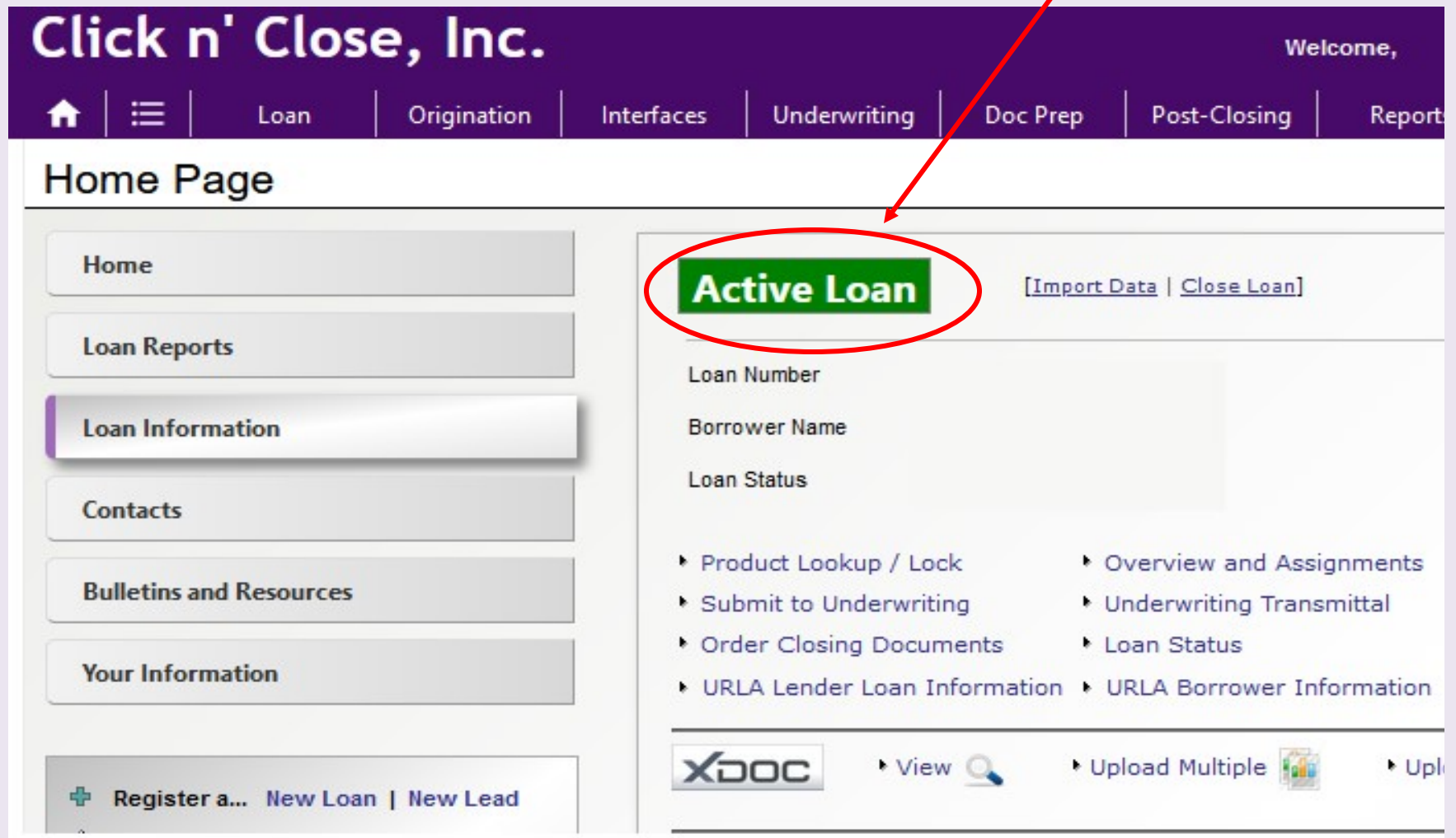




Click n' Close™, Inc.
Mortgage

HOW TO
ORDER AN
APPRAISAL IN
MORTGAGE
MACHINE

**Step 1: Open the specific loan for the appraisal request.
Make sure the screen states “Active Loan.”**



Click n' Close, Inc. Welcome,

Home | Loan | Origination | Interfaces | Underwriting | Doc Prep | Post-Closing | Report

Home Page

[Home](#)
[Loan Reports](#)
[Loan Information](#)
[Contacts](#)
[Bulletins and Resources](#)
[Your Information](#)

