Admin New Appraiser Manual

APPRAISAL MANAGEMENT SYSTEM

MANAGE | TRACK | ADD NEW APPRAISER

Questions? Contact:
Sasheen Chisholm
170 S. Main Street, Suite 204, Orange, CA 92868
Phone: 888-824-8994 x303 | Email:Sasheen.Chisholm@inhouseusa.com

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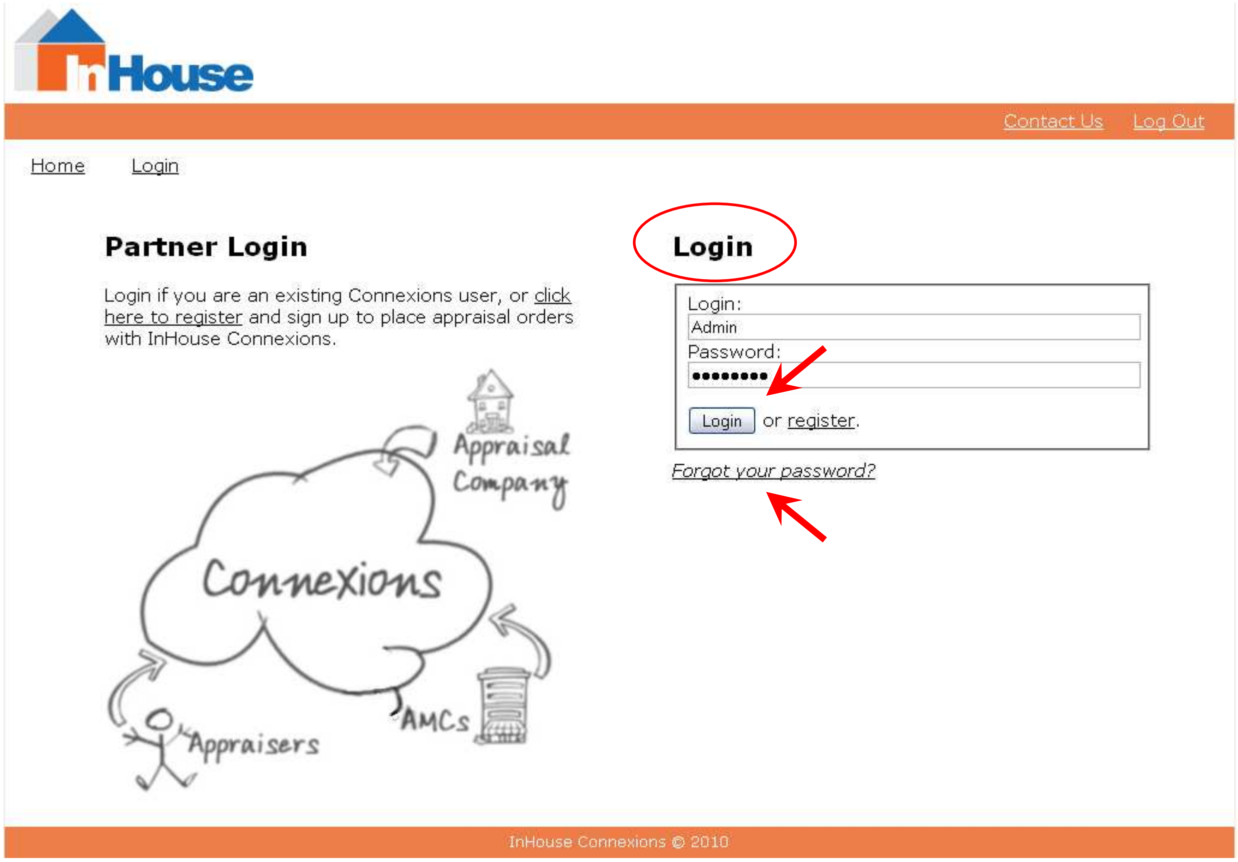
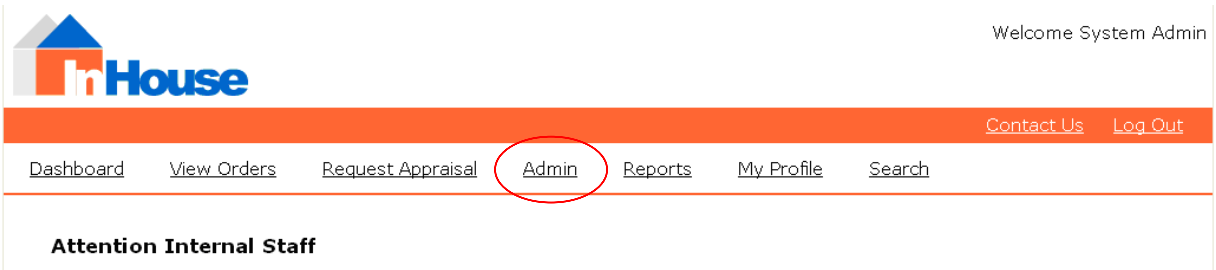
How Do I Add A New Appraiser?

Once on the site, you will see the "**Partner Login**" box (see image below). After entering your login name and password, click the "**Login**" button and you will be taken to the **Dashboard page**.

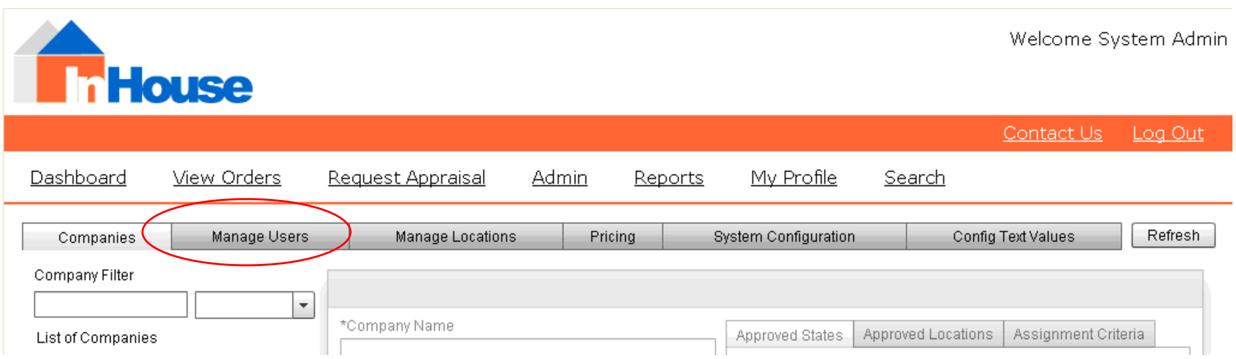


(If you do not know your password or have forgotten it, click on the *Forgot your Password Link*. It will ask for your Login and walk you through how to get a new Password).

