



Click n' Close™, Inc.
Mortgage

HOW TO
ORDER AN
APPRAISAL IN
MORTGAGE
MACHINE
(Optional AMC's)

Click n Close, Inc. - 3 options for ordering your appraisal

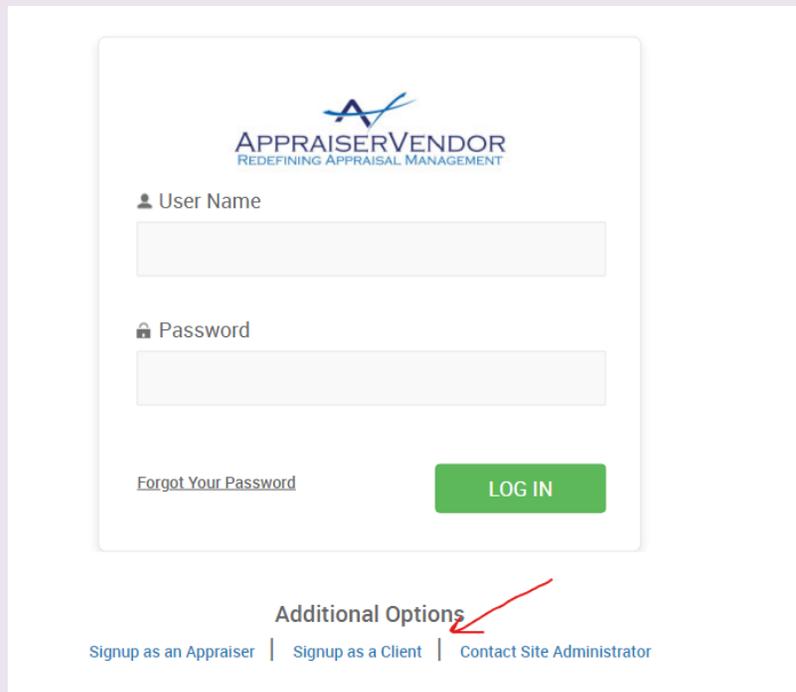
- You can order an appraisal directly through Appraiser Vendor
- You can order an appraisal directly through Evaluation Zone
- You can order directly through our LOS system Mortgage Machine
- Scroll through the next screens for details on each option

Appraiser Vendor [Appraiser Vendor - Redefining Appraisal Management](#)

Who We Are

Founded by appraisers, industry professionals, and IT engineers, Appraiser Vendor has the knowledge and experience to handle all of your appraisal needs. From our proprietary software, built in collaboration with our lending partners, to our seasoned staff made up of both appraisal and mortgage veterans, Appraiser Vendor is redefining appraisal management

To sign up as a client. Please follow the link [Appraisal Management System - Lenders \(spurams.com\)](#)



APPRAISERVENDOR
REDEFINING APPRAISAL MANAGEMENT

User Name

Password

[Forgot Your Password](#) [LOG IN](#)

Additional Options 

[Signup as an Appraiser](#) | [Signup as a Client](#) | [Contact Site Administrator](#)

Evaluation Zone

Introducing our Partnership with eValuationZONE:

Putting the Value Back in Appraisal Management

- Our team manages a **national network** of 3,500 certified and FHA approved appraisers to meet your guidelines and aggressive turn-times for appraisals in all 50 states
- Dedicated team members that KNOW your company.
- Our team is comprised of former executives in wholesale and retail lending, secondary markets, loan servicing, mortgage banking and appraisal industries with over a century of combined experience
- 100% of our in-house QC reviewers are Certified Appraisers
- Exemplary customer service and care
- Fully integrated with your LOS for a seamless transition
- **AMC since 2004**
- **Our In-house appraisers review 100% of appraisal reports**
- **Certified Appraisers on staff to answer client and vendor questions at any time**
- **Our management team offers over 100 years of appraising experience and expertise**
- **Phone calls are answered by staff not by automated machines**
- **Designated team contacts for each client**
- **Vendor payment +/-30 days**

Here is the link to Register or Login (it is also on our TPO website):

<https://app.collateralxp.com/ClicknCloseINC>

Please contact your Account Executive with any further questions.



