



Admin New Appraiser Manual

APPRAISAL MANAGEMENT SYSTEM
MANAGE | TRACK | ADD NEW APPRAISER

Questions? Contact:
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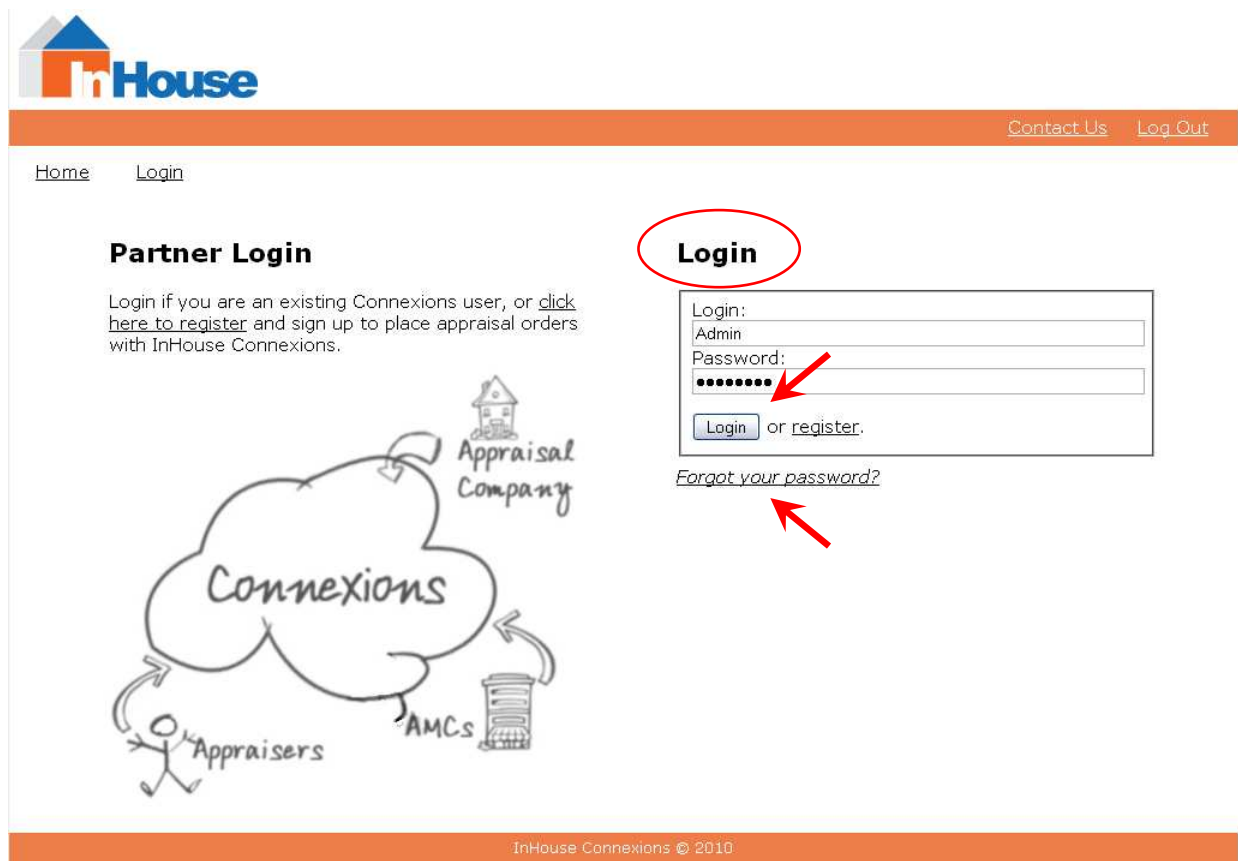


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How Do I Add A New Appraiser?

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**.



Partner Login

Login if you are an existing Connexions user, or [click here to register](#) and sign up to place appraisal orders with InHouse Connexions.

Connexions

Appraisal Company

Appraisers

AMCs

Login

Login:
Admin

Password:
.....

