

Ordering an Appraisal in CMS

- This module provides an overview of entering a new appraisal in the appraisal order and management system (CMS) used by Kinecta.
- Click this link to log into CMS.

<https://www.collateralhq.com/default.aspx?pageId=login>

Getting Started

- After you log into CMS, you see a landing page with a menu bar (including Orders, User Management, etc.)
- Each menu bar has tabs that allow you to access specific functions.

The screenshot shows the CMS Collateral Management System dashboard. At the top, there is a menu bar with tabs: Orders (which is selected and highlighted in orange), User Management, Administration, and Logout. Below the menu bar, there are buttons for 'Create Order' and 'Search'. The main content area has a title 'Welcome to CMS'. Below it, a message states: 'Below is the dashboard summary for Nolcha Fox (Nolcha Fox) of Kinecta Federal Credit Union as of December 11, 2014 at 02:46 PM'. To the right, there is a sidebar titled 'My Orders with Messages' showing 'New' (1) and 'Require Follow Up' (0). The main content area also includes a 'My Order Pipeline Summary' section with a bar chart titled 'My Pipeline Totals' and summary statistics.

My Order Pipeline Summary

My Pipeline Totals

Status	Count
Open Orders	1
Assigned to Service Provider	0
Accepted by Service Provider	1
With Exceptions	0
Ready for Review	0
Currently In Review	0

Total Open Orders: 1 Assigned to Service Provider: 0
Accepted by Service Provider: 1 Exception Orders: 0
Ready for Review: 0 Currently in Review: 0

Tips



- Required fields are marked with a ***** red asterisk.
- After you fill out the fields, click **Submit** at the bottom of the form.

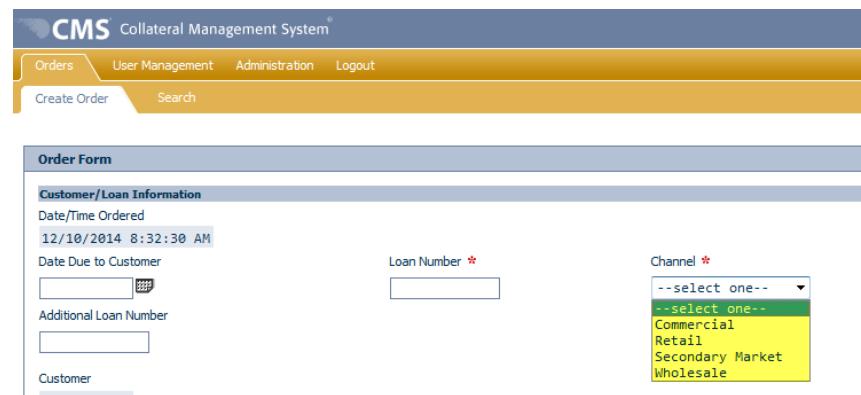
Entering a New Appraisal Order

1. Click the **Orders** menu option.
2. Click **Create Order**.



Selecting the Channel

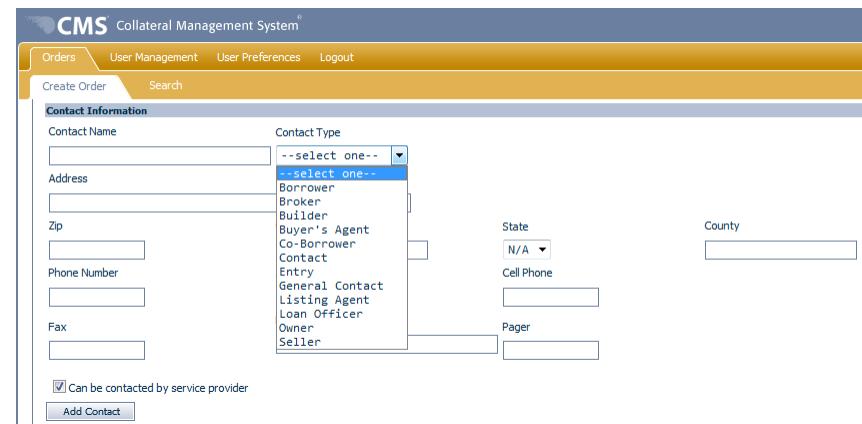
In the **Channel** Dropdown under **Customer/Loan Information**, select **Wholesale**.