Ordering your appraisal through Mortgage Machine

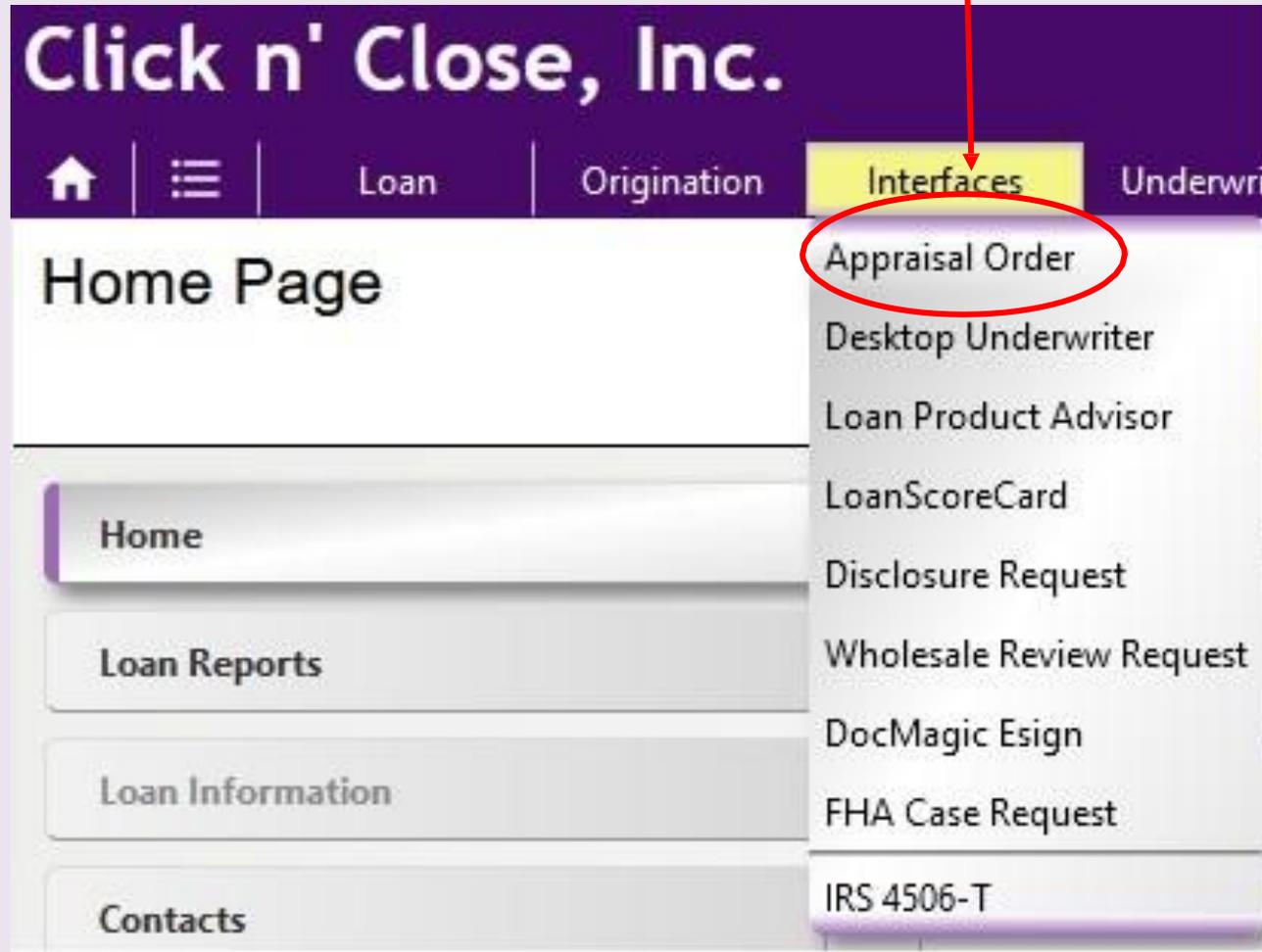
Follow the steps on the next page to do the following