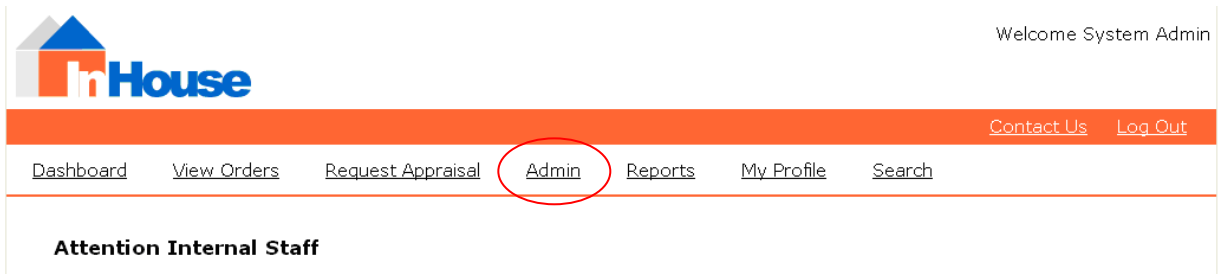
Login or register.

[Forgot your password?](#)

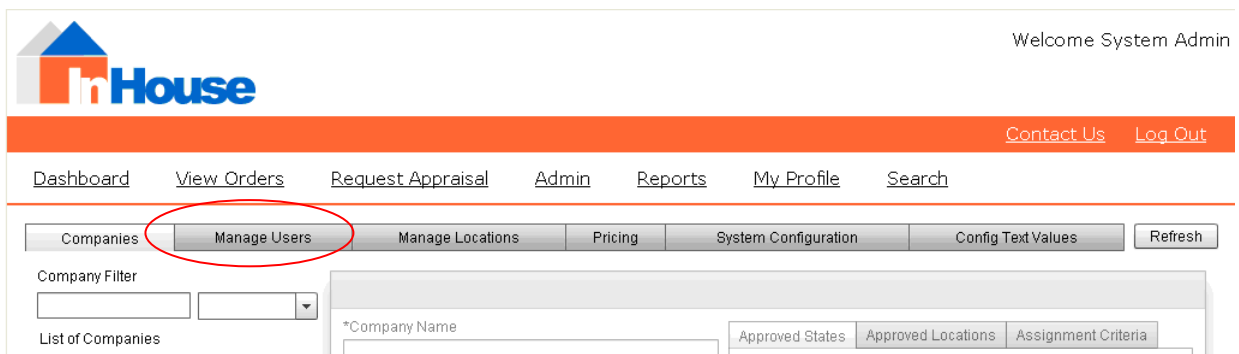
InHouse Connexions © 2010

(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).

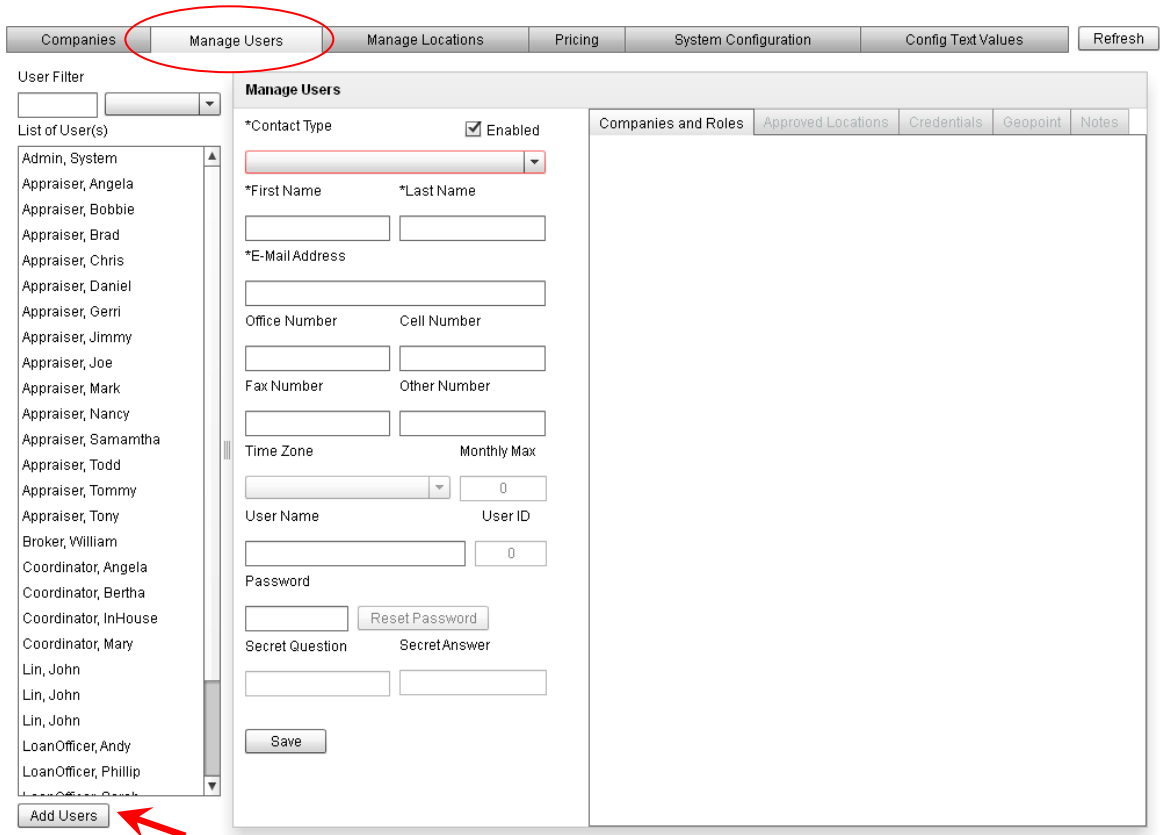
Once you are logged in go to the **“Admin”** tab:



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)

The screenshot shows the 'Manage Users' interface. At the top, there are navigation tabs: 'Companies', 'Manage Users' (circled in red), 'Manage Locations', 'Pricing', 'System Configuration', 'Config Text Values', and 'Refresh'. Below these is a 'User Filter' section with a search box and a dropdown. A 'List of User(s)' scrollable list contains various user roles and names. The main form area is titled 'Manage Users' and includes a 'Companies and Roles' tab. The form fields are as follows:

- *Contact Type: Enabled
- *Appraiser:
- *First Name: *Last Name:
- *E-Mail Address:
- Office Number: Cell Number:
- Fax Number: Other Number:
- *Time Zone: Monthly Max:
- User Name: (indicated by a red arrow) User ID:
- Password:
- Secret Question: Secret Answer:
-

On the right side, there are tabs for 'Companies and Roles', 'Approved Locations', 'Credentials', 'Geopoint', and 'Notes'. The '*Companies' section is currently empty. The '*Role' dropdown is open, showing 'Appraisal Company Owner', 'Payment User', and 'Appraiser'.

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.

The screenshot shows the 'Manage Users' form with the 'Approved Locations' tab selected. On the left, a list of users is shown, with 'Appraiser, Chris' selected. The main form contains fields for user information, including contact type, first and last name, email address, office and cell numbers, fax and other numbers, time zone, and monthly maximum. The 'Approved Locations' tab is active, showing two columns: 'Available Locations(s)' and 'Approved'. The 'Available' column lists 'Bank', 'Branch 1001', 'Branch 1002', 'Retail Group 1', and 'Retail Group 2'. The 'Approved' column lists 'Coorespondent', 'Branch 1001', 'Appraiser Panel', 'Retail Group 1', and 'Retail Group 2'. Red arrows point from the 'Available' column to the 'Approved' column, indicating the process of moving items. A 'Save' button is located at the bottom left of the form, also highlighted with a red arrow.

Next, set up their **Credentials**

The screenshot shows the 'Manage Users' form with the 'Credentials' tab selected. The 'General' sub-tab is active, displaying a grid of buttons for viewing and uploading various documents: 'View Resume', 'Upload Resume', 'View W-9', 'Upload W-9', 'View Sample 1', 'Upload Sample 1', 'View Sample 2', 'Upload Sample 2', 'View Sample 3', 'Upload Sample 3', 'View Misc 1', 'Upload Misc 1', 'View Misc 2', 'Upload Misc 2', and 'View Misc 3', 'Upload Misc 3'. Below this grid is a 'Maximum Property Value' field set to 0. A 'Save' button is located at the bottom of the form.

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 either 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.