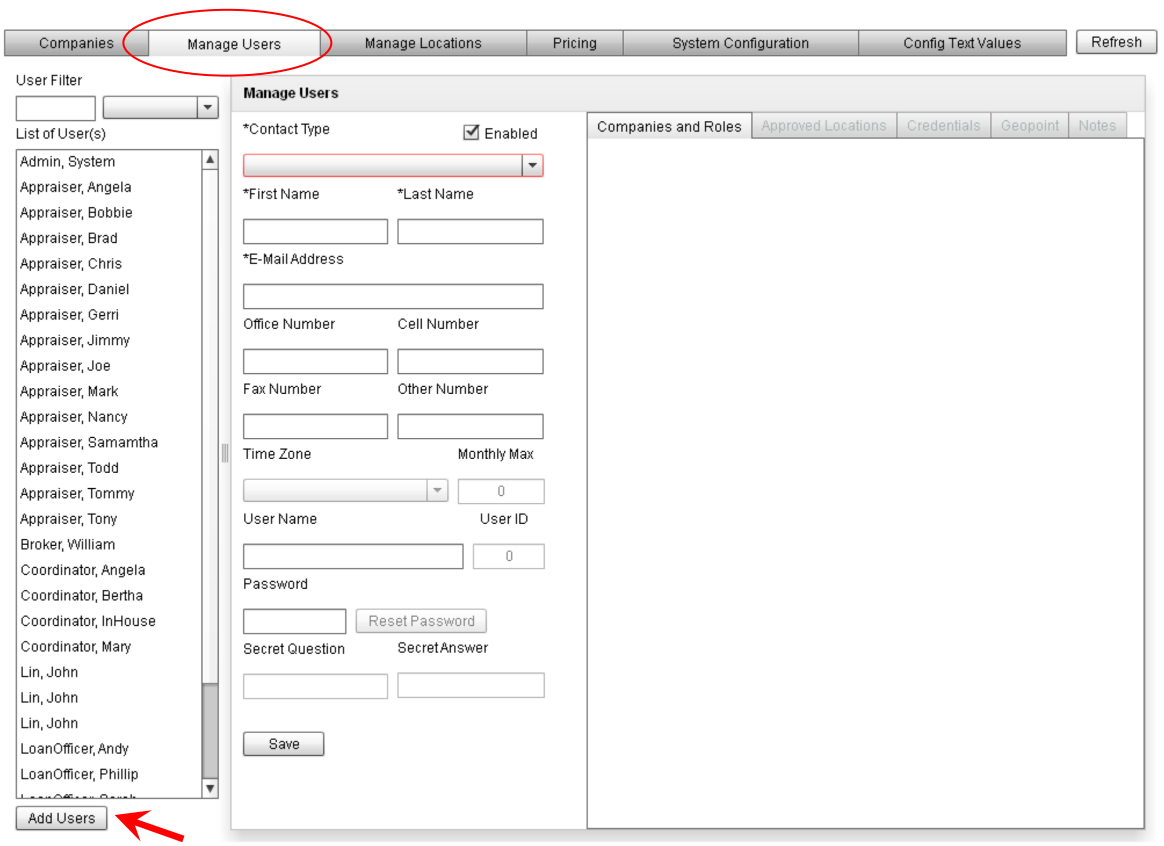
Once you are logged in go to the **“Admin” t**ab:



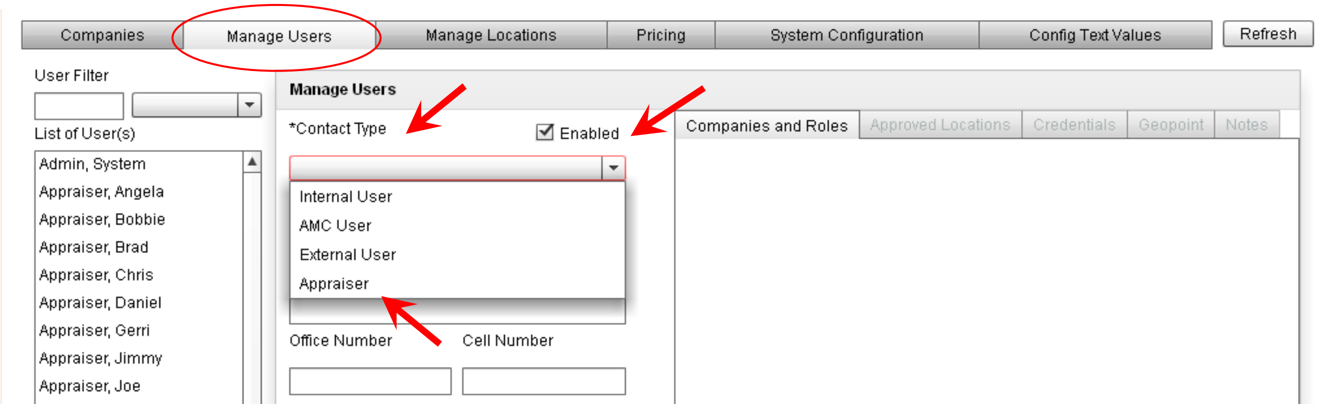
Click on the “**Manage Users”** tab:



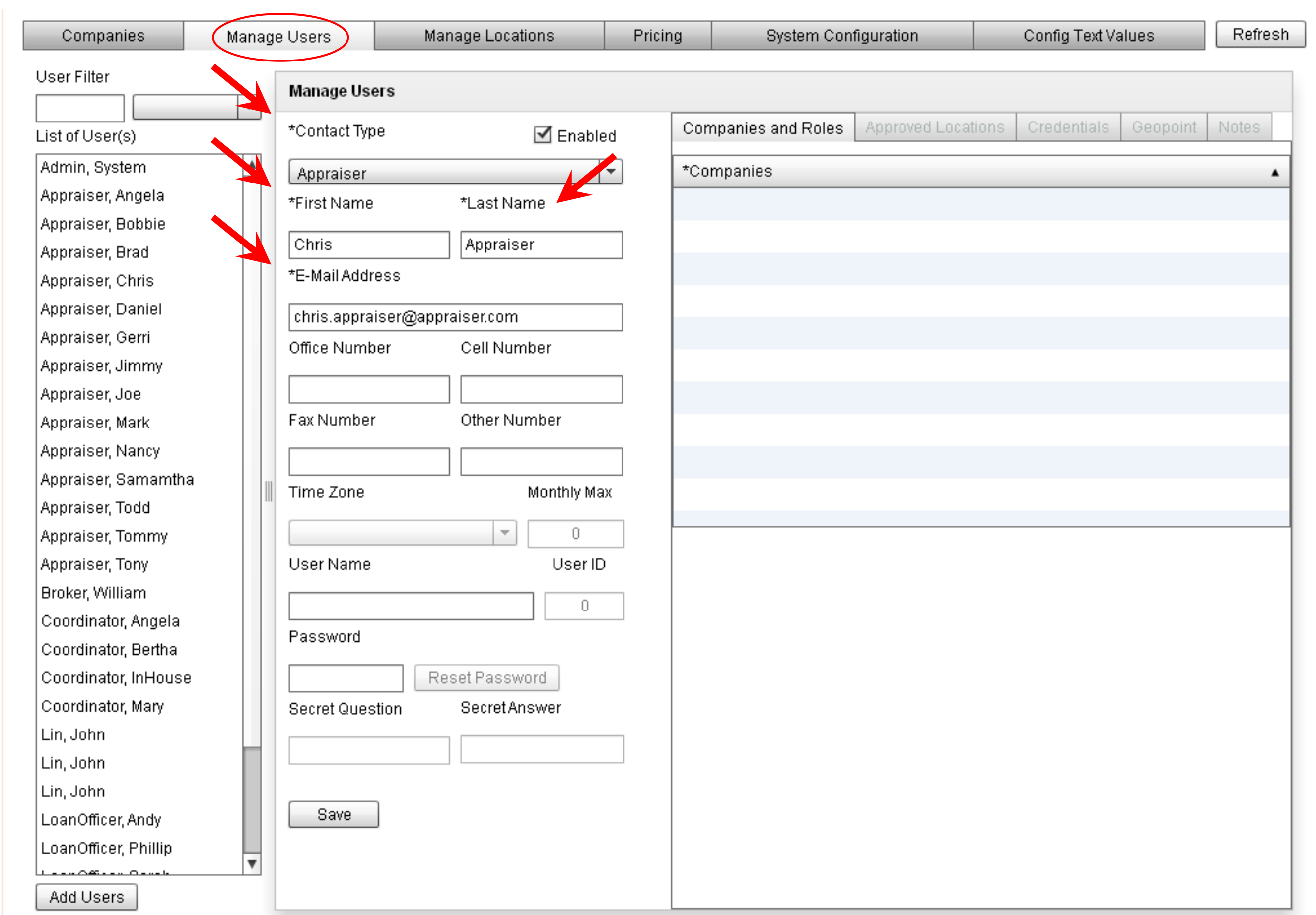
Once you have clicked on manage users click on the **Add Users** button:



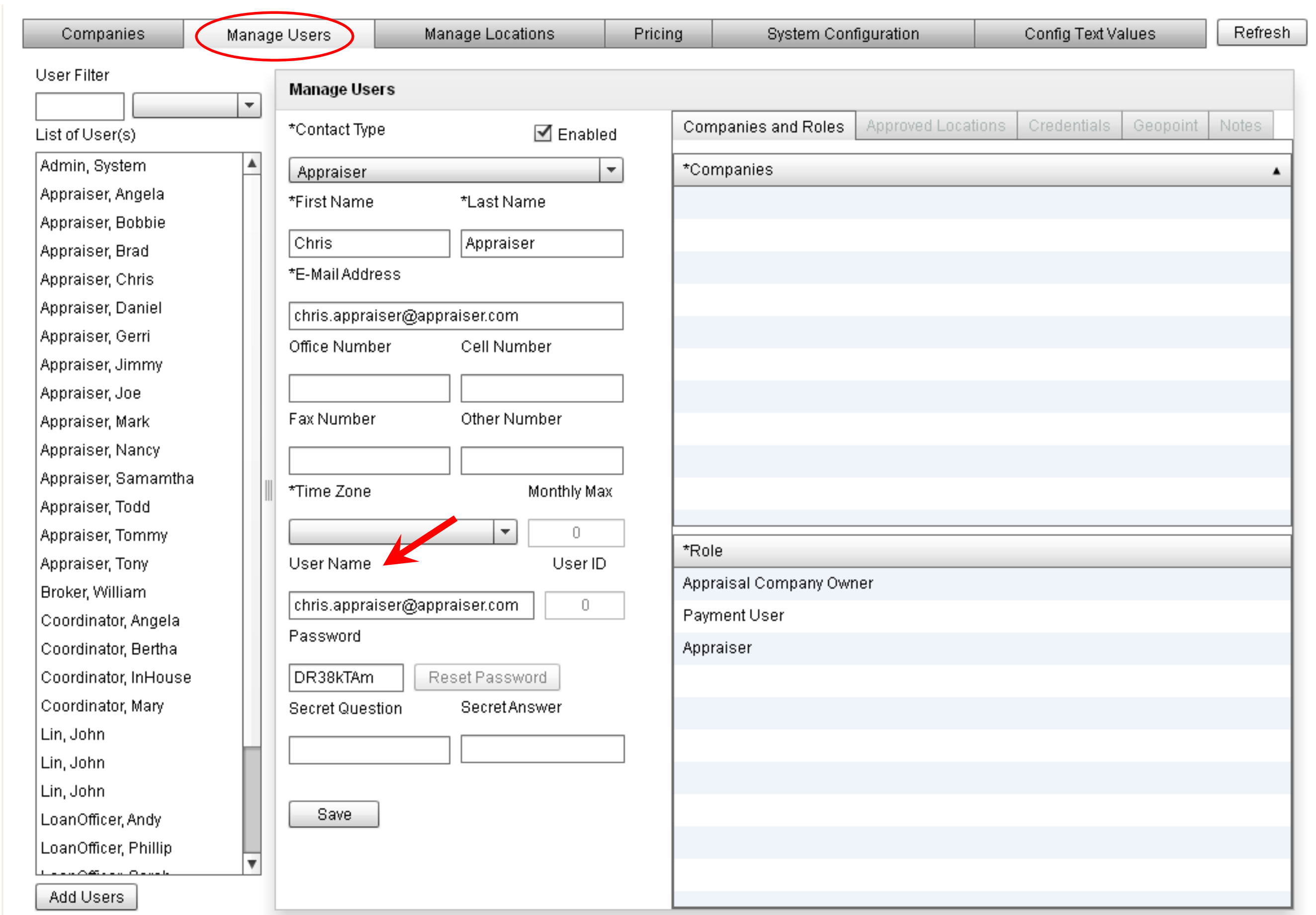
You will then need to fill in the boxes accordingly. You will need to make sure the **Enabled** box is marked and then Click on the ***Contact Type** Drop down to designate that they are an **Appraiser**.



Once you select the **Contact Type** you can then fill in the information. You must enter in all information for fields with a *.



