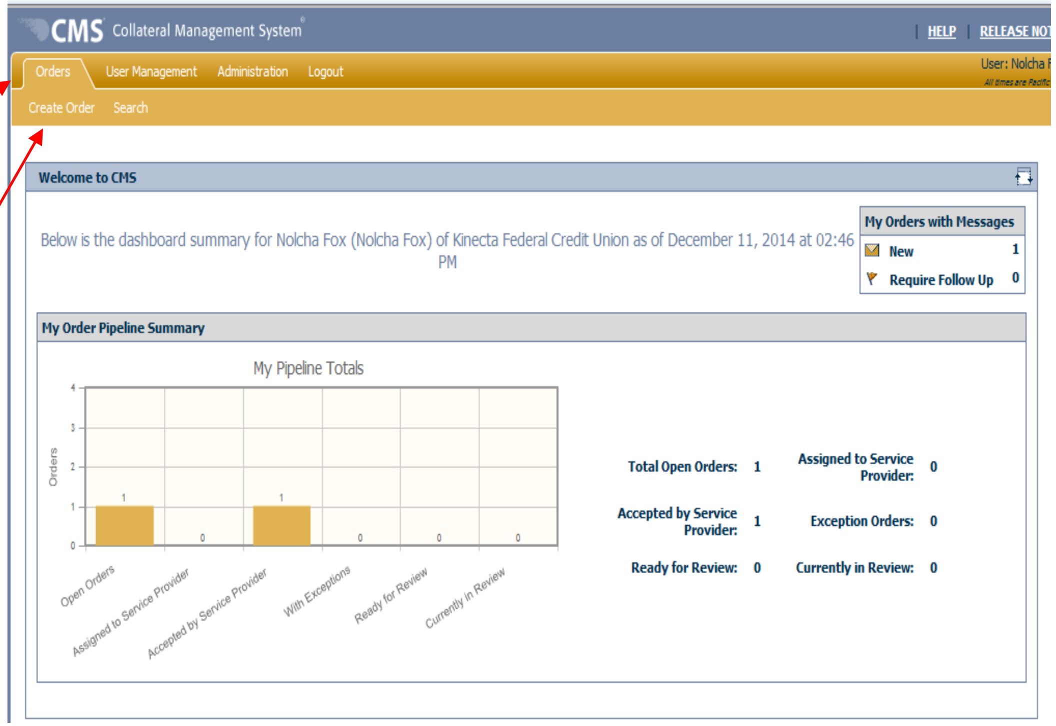
Ordering an Appraisal in CMS

- 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.



Tips

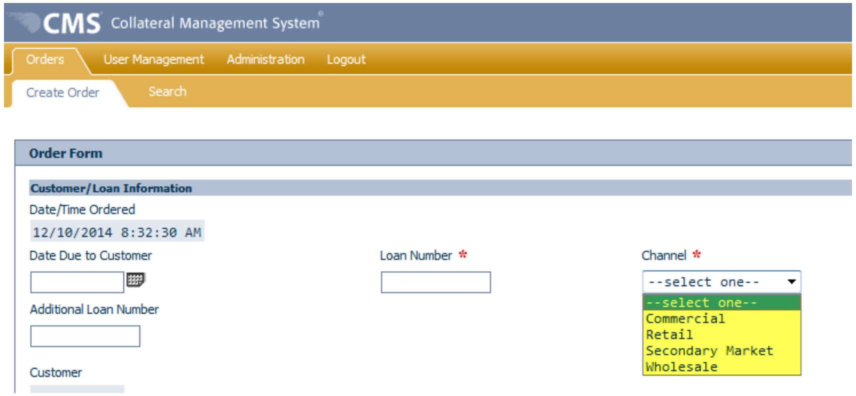
- Required fields are marked with a * red asterisk.
- After you fill out the fields, click **Submit** at the bottom of the form.