The screenshot displays the 'Manage Users' interface. The 'Manage Users' tab is selected and circled in red. On the left, a 'User Filter' dropdown is set to 'Appraiser', and a list of users is shown with 'Appraiser, Chris' selected. The main form for 'Chris' is populated with details such as 'Chris', 'Appraiser', and 'chris.appraiser@appraiser.com'. The 'Assignment Criteria' tab is also circled in red. It features two columns: 'Property Assigned' and 'Property Unassigned'. The 'Property Assigned' column contains a list of property types: Single Family Residence, Condo, Small Income (2-4 Units), Manufactured, and Modular. The 'Property Unassigned' column is currently empty. Red arrows indicate the process of moving 'Single Family Residence' from the 'Property Assigned' column to the 'Property Unassigned' column using the right-pointing arrow (>) between the columns. Other sections like 'Loan Assigned' and 'Product Assigned' are also visible but not the focus of this step.

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.

The screenshot shows the 'Manage Users' interface. The 'Manage Users' tab is selected. On the left, a list of users is shown, with 'Appraiser, Chris' selected. The main form displays details for 'Appraiser, Chris', including contact information, office/phone numbers, and time zone. On the right, the 'Geopoint' configuration is shown. A table lists existing Geopoints, and a 'Geopoint Type' dropdown menu is open, showing options: Point Radius, Zip Code, County, and City. A red arrow points to the 'County' option in the dropdown. The table below shows a Geopoint of Type 'county' for 'MONMOUTH' with a Radius of 0.

Type	Geo Point	Radius
county	MONMOUTH	0
		0

Geopoint Type: **Point Radius** (selected), Zip Code, County, City

Radius: 0, Longitude: 0, Latitude: 0

City: _____ State: _____ Zip: _____ Save

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

Manage Users

*Contact Type Enabled

Appraiser

*First Name *Last Name
Chris Appraiser

*E-Mail Address
chris.appraiser@appraiser.com

Office Number Cell Number
555-555-5555

Fax Number Other Number

*Time Zone Monthly Max
Pacific Standard Time 10

User Name User ID
chris.appraiser@appraiser.com 15

Password

Secret Question Secret Answer

Companies and Roles Approved Locations Credentials **Geopoint** Notes

Add Delete

Type	Geo Point	Radius
county	MONMOUTH	0
		0

Geopoint Type Radius County
County 0

Address Longitude Latitude
0 0

City State Zip
ca 92627

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

Manage Users

*Contact Type Enabled

Appraiser

*First Name *Last Name
Chris Appraiser

*E-Mail Address
chris.appraiser@appraiser.com

Office Number Cell Number
555-555-5555

Fax Number Other Number

*Time Zone Monthly Max
Pacific Standard Time 10

User Name User ID
chris.appraiser@appraiser.com 15

Password

Secret Question Secret Answer

Companies and Roles Approved Locations Credentials **Geopoint** Notes

Add Delete

Type	Geo Point	Radius
county	MONMOUTH	0
county	ORANGE	0

Geopoint Type Radius County
County 0 ORANGE

Address Longitude Latitude
-117.9190418 33.6496252

City State Zip
ca 92627

Geo competency information has been saved at 01:39:41 PM

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:

The screenshot shows the 'Manage Users' interface. At the top, there are navigation tabs: 'Companies', 'Manage Users' (circled in red), 'Manage Locations', 'Pricing', 'System Configuration', 'Config Text Values', and 'Refresh'. On the left, there is a 'User Filter' section and a 'List of User(s)' list. The main area is titled 'Manage Users' and contains a form for user details. The form includes fields for 'Contact Type' (set to 'Appraiser'), 'First Name' (Chris), 'Last Name' (Appraiser), 'E-Mail Address' (chris.appraiser@appraiser.com), 'Office Number' (555-555-5555), 'Time Zone' (Pacific Standard Time), and 'Monthly Max' (10). There are also fields for 'User Name' and 'User ID'. A 'Save' button is located at the bottom of the form, with a red arrow pointing to it. On the right side of the form, there is a 'Notes' section with an 'Add Note' button (circled in red) and a table of existing notes. The table has columns for 'Created Date', 'Author', and 'Note'. One note is visible, dated 01/24/2011 10:00, by Admin, System, with the text 'This appraiser specializes in high dollar homes and doesnt do well with lessor homes'. A red arrow points to the 'Add Note' button.

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.