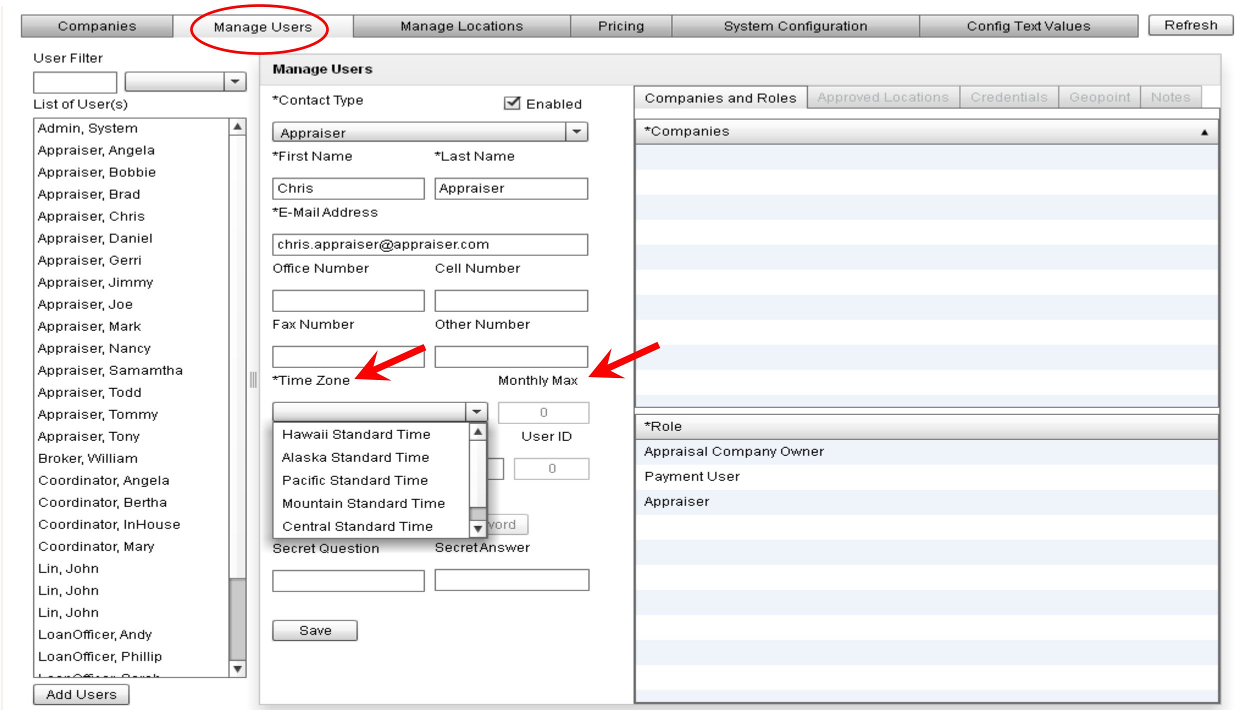
After you enter in the **First Name**, **Last Name** and **e-mail** you will then need to give them a **User Name**: (a suggestion is the e-mail address)



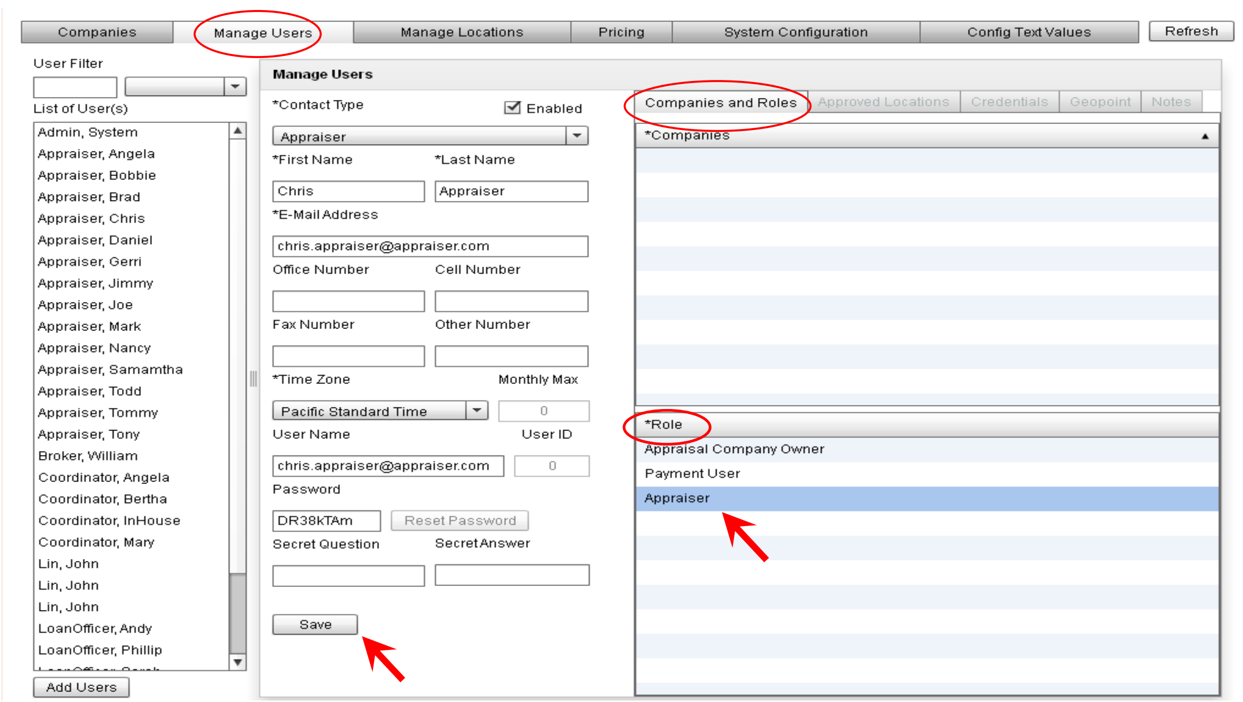
You will notice once you enter in the User Name the Password and Roles will populate. The password can be copied and pasted from here. Please note once you go out of Admin and go back in you will no longer be able to see the password.

Also please note once you have completed adding the new user the system will send them e-mail. The E-mail will provide them with the site address, Login and Password.

You will then need to select a ***Time Zone** and give them a **Monthly Max**.



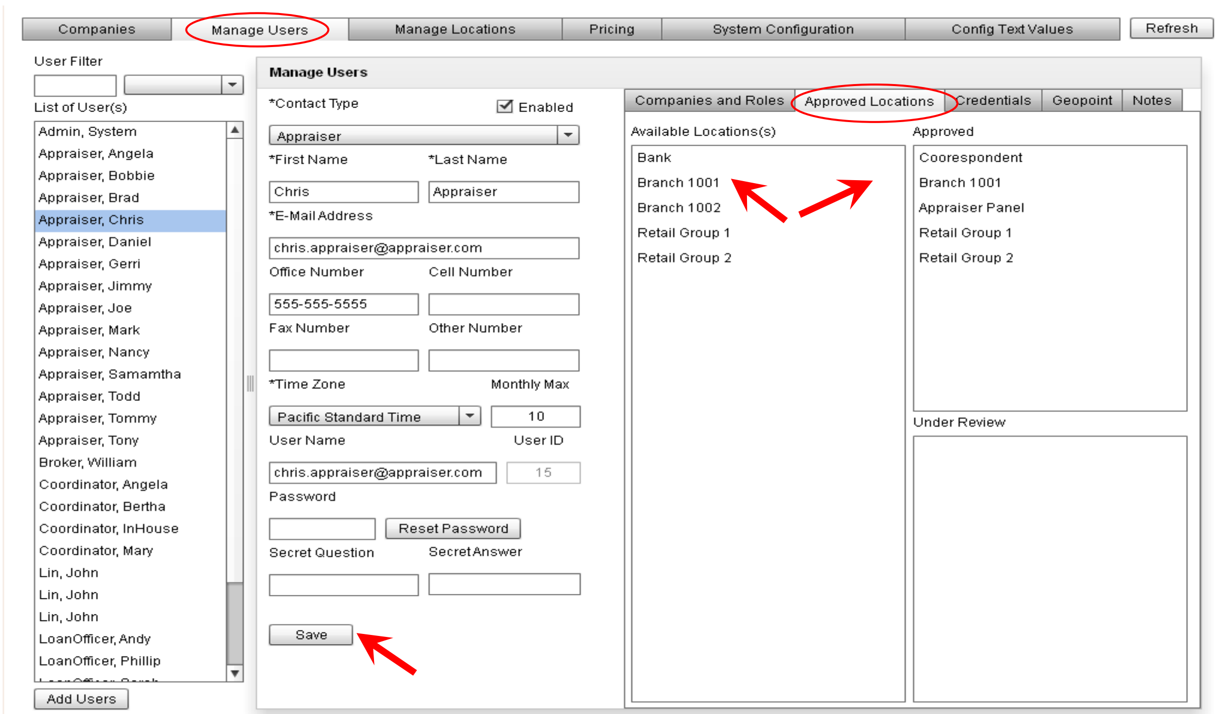
Then you will need to assign the User ***Role**. Please do not select all types as they will cancel each other out.