Entering a New Appraisal Order

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

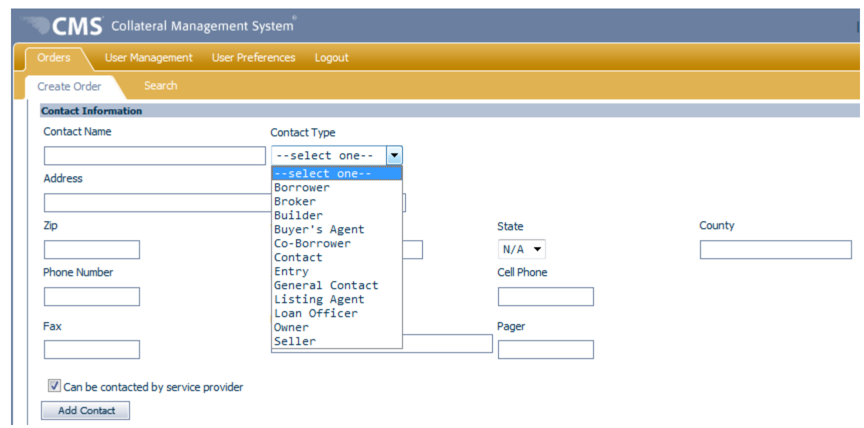
Selecting the Channel

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



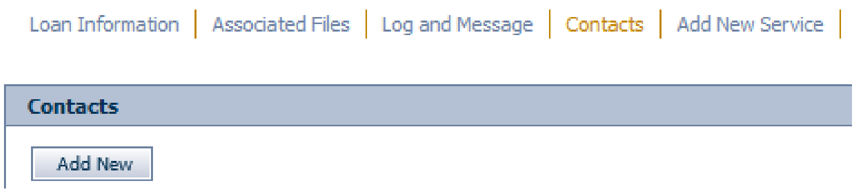
Adding a Contact (at Appraisal Order Time)

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.



Adding a Contact (After Appraisal Order) (1)

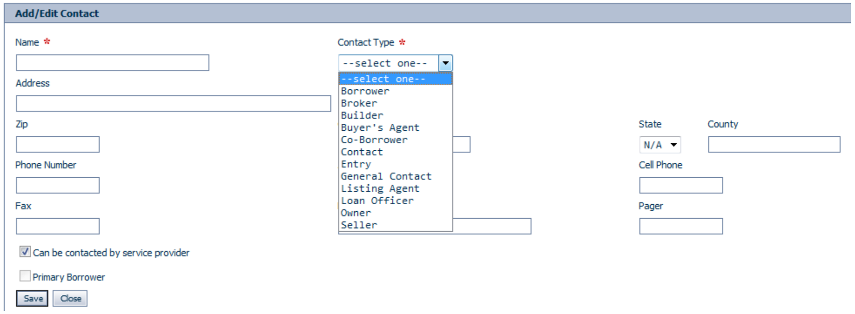
1. Search for the appraisal order.
2. Click on the order.
3. Click on the **Contacts** tab.
4. Click the **Add New** button.



Adding a Contact (After Appraisal Order) (2)

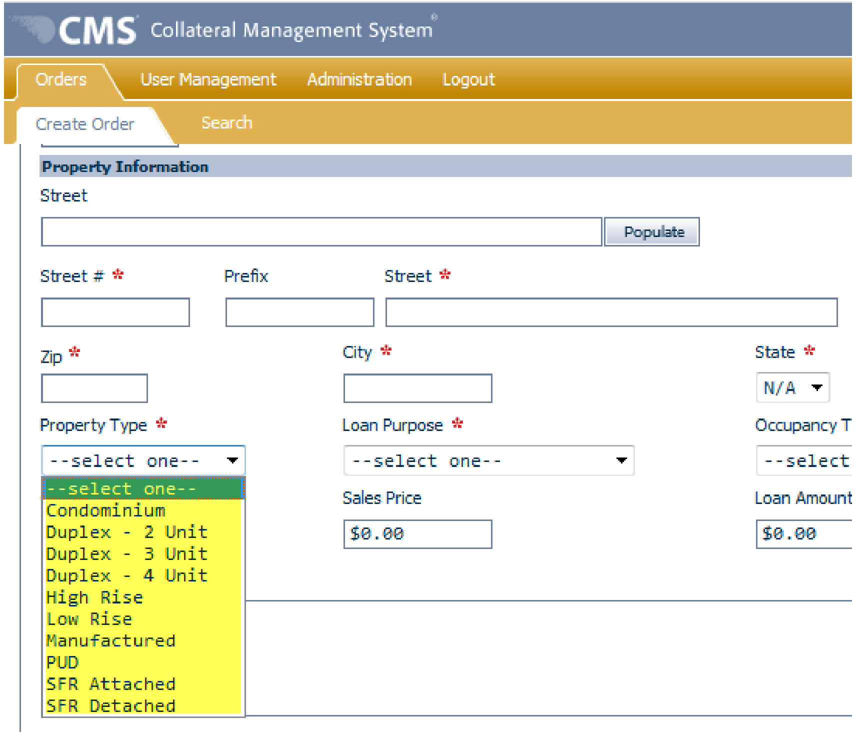
In the **Add/Edit Contact** window:

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



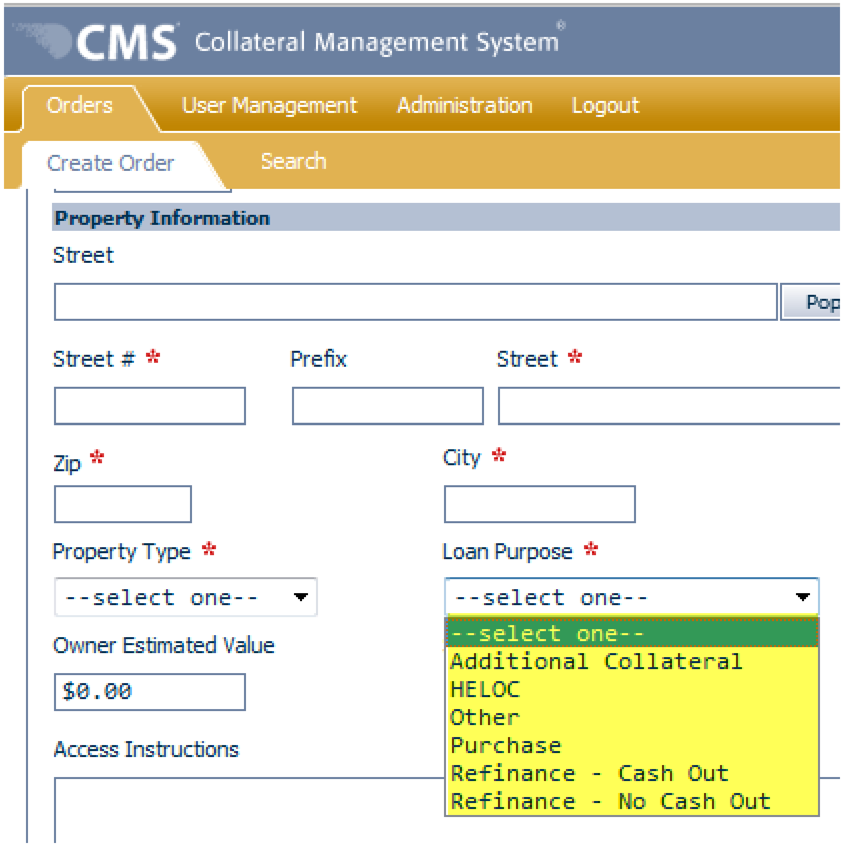
Selecting the Property Type

- 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.**



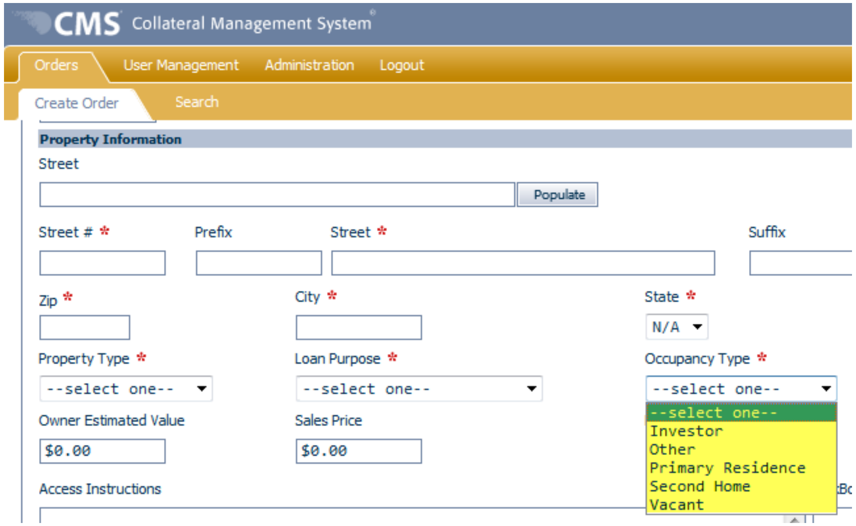
Selecting the Loan Purpose