The screenshot shows the CMS Collateral Management System Order Form. At the top, there is a navigation bar with links for Orders, User Management, Administration, and Logout. Below the navigation bar, there are buttons for Create Order and Search. The main form area is titled 'Order Form' and contains a section for 'Customer/Loan Information'. It includes fields for Date/Time Ordered (12/10/2014 8:32:30 AM), Date Due to Customer, Additional Loan Number, and Customer. To the right of these fields is a 'Loan Number *' field and a 'Channel *' dropdown menu. The 'Channel *' dropdown menu is open, showing five options: '--select one--', 'Commercial', 'Retail', 'Secondary Market', and 'Wholesale'. The 'Wholesale' option is highlighted with a yellow background.

Adding a Contact (at Appraisal Order Time)

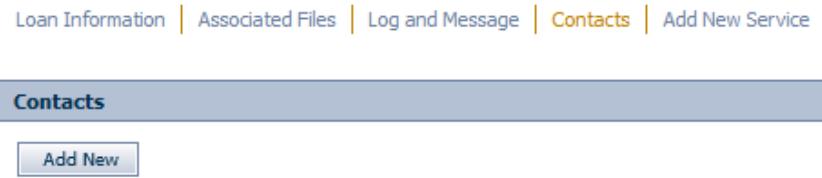
If you want to add an additional contact at your office who can receive appraisal order notifications if you are unavailable, fill out the fields in the **Contact Information** section.



The screenshot shows the CMS Collateral Management System interface. The 'Contact Information' section is active. A dropdown menu for 'Contact Type' is open, showing options such as Borrower, Broker, Builder, Buyer's Agent, Co-Borrower, Contact, Entry, General Contact, Listing Agent, Loan Officer, Owner, and Seller. Other fields in the form include 'Contact Name', 'Address', 'Zip', 'Phone Number', 'Fax', 'State' (set to 'N/A'), 'Cell Phone', 'County', 'Pager', and a checkbox for 'Can be contacted by service provider' which is checked. A 'Add Contact' button is at the bottom of the form.

Adding a Contact (After Appraisal Order) (1)

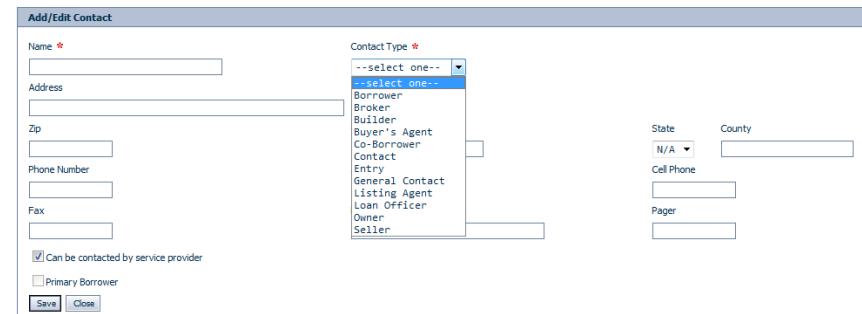
1. Search for the appraisal order.
2. Click on the order.
3. Click on the **Contacts** tab.
4. Click the **Add New** button.



Adding a Contact (After Appraisal Order) (2)

In the **Add/Edit Contact** window:

1. fill in the fields.
2. Click the **Save** button.



The screenshot shows a 'Add/Edit Contact' window with various input fields and a dropdown menu. The 'Contact Type' dropdown is open, displaying a list of options: --select one--, Borrower, Broker, Builder, Buyer's Agent, Co-Borrower, Contact, Entry, General Contact, Listing Agent, Loan Officer, Owner, and Seller. Other visible fields include 'Name' (with a red asterisk), 'Address', 'Zip', 'Phone Number', 'Fax', 'Can be contacted by service provider' (checkbox checked), 'Primary Borrower' (checkbox), 'Save' (button), and 'Close' (button). To the right, there are fields for 'State' (N/A), 'County' (input field), 'Cell Phone' (input field), and 'Pager' (input field).