- Order and complete your appraisal request
- Select the correct product and fields
- Pay for the appraisal
- Or the Borrower pay for the appraisal
- Check status on the appraisal
- View the appraisal once completed
- Retrieve the appraisal if needed

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

The screenshot shows the Click n' Close, Inc. web application interface. The top navigation bar is purple with white text, including the company name and a 'Welcome,' message. Below the navigation bar is a 'Home Page' section. On the left, there is a sidebar with buttons for 'Home', 'Loan Reports', 'Loan Information' (which is highlighted), 'Contacts', 'Bulletins and Resources', and 'Your Information'. At the bottom of the sidebar, there are links for 'Register a...', 'New Loan', and 'New Lead'. The main content area on the right features a green button labeled 'Active Loan', which is circled in red. To the right of this button are links for '[Import Data]' and '[Close Loan]'. Below the 'Active Loan' button, there are fields for 'Loan Number', 'Borrower Name', and 'Loan Status'. A list of actions is displayed, including 'Product Lookup / Lock', 'Submit to Underwriting', 'Order Closing Documents', 'URLA Lender Loan Information', 'Overview and Assignments', 'Underwriting Transmittal', 'Loan Status', and 'URLA Borrower Information'. At the bottom of the main content area, there is an 'xDOC' logo and buttons for 'View', 'Upload Multiple', and 'Upl'.

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... | | | |
| | Agency Case Number | | | |
| Borrowers | 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.

[Home](#) | [Save](#) | [Reload](#)
Wednesday, September 6, 2017 8:16:58 AM (885)

Appraisal Order

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

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

| | | | |
|----------------------------|--------------------|---|----------------------------|
| Payment Information | Credit Card Number | <input type="text"/> | |
| | CVV Security Code | <input type="text"/> | From the back of the card. |
| | Card Holder's Name | <input type="text"/> | As displayed on the card. |
| | Expiration Date | <input type="text"/> <input type="text"/> | |

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) QR...Check the box to process the order without cc authorization and a link goes to the borrower to enter their payment info.

Loan Origination Interfaces Underwriting Doc Prep Post-Closing Reports

Acreage
Property Type Detached
Estate Held In... Leasehold
Agency Case Number

Appraisal Form(s)

Comparable Rent Schedule? No
Operating Income Statement? No

Additional Notes

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

Scanned 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
Billing Address
City/State/Zip
Authorization Code If necessary.

Accept without obtaining credit card approval.

[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.

The screenshot displays a web application interface for mortgage processing. At the top, there is a navigation bar with tabs: Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, and Reports. The main content area is divided into two columns. The left column contains property details such as 'Property Address' (123 W MAIN), 'City/State/Zip' (GILBERTS IL 60136), '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), and 'Operating Income Statement?' (No). The right column contains borrower and contact information, including '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), and 'XDoc Images' (No documents have been added, Upload New Documents). Below this, there is a 'Payment Information' section with fields for 'Credit Card Number', 'CVV Security Code', 'Card Holder's Name', 'Expiration Date', 'Card Holder's Billing Address', 'City/State/Zip', and 'Authorization Code'. At the bottom, there are two buttons: 'Confirm the Appraisal Order' (highlighted with a red circle) and 'Go Back and Edit the Order'. The footer includes 'Mortgage Machine - Appraisal order will be processed.', '©2013 Altres Software, LLC. All rights reserved.', and 'Use of this website signifies your agreement to the Terms of Use | Privacy Policy.'