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



Selecting the Occupancy Type

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

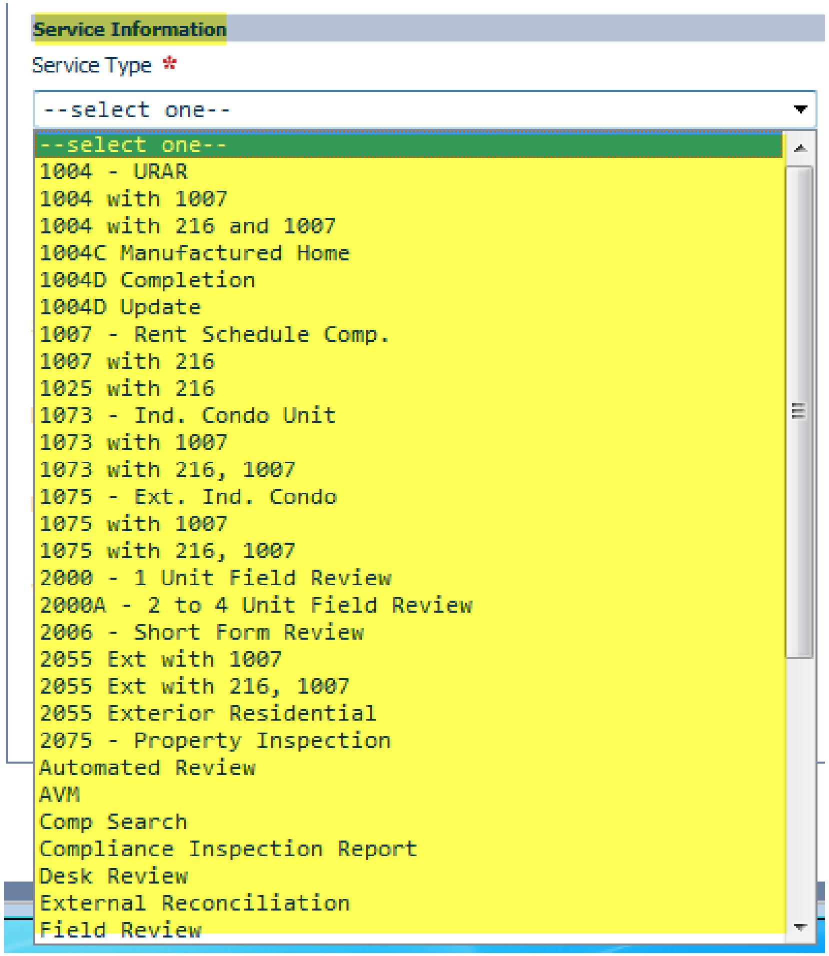


Selecting the Appraisal Service Type

You can select:

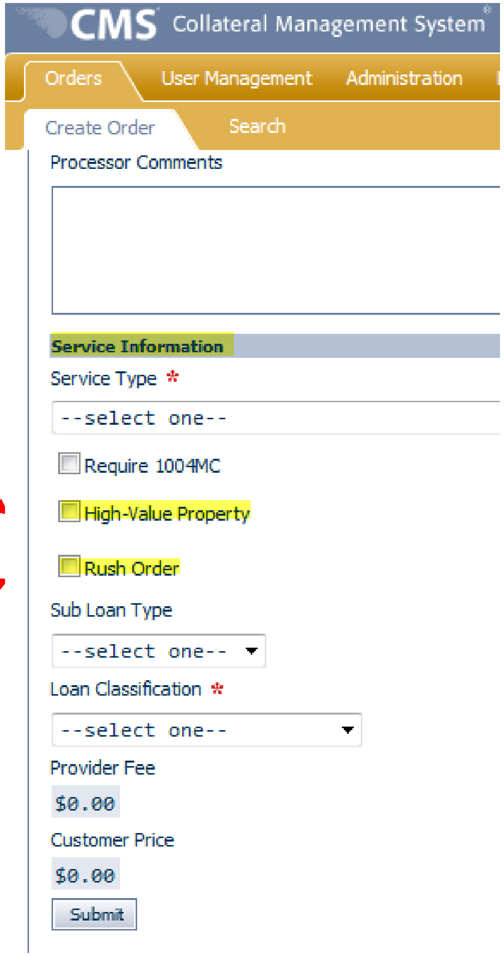
- 1004 - URAR (SFR)
- 1073 - Ind. Condo Unit
- 1025 with 216 (2-4 units residential income)
- 2000 - 1 Unit Field Review
- 1004D Completion (Re-inspection)
- 1004D Update (Update of value)

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.



Uploading Files (1)

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

- Appraisal Authorization form

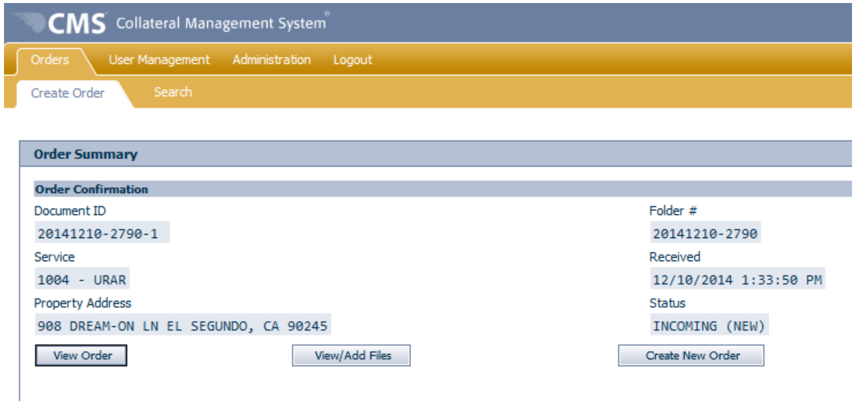
  NOTE: American Express credit cards are not accepted.

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

IMPORTANT: All documents should be legible.

Uploading Files (2)

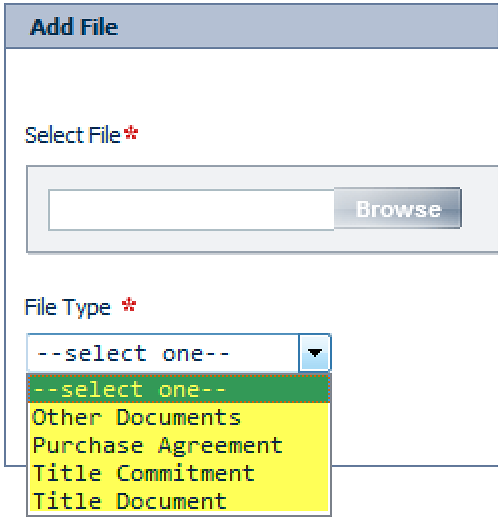
- After you submit the online appraisal order form, the **Order Summary** window appears.
- To upload the required file(s), click the **View/Add Files** or **View Order** button in the Order Summary window.



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.



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.