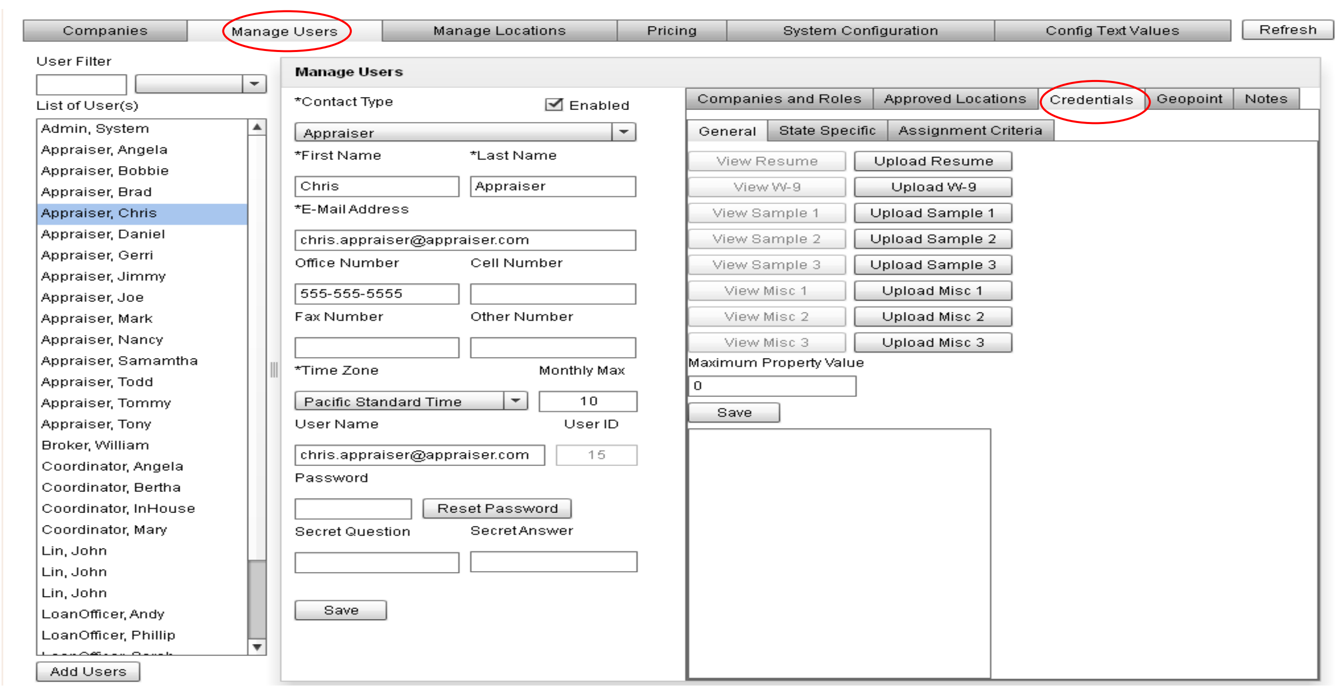
Once you have selected the ***Role** and all the required boxes have been completed, please click on the **Save** button. This will save them as a user and it will prompt the system to send them their login information.

Set up their **Approved Locations**:

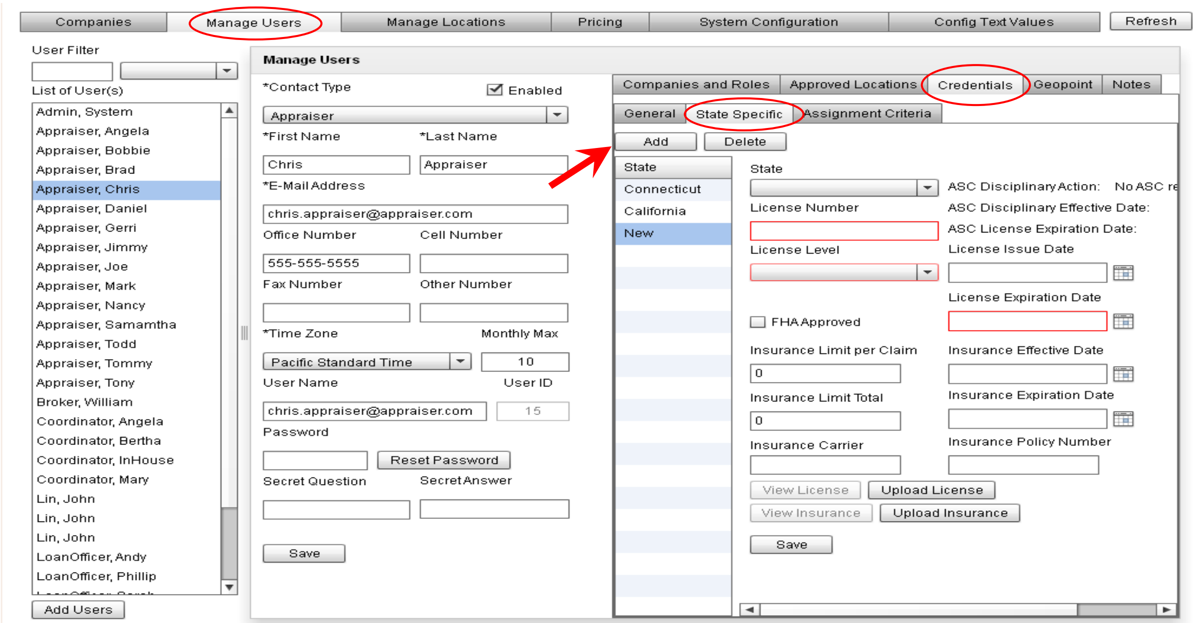
Click on the **Available** Location you want to assign and drag it over to **Approved**. Once you click the **Save** button it will allow them to get work for that branch.



