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REAL ESTATE
APPRAISAL MANAGEMENT

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Client Manual

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New User Registration

Client: eTrac Demo Mortgage Company NJ located at 144 North Beverwyck Rd in Lake Hiawatha was found. If this is the client you work for, please click Continue.

Continue

Setup Complete

Your account has been created. Use the Client Logon to order and check status of appraisals.

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 Client System

What You Will Need

In order to log in, 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, the eTrac system will allow you to view, track, and update all of your orders.

Client Self Registration

<u>NOTE:</u> *You can only self register if you are an existing client with no current log in.*

Here is where you would enter the client code and location number that you retained from the appraisal company when you are done click **'Register'**

After you input the client code and location number it will have you verify that the matching client is indeed the one you work for. If the information is correct click **'Continue'**.

New User Registration

Client: eTrac Demo Mortgage Company NJ located at 144 North Beverwyck Rd in Lake Hiawatha was found. If this is the client you work for, please click Continue.

[Continue]

Setup User

Client Name	eTrac Demo Mortgage Company NJ
First Name	
Last Name	
User Name	
Password	
E-mail Address	

Email Notifications

Check the boxes for each status that you would like to be notified about.

- ☐ Assigned
- ☐ Being Typed
- ☐ Cancelled
- ☑ Completed
- ☐ Declined by Appraiser
- ☐ Deleted
- ☐ In Progress
- ☐ In Review
- ☑ Inspected
- ☐ Left Msg
- ☐ No Answer
- ☐ On Hold
- ☐ Received By Appraiser
- ☐ Refer To Comments
- ☐ Reviewed
- ☐ Scheduled
- ☐ Unassigned
- ☐ Waiting for Acceptance

[Finish]

You can now create a username and password that will allow you to track and place orders. All the fields are required. You also have the option to choose what status notifications you would like to receive via email. Click **'Finish'** when you are done.

Setup Complete

Your account has been created. Use the <u>Client Logon</u> to order and check status of appraisals.

You are now done registering and can click <u>Client Logon</u> to enter your client system.

How to Log In

To log in, do the following:

1. Open your web browser and type the URL link into the address bar or click the Client Login button on the appraisal company's website.

    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 if you are typing the URL link into the address bar.

3. Type the username and password that you received (via email) or that you created with the client self registration in the text boxes provided and then click the **Log in** button.

    *Note: If you forgot your username and/or password, select 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.*

Client Login

Please login to check the status of your orders.

In order to use this product you must have cookies enabled in your browser and have Aol 5.0, or Internet Explorer 5.0 or greater.

Username [   ]

Password [   ]

[Log in]   Forgot your password? <u>Click here</u>.

      <u>Click here if you do not have a user name and password</u>.

This is a Client Disclaimer that is added to the Client Login Page. Please use your username and password to enter order and check status.

The Client Login page

After a successful log in, a "Welcome" page displays.

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

Welcome Carl, click here for Client Menu.

Your last login was on 1/1/0001 12:00:00 AM

This opens the main program page, which displays the main menu and lists all currently open orders.

Open Orders
3 records found

Sorted by: [   ]
◉ Ascending ○ Descending

File #	Loan #	Borrower	Address	Status	Date Assigned	Email Msgs
Unassigned IQ		Name	Address - City, NJ 07034	Unassigned	11/18/2005	
10001-I	111805	Cheryl Ham	1 Market Street - Lake Hiawatha, NJ 07034	Assigned	11/18/2005	4 msgs
0000-3	00465	Brenda Bonet	12 Ellen Road - Morris Plains, NY 11000	Refer To Comments	12/24/2004	

eTrac's main program page shows a list of all open orders

How to Order an Appraisal

Use the following procedure to order an appraisal.

5. Click the **Main** tab at the top of the page. The Main menu displays along the left edge of the page.

6. From the Main menu, click the **Order Appraisal** button. This opens the Appraisal Order Form page.

eTrac Demo Appraisal Company Order Form

Reference Infomation 877-693-8722

Loan Number	FHA Number

Client Info

Client   eTrac Demo Mortgage Company NJ
                                               144 North Beverwyck Rd
                                               Lake Hiawatha   NJ 09000

Processor   No User Selected

Processor 2   No User Selected

Ordered By (Name and/or Email Address)   support

Date Needed

Borrower Info

Name	
Address	
City	
State	
Zip	
County	

Assignment Info

Property Type	SFR
Report Type	Select Report Type
Report Type 2	No Report Selected
Report Type 3	No Report Selected
Report Type 4	No Report Selected
Report Type 5	No Report Selected
FHA	No
Intended Use	Market Value
Sale Price	
Estimated Value	
Loan Amount	
Settlement date	

Billing Info

Payment Method	Bill

Contact Info

Name	
Home Phone	
Work Phone	
Other Phone	

Extra Info

Notes / Special Instructions

[Save]   *** To confirm and send order please click [Save]. ***

Use the Print Order button at the bottom of the next page to print a copy of the order for your records.