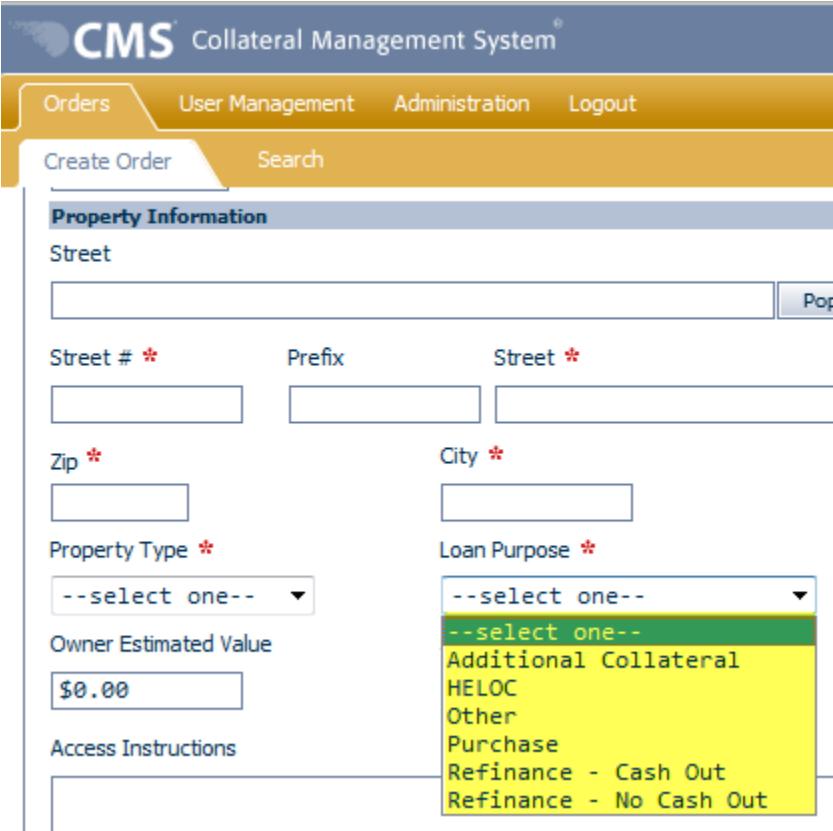
Selecting the Property Type

- In the **Property Information** section, you can fill in the street address and click **Populate** to automatically fill in some of the address fields.
- Refer to the Kinecta Client Product & Eligibility Matrix for allowed property types.
- **Manufactured homes are not allowed.**

The screenshot shows a web-based application interface for 'Collateral Management System'. The top navigation bar includes 'Orders', 'User Management', 'Administration', and 'Logout'. Below this is a 'Create Order' button and a 'Search' input field. The main content area is titled 'Property Information' and contains fields for 'Street', 'Street #', 'Prefix', 'Street', 'Zip', 'City', 'State', 'Loan Purpose', 'Sales Price', and 'Occupancy T'. A 'Populate' button is located next to the 'Street' input field. A dropdown menu for 'Property Type' is open, listing the following options: --select one--, Condominium, Duplex - 2 Unit, Duplex - 3 Unit, Duplex - 4 Unit, High Rise, Low Rise, Manufactured, PUD, SFR Attached, and SFR Detached. The 'Sales Price' field contains '\$0.00'.

Selecting the Loan Purpose

Refer to the Kinecta Client Product & Eligibility Matrix for the allowed purposes of the loan product.



CMS Collateral Management System

Orders User Management Administration Logout

Create Order Search

Property Information

Street Pop

Street # * Prefix Street *

Zip * City *

Property Type * Loan Purpose *

--select one--

Owner Estimated Value \$0.00

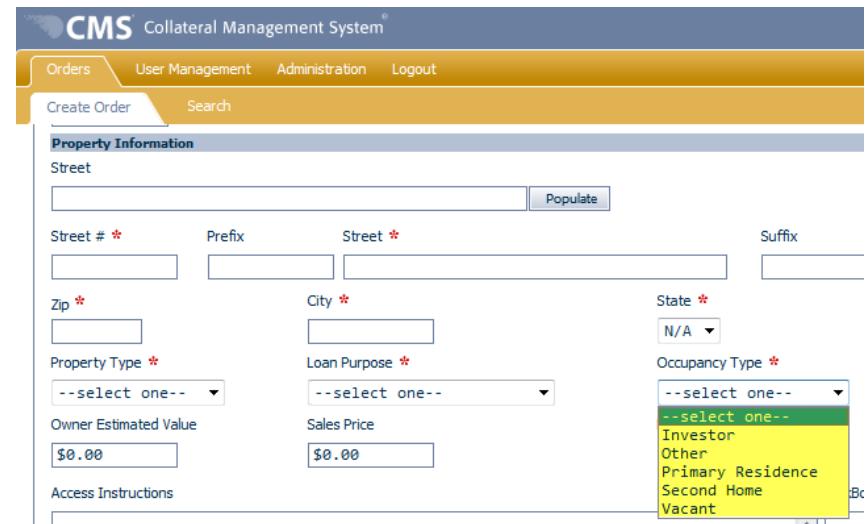
Access Instructions

--select one--

- select one--
- Additional Collateral
- HELOC
- Other
- Purchase
- Refinance - Cash Out
- Refinance - No Cash Out

