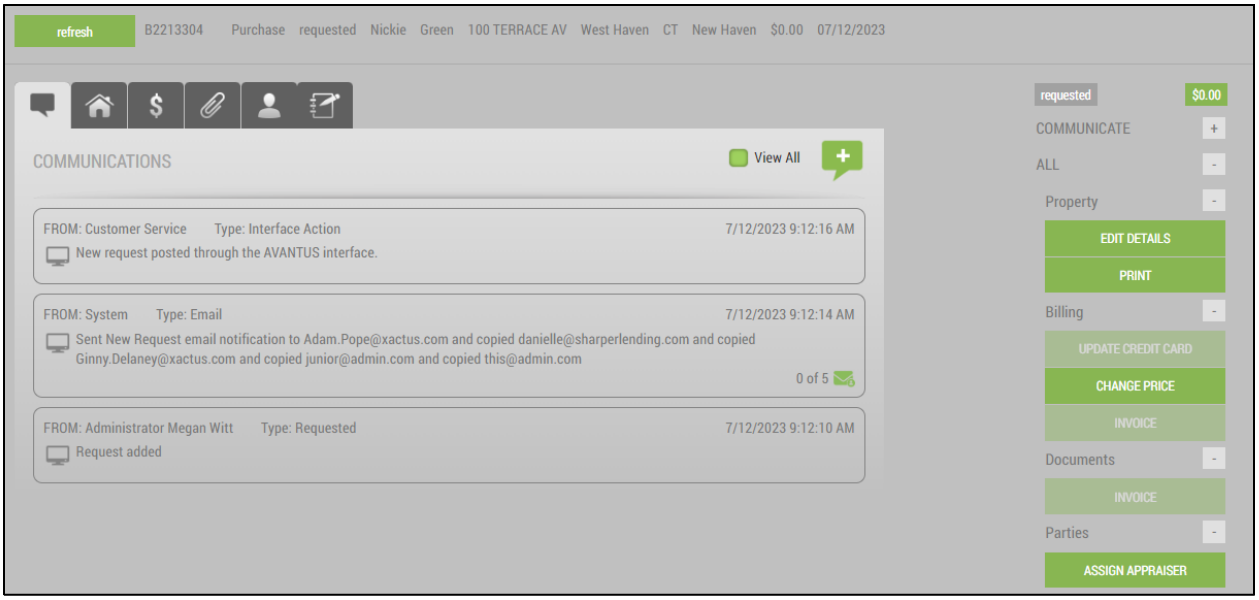
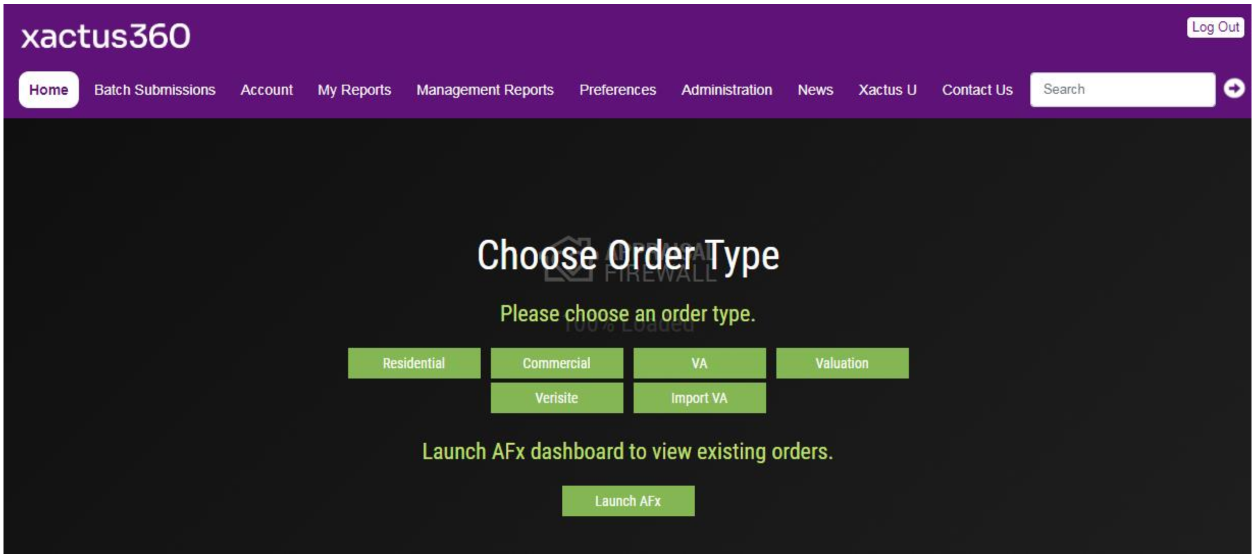
How to Work an AppraisalX Order Within Xactus360

1. Once the AppraisalX is ordered, the Communications Log will appear. Please note some options may be hidden from your view due to different account access.