This is a Client Disclaimer that is added to the Client Login Page. Please use your username and password to enter order and check status.
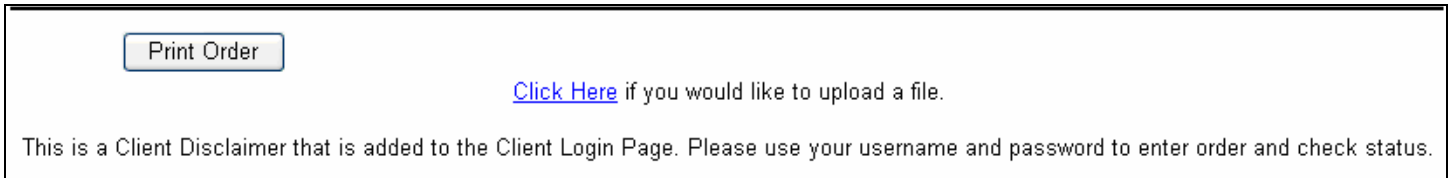
7. Fill out as much information as you can on the form. Some information is required, including the Borrower's **Name**, **Property Address**, **City** and **State**.

   Note: If you try to order the appraisal without the required information, you will receive an error message notifying you that "the required information is incomplete or contains errors."

8. When you are done completing the form, click the **Save** button at the bottom of the page.

   This displays a confirmation page, where you can make sure the order is correct. On this page you can click **Print Order** and you are also able to upload files if you click '**Click Here**'**.**

   If you need to make changes to any information, click on your browser's **Back** button to return to the previous form page, make the changes, and click the **Save** button again.

Uploading a File

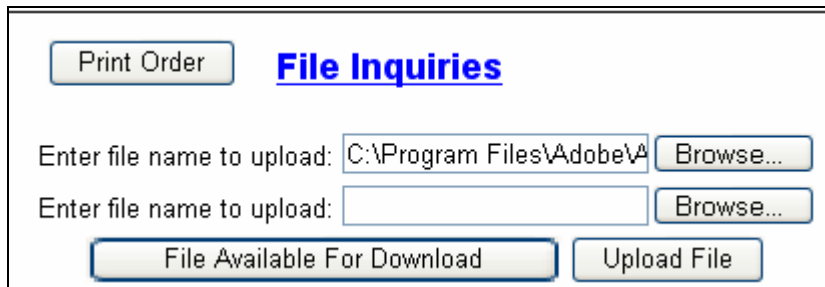9. If you chose to upload a file and you click '**Click Here**' scroll down to bottom until you see the following.

   a. To upload a file you want to click '**Browse**' and locate the file on your computer.

   b. Once you locate the file you want to double click on the file or click '**Open**'

   c. The selected file will then generate in the browse field. Like shown below.

   d. Once your file name is entered click **Upload File** and it will attach to the order.

   <u>**NOTE:**</u> *There are two browse buttons to allow you to upload two files at the same time.*

Viewing Open Orders

Use the following procedure to view all appraisal orders that have not been completed or canceled.

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

The top of this page shows you how many open orders there are in total, and those are shown on the current page. If there are more records than can be shown on the current page, there will be a **Next** link at the bottom of the page that you can use to view the other reports.

Viewing an Order's Details

Use the following procedure to view the detailed status of an 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. Locate the order that you want to view and click on its **File Number** which should be underlined.

Click the link under the File Number column to view the details

E-mail Office   E-mail Log   E-mail Appraiser

eTrac Demo Appraisal Company
Date Ordered: 11/18/2005 1:36:04 PM

Reference Infomation 877-693-8722

File Number	Unassigned IQ		FHA Number
Loan Number			

Client Info

Client	eTrac Demo Mortgage Company NJ
Client Address	144 North Beverwyck Rd
	Lake Hiawatha, NJ 09000
Ordered By	STAFF

Borrower Info

Name	Name
Address	Address
City	City
State	NJ
Zip	07034

Assignment Info

Property Type	SFR	Product 1	Condo Unit - 1025	Fee	$300.00
FHA	No	Product 2		Fee	
Loan Type	Market Value	Product 3		Fee	
Sale Price		Product 4		Fee	
Estimated Value		Product 5		Fee	
Loan Amount					

Billing Info

Payment Method	Bill		Bill date

Contact Info

Name		Home Phone
Work Phone		Other Phone

Status Info

Appraiser Assigned	Carl Appraiser
Appraisal Status	Unassigned
Current Status	

Status History

Date	Status	Message
2/28/2006 1:56:29 PM	Unassigned	
2/21/2006 12:04:17 PM	Unassigned	
11/18/2005 5:30:28 PM	Unassigned	
11/18/2005 5:27:11 PM	Unassigned	

Inspection Scheduled	-		Est. delivery
Office Notes			
Date Completed			
Status Last Updated	2/28/2006 1:56:00 PM		Processed By
Appraised Value			

[Print Order]   **File Inquiries**

Enter file name to upload: [_____] [Browse...]