Selecting the Occupancy Type

Refer to the Kinecta Client Product & Eligibility Matrix for allowed occupancy types for loan products.



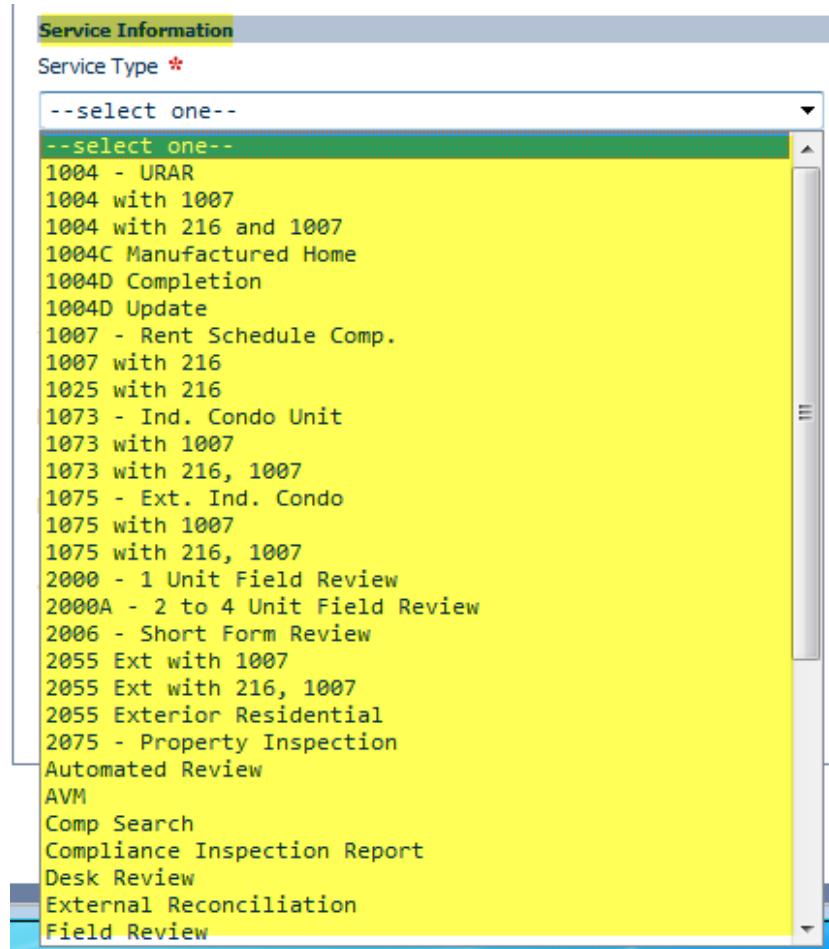
The screenshot shows a web-based application interface for 'Collateral Management System'. The top navigation bar includes 'Orders', 'User Management', 'Administration', and 'Logout'. The main content area is titled 'Property Information' and contains fields for 'Street', 'Street #', 'Prefix', 'Street', 'Suffix', 'Zip', 'City', 'State', 'Property Type', 'Loan Purpose', 'Owner Estimated Value', 'Sales Price', and 'Access Instructions'. A dropdown menu for 'Occupancy Type' is open, listing five options: 'Investor' (highlighted in green), 'Other', 'Primary Residence', 'Second Home', and 'Vacant'. The 'Investor' option is currently selected.