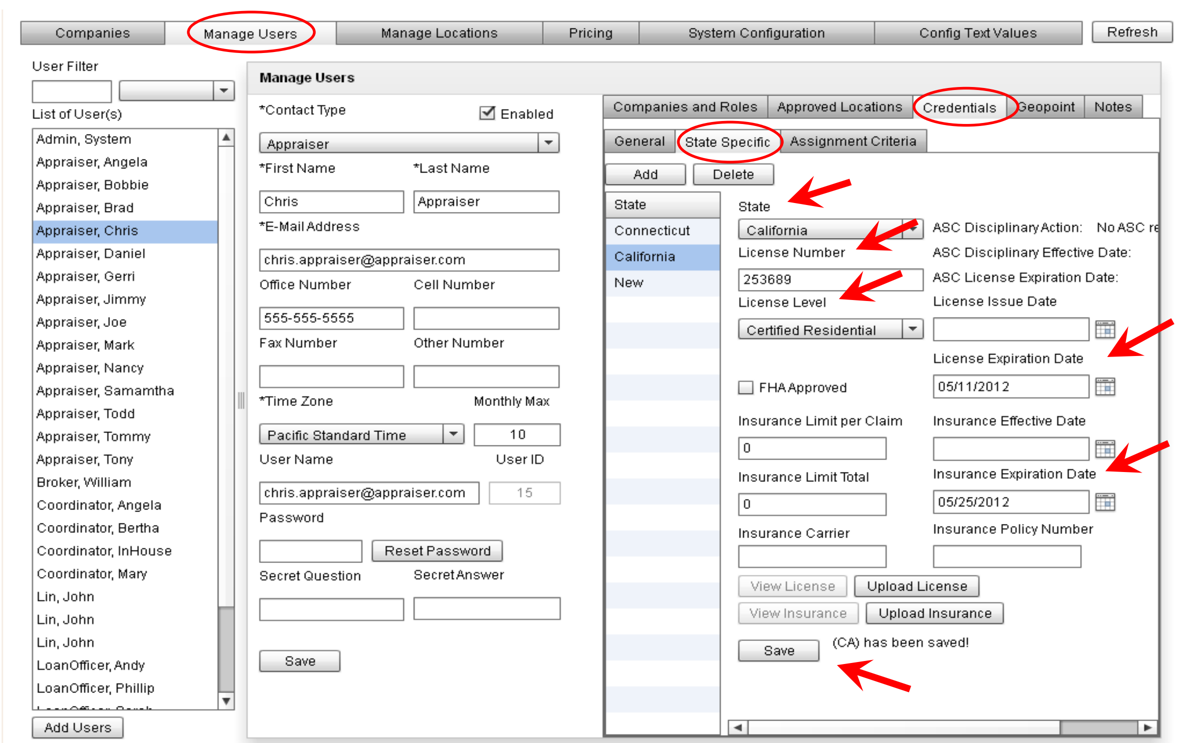
Next, set up their **Credentials**



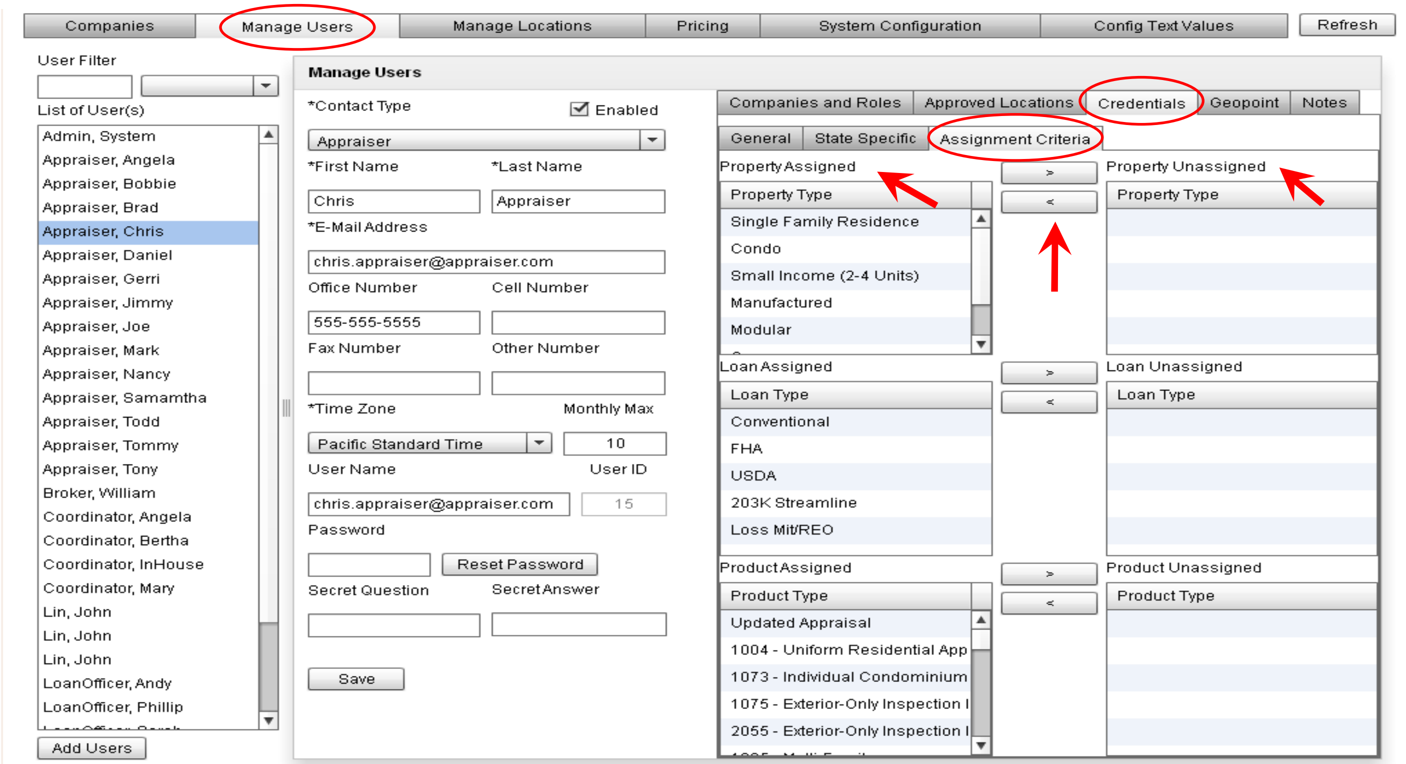
Click the **Add** button to input the **State Specific** information:



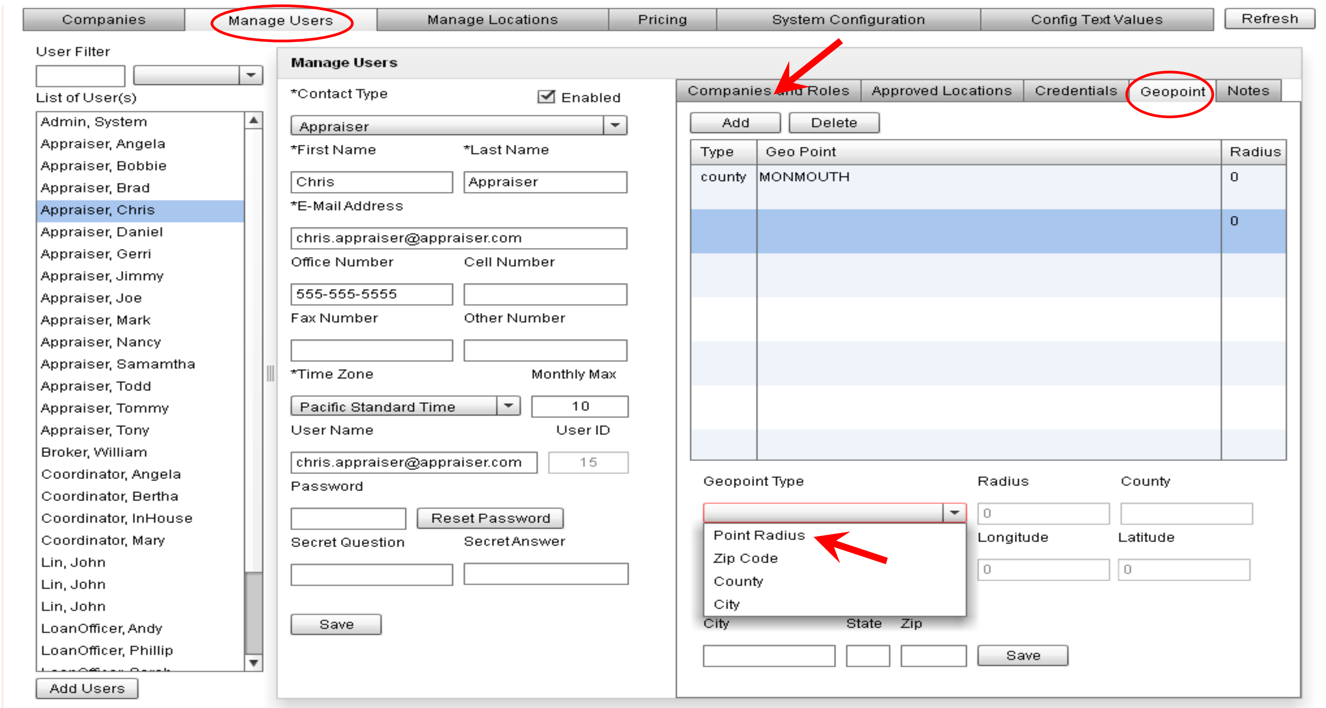
The information required is the **State**, **License Number**, **License Level**, **License Expiration date**, (Check box if the appraiser is **FHA approved)** and the **Insurance Expiration Date.** This system will not allow an appraiser to get an order if this information is missing or if ether one is expired. If you have the information please complete the rest of the information. You can also upload a copy of the Appraisers License and Insurance if you would like. Once you have added all of the information please click on the **Save** button.



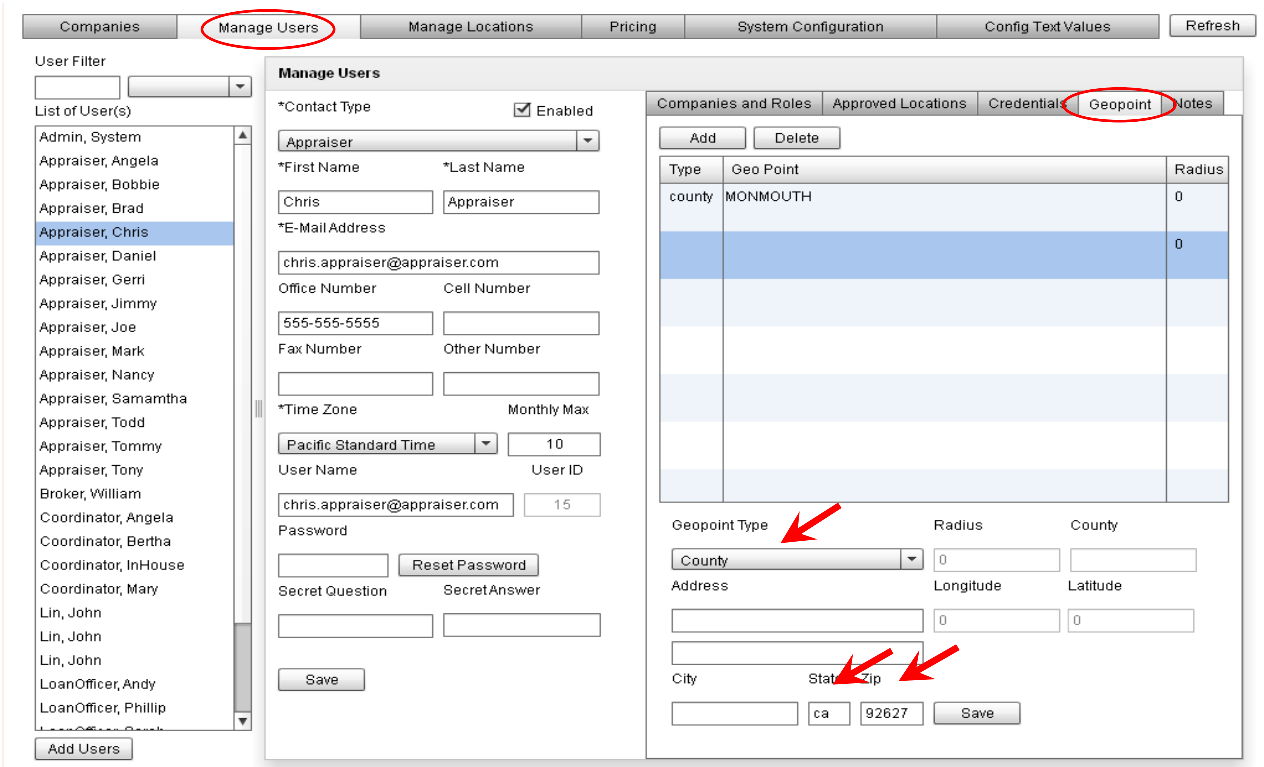
Next, complete the **Assignment Criteria**: You can drag and drop them from the **Property Assigned** to the **Property Unassigned** Boxes or you can use the **< / >**. Click the **Save** button.