Active Loan [\[Import Data\]](#) [\[Close Loan\]](#)


Loan Number


Borrower Name

Loan Status

[Product Lookup / Lock](#)
[Submit to Underwriting](#)
[Order Closing Documents](#)
[URLA Lender Loan Information](#)

[Overview and Assignments](#)
[Underwriting Transmittal](#)
[Loan Status](#)
[URLA Borrower Information](#)

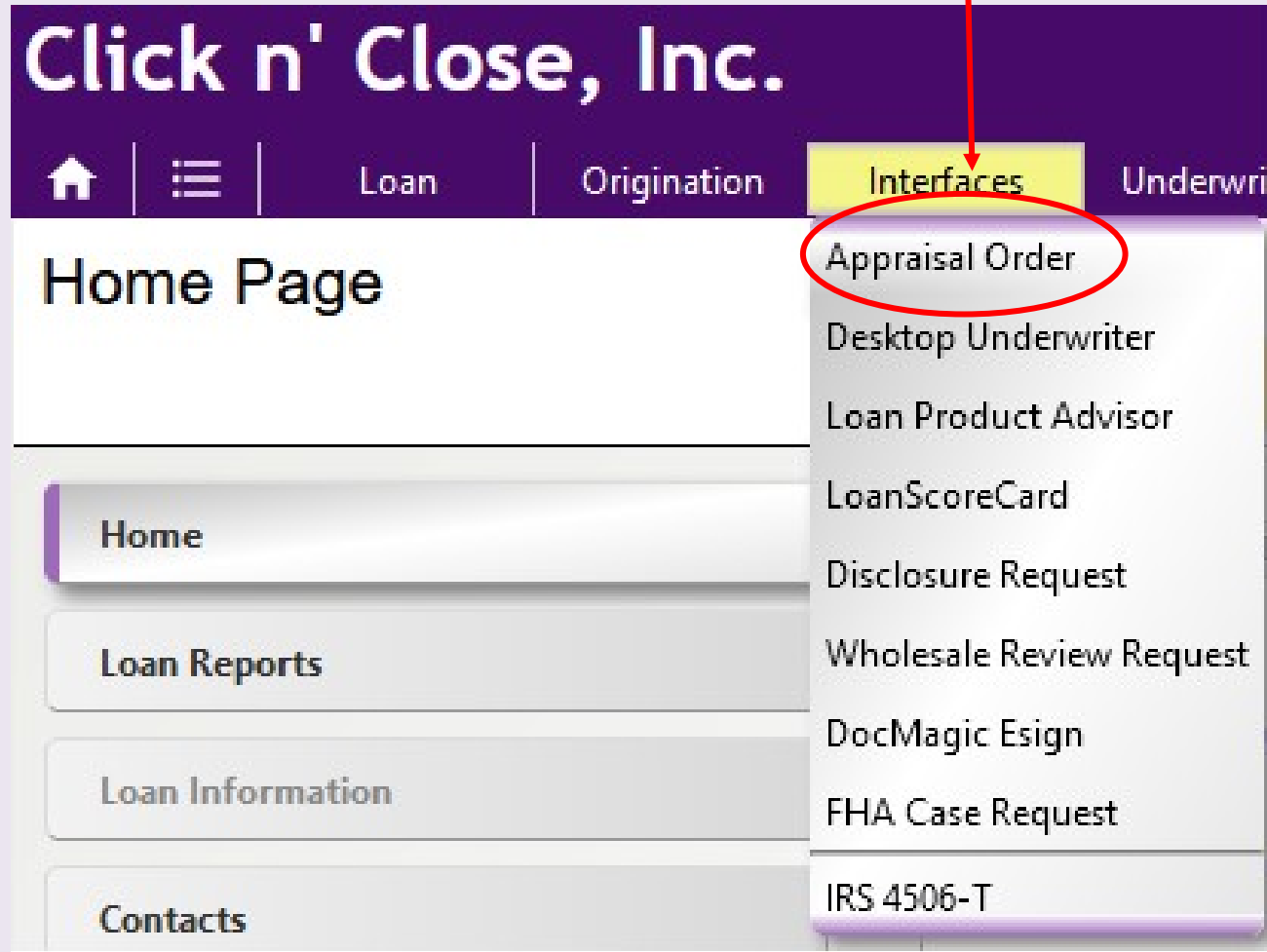
XDOC [View](#) 

[Upload Multiple](#) 

[Uplo...](#)

[+ Register a...](#) [New Loan](#) | [New Lead](#)

Step 2: Click on the Interfaces tab. A drop down will appear. Click on Appraisal Order.



