, NJ 09000	Completed

Search results

Reports

eTrac's reporting feature enables you to instantly view a report of your open receivables or your paid receivables.

1. Click the **Reports** tab at the top of the page. The Reports menu displays along the left edge of the page.

2. From the Reports menu, select the type of report you want to view and click the appropriate button.

Receivables Open The receivables open report lists all reports that have been

billed to the client and have not been paid to the appraiser.

Receivables Paid The receivables paid report lists all reports that have been

paid to the appraiser within the last 60 days.

The report displays the requested information.

Open Accounts Receivables

There are 14 appraisals due to be paid to Carl .

Total current receivables = \$2,755.00

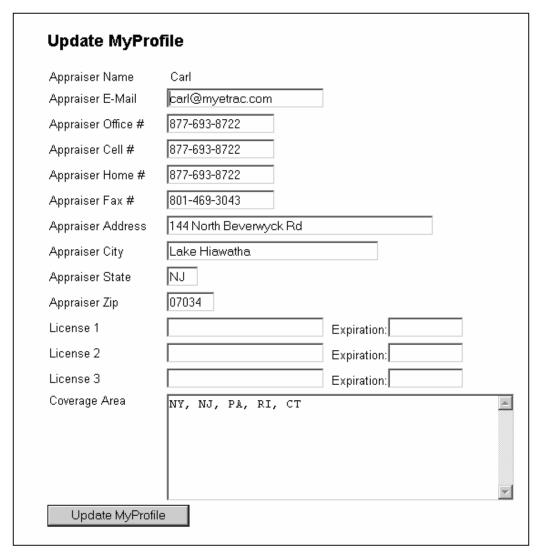
File #	Borrower	Address	Product	CompletedInvoiced	Fee
23030280	lan Matheson	3466 Pointe Creek Court - Bonita Springs, CA 90001	URAR	3/31/2004	
23030287	Nancy Moss	6466 SE 64th Place - Cape Coral, CA 90001	URAR	3/23/2004	\$195.00
23030288	Burt Lancaster	7367 Wellington Avenue - Alva, CA 90001	URAR	3/23/2004	\$110.00
23030295	Douglas Aldridge	876 Limpkin Road - Naples, CA 90001	URAR	3/5/2004	\$165.00

Example of a 'Receivables Open' Report

Changing Your Appraiser Profile

If necessary, you can update any aspect of your profile information except for your name. This allows you to make changes to your contact information, license information, and coverage area. Use the following procedure to edit your profile.

- 1. Click the **Setup** tab at the top of the page. The Setup menu displays along the left edge of the page.
- 2. From the Setup menu, click the **My Profile** button. The Update My Profile page opens, displaying all of your appraiser information.



The Update My Profile page

- 3. Make the desired changes to the information in your profile. (You are not allowed to change your name.)
- 4. Click the **Update My Profile** button at the bottom of the page. A message displays to notify you that your profile has been updated.

Sending Office E-mail

eTrac makes it convenient to send email messages back to your appraisal office.

NOTE: Depending on your access level you may or may not be able to see the E-mail Log Icon or the E-mail Client Icon.

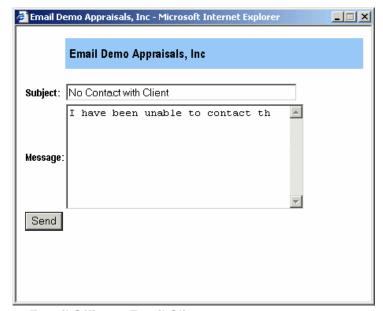
This will allow you to send any questions or comments to the appraisal office.

This will allow you to see any emails that you have send to the office or to the appraiser.



This will allow you to send any questions or comments to the client. (You will only see this option if your office has it configured so that you can email the client.)





Click the **E-mail Office** or **Email Client** icon to launch the Email form window

NOTE: The email icon disappears as soon as you make a menu selection from the left side of the page. It reappears when you click a tab at the top of the page.

Help

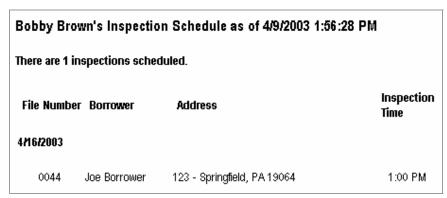
You can access eTrac online help information by clicking the **Help** button at the top of the page. The help feature is context sensitive, meaning that it will provide help information about the menu or page you are currently viewing. For example, if you click the **Reports** tab and then on the **Help** button, the help system will display information about the Reports page.

Reviewing Your Inspections Scheduled

eTrac makes it easy for appraisers to review their current inspections scheduled.

- 1. Click the **Tools** tab at the top of the page. The Tools menu displays along the left edge of the page.
- 2. From the Tools menu, click the **My Schedule** button.

A separate browser window opens, displaying all of the inspections that have the status "Scheduled".



Example of an Inspection Schedule

Logging Out

When you are finished using eTrac, you should log out so no one else can access your account.

To log out, simply click the **Log-Out** tab.

After you are logged out, you will see the message, "Thank you for using eTrac". You may now close your browser window, if desired.