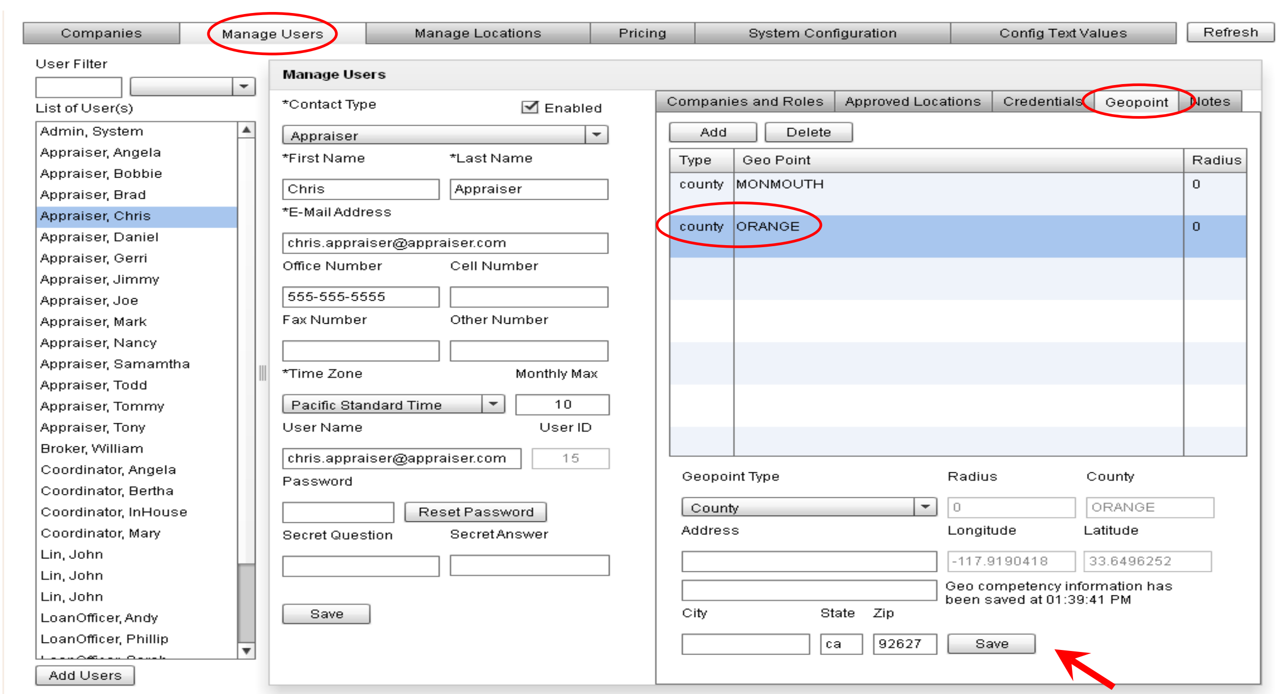
Next, set up the Geopoint: The Geopoint tells the system how to determine if the appraiser is in the correct area to do the appraisal. Once you **click** on the **Add** button you can choose what **Geopoint Type** you want the Appraiser set up with. The choices are **Point Radius** – which is a specific amount of miles from the Appraisers address, **Zip code, County** or **City**. You can only choose one type of Geopoint but you can have several of that type that listed below. As an example this Appraiser is in by County. You can add as many counties as you need for their coverage area.



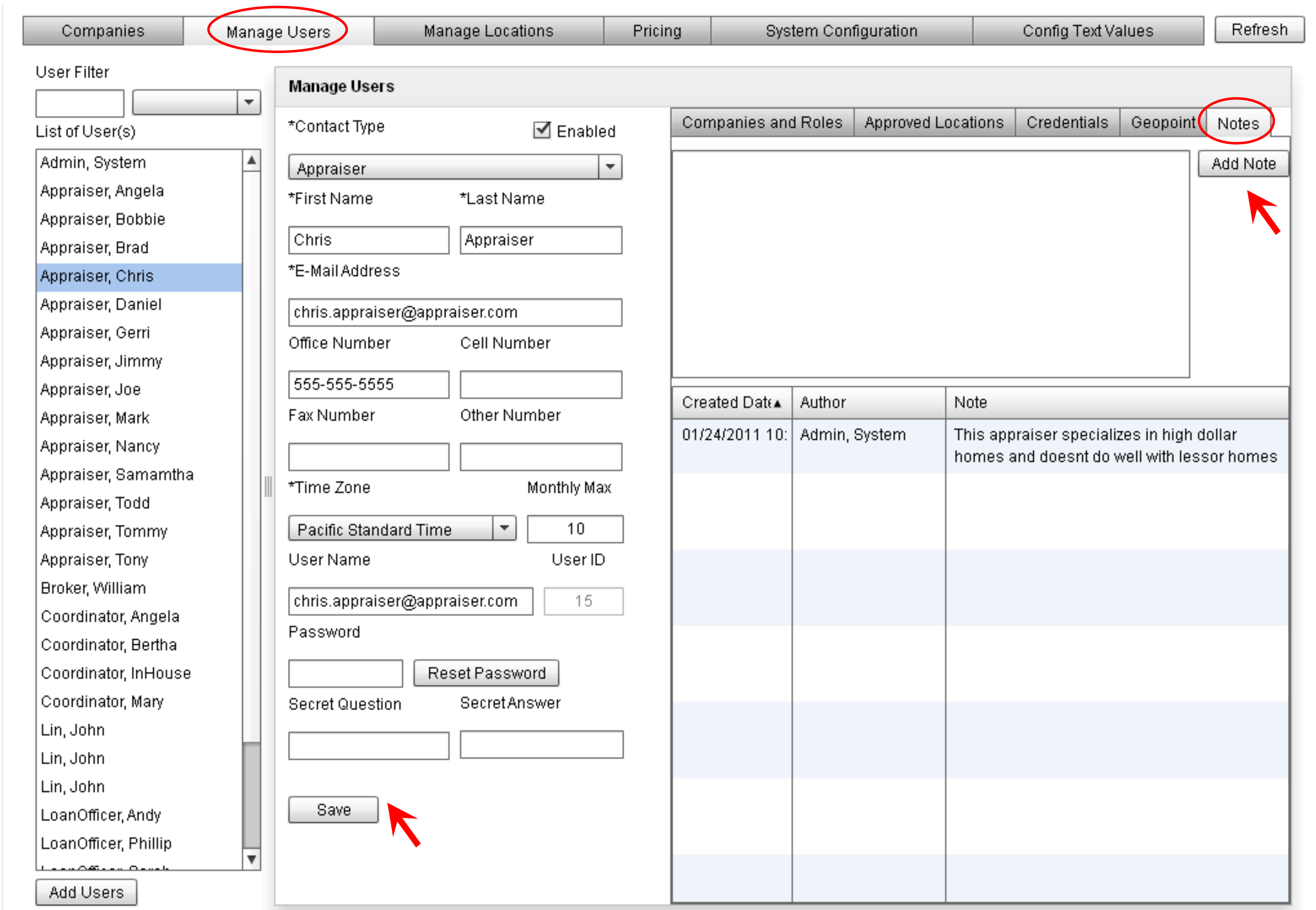
Select **County**, then enter in the **State** and **Zip code**:



Click the **Save** button. It will then populate the information and **show it as one of the Counties**:



If you have any information you would like to keep for your records, you can enter the information into the notes. No one but Users with Admin access can see these Notes:



You can **type in the information** you need and once you click on the **Save** button it will be saved in the system. It will also track the date and time it was entered and by whom.