Step 3: The Appraisal Order page should open. Please fill in the order with the requested information.

Appraisal Order			
Property	Property Address	111	
	City / State / Zip	dallas	TX ▼ 77777
	County		
	Legal Description		
	Acreage	▼	
	Property Type	▼	
	Estate Held In...	▼	
Borrowers	Agency Case Number		
	Borrower Name	test	test
	Co-Borrower Name		
	Borrower Home Phone		
	Borrower Work Phone		
	Borrower Email		
	Contact Information	<input type="checkbox"/> Borrower will be the contact for entry	
	Entry Contact Person		
	Entry Contact Phone		
	Entry Contact Email		
	Originator's Contact	▼	

Make sure that you have requested the agency case number if an FHA loan.

Step 4: Select the correct type of appraisal needed for the mortgage product submitted in Mortgage Machine.


Appraisal Form(s)

- ☐ Conv 1004 - Uniform Residential Appraisal Report - Interior and Exterior Inspection
- ☐ Conv 1004C - Manufactured Home
- ☐ Conv 1004D - Final Inspection
- ☐ Conv 1025 - Small Residential Income Property Appraisal Report
- ☐ Conv 1073 - Individual Condominium Unit Appraisal Report
- ☐ FHA 1004
- ☐ FHA 1004C - Manufactured Home
- ☐ FHA 1004D - Final Inspection
- ☐ FHA 1025
- ☐ FHA 1073
- ☐ USDA 1004 - Appraisal (FNMA 1004)
- ☐ USDA 1073 - Condo Appraisal (FNMA 1073)
- ☐ VA Appraisal
- ☐ Comparable Rent Schedule
- ☐ Operating Income Statement (needed if counting rental income for the subject)

Additional Notes

XDoc Images

No documents have been added.

 [Upload New Documents](#)

Order the Appraisal

Step 5: Please upload the sales contract if the transaction is a Purchase (or any additional documents needed by appraiser).


Appraisal Form(s)

- ☐ Conv 1004 - Uniform Residential Appraisal Report - Interior and Exterior Inspection
- ☐ Conv 1004C - Manufactured Home
- ☐ Conv 1004D - Final Inspection
- ☐ Conv 1025 - Small Residential Income Property Appraisal Report
- ☐ Conv 1073 - Individual Condominium Unit Appraisal Report
- ☐ FHA 1004
- ☐ FHA 1004C - Manufactured Home
- ☐ FHA 1004D - Final Inspection
- ☐ FHA 1025
- ☐ FHA 1073
- ☐ USDA 1004 - Appraisal (FNMA 1004)
- ☐ USDA 1073 - Condo Appraisal (FNMA 1073)
- ☐ VA Appraisal
- ☐ Comparable Rent Schedule
- ☐ Operating Income Statement (needed if counting rental income for the subject)

Additional Notes

XDoc Images

No documents have been added.

 [Upload New Documents](#)

Order the Appraisal

Step 6: Once steps 1-5 have been completed, click on the “Order the Appraisal” tab at the bottom left of the page.


Appraisal Form(s)

- ☐ Conv 1004 - Uniform Residential Appraisal Report - Interior and Exterior Inspection
- ☐ Conv 1004C - Manufactured Home
- ☐ Conv 1004D - Final Inspection
- ☐ Conv 1025 - Small Residential Income Property Appraisal Report
- ☐ Conv 1073 - Individual Condominium Unit Appraisal Report
- ☐ FHA 1004
- ☐ FHA 1004C - Manufactured Home
- ☐ FHA 1004D - Final Inspection
- ☐ FHA 1025
- ☐ FHA 1073
- ☐ USDA 1004 - Appraisal (FNMA 1004)
- ☐ USDA 1073 - Condo Appraisal (FNMA 1073)
- ☐ VA Appraisal
- ☐ Comparable Rent Schedule
- ☐ Operating Income Statement (needed if counting rental income for the subject)

Additional Notes

XDoc Images

No documents have been added.

 [Upload New Documents](#)

Order the Appraisal

Step 7: After clicking “Order the Appraisal” tab, you should see the following example. This is a review of the order, so please look it over.