***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.

Open Loan

Close Loan Import Data

Loan Number: 1002115718 **ACTIVE LOAN** Property Address: 1806 Minnesota Street, Middletown, OH 45044
Borrower Name: Smith, Annette Loan Status: Purchased and Insured / QM Safe Harbor
Business Channel: Wholesale

Appraisal Order Status

Current Status: **Completed**

Originator's Email Contact: Steinacker, Jeffrey J

Additional Notes: Inspection Scheduled for 10/19/2016 1:30:00 PM

Ordered Date: 10/12/2016

Ordered By: Laura Marques

Appraiser Receipt Confirmed

Suspended Date

Estimated Completion Date: 10/24/2016

Completed Date: 10/24/2016

Total Borrower Charge: 450.00

*** Please note the comments, inspection dates, and completion dates will appear in this section.**

UPON RECEIPT OF COMPLETED APPRAISAL, IT IS THE ORIGINATOR'S RESPONSIBILITY TO SUBMIT TO UNDERWRITING IF APPLICABLE. MID AMERICA WILL NOT SUBMIT ON YOUR BEHALF IN CASE THIS WAS NOT YOUR INTENT.

CANCELLATION OF AN ORDER MUST TAKE PLACE WITHIN 24 HOURS OR THE ORDER CANNOT BE CANCELLED - NO EXCEPTIONS.

If any appraisal concerns, contact appraisals@midamericamortgage.com

[Click here for the Borrower Appraisal Report Disclosure](#)
[Click here for the Appraisal Review Dispute Request](#)
[Click here for the Appraisal Receipt](#)

-You can find the appraisal receipt, invoice, EAD report, and proof of delivery of the appraisal report.

Appraisal Docs Received

| XDoc Images | | |
|---|---------------------|---------|
| Property - Appraisal Invoice.pdf (Property) | Uploaded 10/24/2016 | 1 page |
| Property - FHA EAD Report.pdf (Property) | Uploaded 10/24/2016 | 2 pages |
| Property - Appraisal Proof of Delivery.pdf (Property) | Uploaded 10/25/2016 | 1 page |

[Upload New Documents](#) [Get Previously Uploaded Documents](#)

-Once the appraisal report is complete, please move to the next section for directions on how to locate the appraisal.

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 and contains the company name, a welcome message, and links for 'Site Map' and 'S'. Below this is a secondary navigation bar with a home icon, a menu icon, and tabs for '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' (which is highlighted), 'Contacts', 'Bulletins and Resources', and 'Your Information'. At the bottom of the sidebar are links for 'Register a...', 'New Loan', and 'New Lead'. The main content area is titled 'Active Loan' and includes links for '[Import Data]' and '[Close Loan]'. It displays loan details such as 'Loan Number', 'Borrower Name', and 'Loan Status'. Below these details is a grid of action buttons: 'Product Lookup / Lock', 'Submit to Underwriting', 'Order Closing Documents', 'URLA Lender Loan Information', 'Overview and Assignments', 'Underwriting Transmittal', 'Loan Status', and 'URLA Borrower Information'. To the right of these buttons are links for 'Estimated Close Date', 'Estimated Funding Date', and 'Business Channel'. At the bottom of the main content area, there is a row of buttons: 'XDOC View' (highlighted with a red arrow), '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 for 'Loan Documents'. The top header shows 'X Viewer | Loan Documents'. Below the header is a toolbar with various icons for navigation and document management. A red arrow points from the text above to the 'Property' tab in the left sidebar. The sidebar lists several document items:

| Document Name | Page Count |
|------------------------------|------------|
| Property - Sales Contract | 22 p |
| Property - Flood Certificate | 1 p |
| Property - FHA EAD Report | 2 p |
| Property - Appraisal | 27 p |

The 'Property' tab is currently selected and highlighted in green. The main viewing area shows a preview of a document page with the word 'APPRAISAL' visible in the top right corner.

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

The screenshot displays a document viewer interface titled "Viewer | Loan Documents". The interface includes a toolbar with various navigation and viewing options. On the left, a sidebar lists documents under the "Property" tab. The "Property - Appraisal" document is highlighted in orange and is the target of a red arrow. The main viewing area shows a preview of the appraisal report, with the word "APPRAISAL" visible in the top right corner.

| Document Name | Page Count |
|------------------------------|-------------|
| Property - Sales Contract | 22 p |
| Property - Flood Certificate | 1 p |
| Property - FHA EAD Report | 2 p |
| Property - Appraisal | 27 p |

Contact your AE for further support.