2. If you want to access the Communications Log from the Xactus360 home page, click Order AppraisalX, then click Launch AFx.



The basic order layout includes tab menus along the top and feature options along the right. You have quick and easy access to the features that will impact the order most depending on the status of the order and tab you are viewing. Some features are only available if they are currently relevant to the order (i.e. you can only access the Dispute feature after a report has been delivered).

- Communications – Displays all messages and all activities that occurred on the order. You can send messages and review past ones from this screen.
- Property Information –This tab contains all details about the subject property such as address, the report ordered, and loan information.
- Billing Details – Displays all accounting activity related to the order (service fees, price changes, receipts, etc.).
- Documents – View, download, and forward all files (purchase contract, credit card authorization, appraiser invoice, etc.) associated with the order. You can print hardcopies of the communication log to go along with the loan file for compliance purposes to prove that no undue appraiser influence occurred.
- Manage Parties – Allows you to view, add, or remove users associated with the order and view the appraiser assigned to the order.
- Notes – Add an order-specific note to the order. You can view the notes managed users have created.

Here are the actions that you can take from the menu at right:

- Edit Details – Users can modify order details such as address, due date, loan number, and appraisal type. Appraisers are notified by email when a change is made to the order.

- Print – View and print the details of the order

- Send Message – Allows the user to send a message to the appraiser, other users on the order, or Customer Service.

- Hold Order/Resume Order – Place the order on hold and limit functionality of all users working on it. Users can still send messages, but the report cannot be uploaded. Using this feature generates an email to the appropriate parties letting them know the status of the order.

- Request Revisions – Only available on completed orders. If the report requires some adjustments (change lender name, adding another comp, etc.) and the value is not being disputed, use this feature to communicate to the appraiser what revisions the report needs.

- Dispute – Only available on completed orders. This feature allows you to add additional comparable sales you would like the appraiser to consider.

- Order 2nd Appraisal – Enables you to order a second appraisal on this property that will automatically be routed to a new appraiser. Use this feature when two appraisals are required for one property – such as an FHA flip. When selected, a New Order screen will appear, with property information automatically populated.

- Order Reinspection – Request for an appraiser's reinspection of the property. This feature generates a new order that will be routed to the same appraiser assigned to the original order. When selected, a New Order screen will appear with property information automatically populated. The form type is defaulted to a 1004D.

- Send to UCDP – Available only on completed orders after UCDP credentials have been entered at the division level. Choose this option to manually submit the uploaded appraisal report to UCDP.

- Send Status – Only available to Administrators on orders that are in a post-delivery status of Revisions Requested, Corrections Required, or Disputing in which the Administrator can set the order to done.

- Cancel Order – This cancels the appraisal order. Cancellation/Trip fees may apply.

- Print Communications Log – View and download the details of the Communications log.

- Run Scorecard – Submit completed reports to a third-party automated review (additional fees will apply). Contact your account manager to have this feature enabled.

- Send to FHA EAD – Available only on completed orders after EAD credentials have been entered at the division level. Choose this option to manually submit the uploaded appraisal report to the EAD portal.

- Update Credit Card – Change the credit card information that was previously used to place a credit card order.

- Change Price – Use this feature to increase the price of an order, respond to an appraiser's price change request, or request a price decrease from the appraiser.

- Invoice – Displays all costs involved in this appraisal order and to whom they should be remitted. This includes an itemized list of applicable technology transaction fees, appraisal fees, and billing service fees.

- Assign Appraiser (Administrators only) – You can assign this appraisal order to an appraiser of your choice. Select Assign Appraiser to display a list of eligible appraisers for this property. You can assign the order to an appraiser within your panel, Lender Panel (if you have more than one division) or select one from the All Appraisers list. If you have an AMC enabled on your division, you will also see AMCs within the drop-down as an available option to assign the order.

- Assign Reviewer – Assign/view the user acting as a manual reviewer (only available if manual review feature is enabled).

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.