Enter file name to upload: [_____] [Browse...]

[File Available For Download] [Upload File]

Order detail information

The form opens so you can view the details. The lower section of the form displays its current status information.

4. If you would like to request any additional amendments or add special orders to your order, click the **File Inquiries** link at the bottom of the page. Enter your request on the File Inquiries page and click the **Send** button. Use your browser's **Back** button to return to the order details page.

   *Note: If you would like a hard copy of the order details, click the **Print Order** button at the bottom of the page.*

File Inquiries

Use the following procedure to request an amendment or special request for a file.

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 **File Inquiries** button.

3. In the **File Number** field, enter the number of the file you want to amend and click the **Search** button.

To request amendments or special orders please enter File Number or Loan # below and click search. We will respond ASAP with any / all amendments needed.

File Number | 10001- |

☐ This is a Loan #

Search

Searching by File Number

Showing files **1** to **1** of **1**

File Number	Loan #	Borrower	Address	Status
10001- I	111805	Cheryl Ham	1 Market Street - Lake Hiawatha, NJ 07034	Assigned

4. When the record displays, click the **File Number** link to open the File Inquiries page.

The File Inquiries page

5. Enter your request in the text box provided and click the **Send** button. A confirmation message informs you that your message has been sent.

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. The All Completed Orders page appears.

File #	Loan #	Borrower	Address	Status	Date Completed	Email Msgs	Download
10001- I	111805	Cheryl Ham	1 Market Street - Lake Hiawatha, NJ 07034	Completed	3/1/2006	4 msgs	

The All Completed Orders page

Downloading Completed Appraisals

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. The **All Completed Orders** page appears. To view the uploaded file click on the file number and scroll down to the bottom of the file until you see **Files Available for Download**. Click that and it should show you all files uploaded to that order.

3. Click the file name to open the uploaded file.

Viewing Cancelled Orders

Use this procedure to view only those appraisal orders that have been canceled.

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. The All Cancelled Orders page appears.

3. If desired, you can click the **File Number** link in any record to view the details of that order.

Viewing All Orders

Use this procedure to view all appraisal 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. The All Orders page appears.

3. If desired, you can click the **File Number** link in any record to view the details of that order.

The View All Orders page

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 then click the **Search** button. File searches will find only results that exactly match your search criteria. For example, searching for "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 then 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 then click the **Search** button.
Loan Search	Enter the exact loan number you are looking for in the **Enter File Loan #** text box and then click the **Search** button. Loan searches will find only 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.

In this example we are searching by Borrower Name.

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.

Search results

Reports

eTrac's reporting feature lets you instantly view a report of your open payables or your closed payables.

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.

NOTE: You will only be able to view reports if you are setup with that access level.

Payables Open   The payables open report lists all reports that have been billed but unpaid.

Open Accounts Payable

There are **13** appraisals with payments outstanding.

Total current payables = **$2,802.00**

Invoice #	Borrower	Address	Product	Invoiced	Days Old	Loan #	Balance
eTrac Mortgage - NJ Office							
3120401	email	email - email, nj 07000	URAR URAR Addendum	4/20/2004	7	email	$500.00
3120312	Charles Johnson	12 Happy Street - Harrisburg, PA 09000	Desk Review URAR	4/23/2004	4	00440	$650.00
3110074	Chuck Jones	123 Smith Street - Smthville, NJ 09000	URAR URAR Addendum	1/6/2004	112	4444	$625.00

Sample of a Payables Open Report

Payables Closed   The payables closed report lists all reports that have been recently paid.

Closed Accounts Payable

There were **89** appraisals paid in the last 90 days.

Total closed payables = **$18,976.00**

Invoice #	Borrower	Address	Product	Invoiced	Loan #	Fee
eTrac Mortgage - NJ Office						
testRR2	Robert Cordes	575 deer run - lilburn, ga 30047	URAR	5/6/2003		$254.00
testorder	Borrower name	111 Property Address - test, NJ zip	URAR	9/8/2003		$300.00
NJ00123	Carl Stuono	144 North Beverwyck Rd - Lake Hiawatha, NJ 07034	URAR	9/17/2003	0044669	$300.00
N Branch 044	Skip Wilsen	111 Main Street - Santa Monica, CA 08629	URAR	8/14/2003		$575.00

Sample of a Payables Closed Report

Help

You can access online help information about eTrac by clicking on 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.

Sending Office E-mail

When you click on any tab at the top of the page, an email icon will be available in the main window area. Click on this button to open the email form window. (This icon can also be found on some forms.)

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

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

E-mail Office

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

E-mail Log

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

E-mail Appraiser

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

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

After sending an email, a confirmation page is displayed.

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.