The screenshot shows a web application interface for reviewing an appraisal order. At the top is a navigation bar with tabs: Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, Reports, and a settings gear icon. The date and time 'Wednesday, September 6, 2017 8:16:58 AM (885)' are displayed on the right. Below the navigation bar is the 'Appraisal Order' header. A sidebar on the left contains a purple 'Open Loan' button and links for 'Close Loan' and 'Import Data'. The main content area displays loan details: Loan Number 2002131248 (ACTIVE LOAN), Borrower Name SCENARIO, TEST, Property Address 123 W MAIN, GILBERTS, IL 60136, Loan Status Loan Originated, and Business Channel Correspondent Mini. A section titled 'Please review and confirm the order information:' contains an 'Appraisal Order Review' table. This table is divided into two columns: 'Property' and 'Borrowers / Contact Information'. The 'Property' column lists details like Property Address, City/State/Zip, County, Legal Description, Acreage, Property Type, Estate Held In..., Agency Case Number, Appraisal Form(s), Comparable Rent Schedule?, Operating Income Statement?, and Additional Notes. The 'Borrowers / Contact Information' column lists Borrower Name, Borrower Home Phone, Borrower Work Phone, Borrower Email, Borrower will be the contact for entry?, Contact Information (Contact Person, Contact Phone, Contact Email), Originator's Contact, Loan Information (Estimated Value Range, Loan Purpose, Occupancy Status), and XDoc Images. At the bottom, a 'Payment Information' section includes fields for Credit Card Number, CVV Security Code, Card Holder's Name, and Expiration Date, along with instructions for where to find the CVV and cardholder name.

Wednesday, September 6, 2017 8:16:58 AM (885)

Appraisal Order

Home Save Reload

Open Loan

Close Loan Import Data

Loan Number: 2002131248 **ACTIVE LOAN** Property Address: 123 W MAIN, GILBERTS, IL 60136
Borrower Name: SCENARIO, TEST Loan Status: Loan Originated
Business Channel: Correspondent Mini

Please review and confirm the order information:

Appraisal Order Review	
Property	Borrowers / Contact Information
Property Address: 123 W MAIN	Borrower Name: TEST SCENARIO
City/State/Zip: GILBERTS IL 60136	Borrower Home Phone: 333333333
County: tbd	Borrower Work Phone: 333333333
Legal Description:	Borrower Email:
Acreage: Less than 1 acre	Borrower will be the contact for entry? No
Property Type: Detached	Contact Information
Estate Held In...: Fee Simple	Contact Person: 3
Agency Case Number: 12345678	Contact Phone: 3
Appraisal Form(s)	Contact Email: 3
Comparable Rent Schedule? No	Originator's Contact
Operating Income Statement? No	Loan Information
Additional Notes	Estimated Value Range
	Loan Purpose: Purchase
	Occupancy Status: Primary Residence
	XDoc Images
	No documents have been added.
	Upload New Documents

Payment Information

Credit Card Number:

CVV Security Code:

Card Holder's Name:

Expiration Date:

From the back of the card.

As displayed on the card.

Step 8: Payment of the appraisal. Either input the credit card info below (card will not be charged until the appraisal is received by CNC) OR...Check the box to process the order without cc authorization and a link goes to the borrower to enter their payment info.

The screenshot shows a web application interface for processing an appraisal order. The top navigation bar includes links for Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, Reports, and a settings icon. The main content area is divided into two columns. The left column contains fields for Property Type (Detached), Estate Held In... (Leasehold), Agency Case Number, Appraisal Form(s), Comparable Rent Schedule? (No), Operating Income Statement? (No), and Additional Notes. The right column contains fields for Borrower Email (james.cassinelli@mmachine.net), Borrower will be the contact for entry? (No), Contact Information (Contact Person, Contact Phone, Contact Email), Originator's Contact, Loan Information (Estimated Value Range, Loan Purpose: Purchase, Occupancy Status: Primary Residence), and Scanned Images (No documents have been added, Upload New Documents). Below these columns is the Payment Information section, which includes fields for Credit Card Number, CVV Security Code, Card Holder's Name, Expiration Date, Billing Address, City/State/Zip, and Authorization Code. A checkbox labeled 'Accept without obtaining credit card approval' is highlighted in yellow. A red arrow points from the top right towards this checkbox. At the bottom, there are two buttons: 'Confirm the Appraisal Order' and 'Go Back and Edit the Order'.

Payment Information

Card Holder's Billing Address

Credit Card Number

CVV Security Code

Card Holder's Name

Expiration Date

Billing Address

City/State/Zip

Authorization Code

☒ Accept without obtaining credit card approval.

From the back of the card.
As displayed on the card.

If necessary.

Confirm the Appraisal Order | Go Back and Edit the Order

Step 9: Once the credit card info is filled in (OR the box was checked to process without cc authorization), please click the “Confirm the Appraisal Order” tab.