Selecting the Appraisal Service Type

You can select:

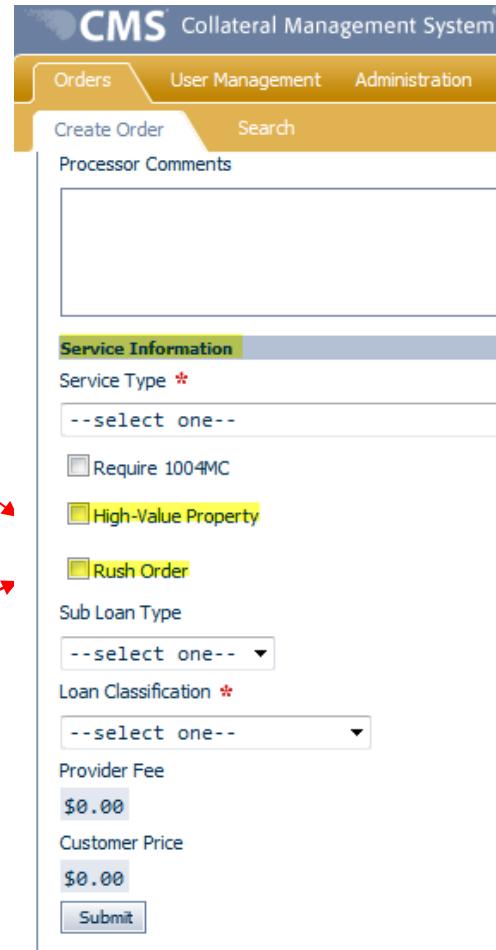
- 1004 - URAR (SFR)
- 1073 - Ind. Condo Unit
- 1025 with 216 (2-4 units residential income)
- 2000 - 1 Unit Field Review
- 1004D Completion (Re-inspection)
- 1004D Update (Update of value)

Refer to the Kinecta Client Product & Eligibility Matrix for applicable appraisal types for the loan



Filling Out Appraisal Service Information

- If the estimated value of the property is over \$1 million, click the **High Value Property** checkbox to populate the correct fee.
- If the order is a rush, click the **Rush Order** checkbox. Otherwise the order will be processed as a normal delivery.



CMS Collateral Management System®

Orders User Management Administration

Create Order Search

Processor Comments

Service Information

Service Type *

--select one--

Require 1004MC

High-Value Property

Rush Order

Sub Loan Type

--select one--

Loan Classification *

--select one--

Provider Fee

\$0.00

Customer Price

\$0.00

Submit

Uploading Files (1)

You must upload the following documents to complete the appraisal order:

- Appraisal Authorization form

NOTE: American Express credit cards are not accepted.

- Purchase contract and all addendums/amendments (for a purchase transaction only)

IMPORTANT: All documents should be legible.

Uploading Files (2)

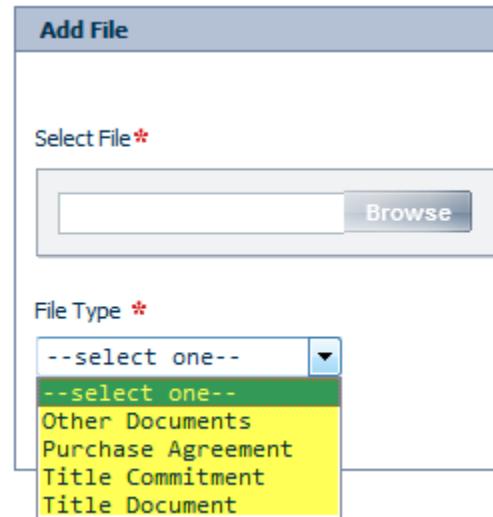
- After you submit the online appraisal order form, the **Order Summary** window appears.
- To upload the required file(s), click the **View/Add Files** or **View Order** button in the Order Summary window.



Uploading Files (3)

In the **Add File** section:

1. Select the file.
2. Select the file type:
 - **Other Documents** for the Appraisal Authorization form (credit card authorization)
 - **Purchase Agreement** for the purchase contract
3. Select the **Upload** button.



The screenshot shows a user interface for 'Add File'. At the top, there is a 'Select File' input field with a 'Browse' button. Below it is a 'File Type' dropdown menu. The dropdown menu has a header 'File Type *' and a list of options: '--select one--', 'Other Documents', 'Purchase Agreement', 'Title Commitment', and 'Title Document'. The 'Other Documents' option is highlighted with a green background, and the 'Purchase Agreement' option is highlighted with a yellow background.

Verifying Uploaded Files

After you upload files:

- Verify all the files you uploaded are listed in the **Associated Files** area.
- Open the files in to verify they are legible.

If files are not legible, either:

- You will be asked to upload a legible version.
- Contact your Account Executive/Account Manager for assistance.