Property

Property Address: 123 W MAIN
City/State/Zip: GILBERTS IL 60138
County: tbd
Legal Description:
Acreage: Less than 1 acre
Property Type: Detached
Estate Held In...: Fee Simple
Agency Case Number: 12345678

Appraisal Form(s)

Comparable Rent Schedule? No
Operating Income Statement? No

Additional Notes

Borrowers / Contact Information

Borrower Name: TEST SCENARIO
Borrower Home Phone: 333333333
Borrower Work Phone: 333333333
Borrower Email:
Borrower will be the contact for entry? No

Contact Information

Contact Person: 3
Contact Phone: 3
Contact Email: 3

Originator's Contact

Loan Information

Estimated Value Range:
Loan Purpose: Purchase
Occupancy Status: Primary Residence

XDoc Images

No documents have been added.
[Upload New Documents](#)

Payment Information

Credit Card Number:
CVV Security Code: From the back of the card.
Card Holder's Name: As displayed on the card.
Expiration Date:
Card Holder's Billing Address:
City/State/Zip:
Authorization Code: If necessary.

Confirm the Appraisal Order **Go Back and Edit the Order**

Mortgage Machine -Appraisal order will be processed.
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***To check status, please go to the next page for appraisal status info.**

- Step 1: Open up the loan file in Mortgage Machine.**
- Step 2: Once the file is open and Active, click the Interfaces tab at the top of the page.**
- Step 3: Please select/click on the “Appraisal Order” tab.**

How to locate the appraisal report

Step 1: Open the loan file in Mortgage Machine.

The screenshot displays the 'Click n' Close, Inc.' web application interface. The top navigation bar is purple with white text for 'Click n' Close, Inc.', 'Welcome,' and 'Site Map'. Below this is a secondary navigation bar with links: Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, and Reports. The main content area is titled 'Home Page' and features a sidebar on the left with buttons for 'Home', 'Loan Reports', 'Loan Information' (highlighted), 'Contacts', 'Bulletins and Resources', and 'Your Information'. The main panel shows an 'Active Loan' section with a green header and links for '[Import Data]' and '[Close Loan]'. It lists fields: 'Loan Number', 'Borrower Name', 'Loan Status', 'Estimated Close Date', 'Estimated Funding Date', and 'Business Channel'. Below these are several expandable sections: 'Product Lookup / Lock', 'Submit to Underwriting', 'Order Closing Documents', 'URLA Lender Loan Information', 'Overview and Assignments', 'Underwriting Transmittal', 'Loan Status', 'URLA Borrower Information', 'Pipeline and Loan', and 'Reporting'. At the bottom, there is a yellow 'XDOC' tab with a 'View' button and a magnifying glass icon, which is highlighted by a red arrow. Other buttons include 'Upload Multiple' and 'Upload in XDoc [Manager]'.

-Step 2: Click on the XDOC View tab.

Step 3: Once XDOC is open, look for the “Property” tab.

The screenshot displays the XDOC Viewer interface. The top header shows 'X Viewer | Loan Documents'. Below this is a toolbar with various icons for document navigation and viewing. The left sidebar contains a list of document tabs, with 'Property' highlighted. The main viewing area shows a preview of the selected document, which is an appraisal, with the word 'APPRAISAL' visible in the top right corner.

X Viewer | Loan Documents

default view

single page

1

Property 12

- Property - Sales Contract** 22 p
7/26/2022 6:30 AM
Description:
- Property - Flood Certificate** 1 p
7/26/2022 8:13 AM
Description:
- Property - FHA EAD Report** 2 p
8/11/2022 10:24 AM
Description:
- Property - Appraisal** 27 p
8/11/2022 10:24 AM
Description:

APPRAISAL

Step 4: Under the “Property” tab, you should be able to locate the appraisal report. Click here to open the appraisal report.

The screenshot shows the 'X Viewer | Loan Documents' interface. On the left, a sidebar lists documents under the 'Property' tab (12 items). The documents are:

- Property - Sales Contract (22 p, 7/26/2022 6:30 AM)
- Property - Flood Certificate (1 p, 7/26/2022 8:13 AM)
- Property - FHA EAD Report (2 p, 8/11/2022 10:24 AM)
- Property - Appraisal (27 p, 8/11/2022 10:24 AM)** (highlighted in orange)

A red arrow points from the text 'Click here to open the appraisal report.' to the 'Property - Appraisal' document. The main area shows a preview of the selected document, which is titled 'APPRAISAL'.

Contact your AE for further support.