

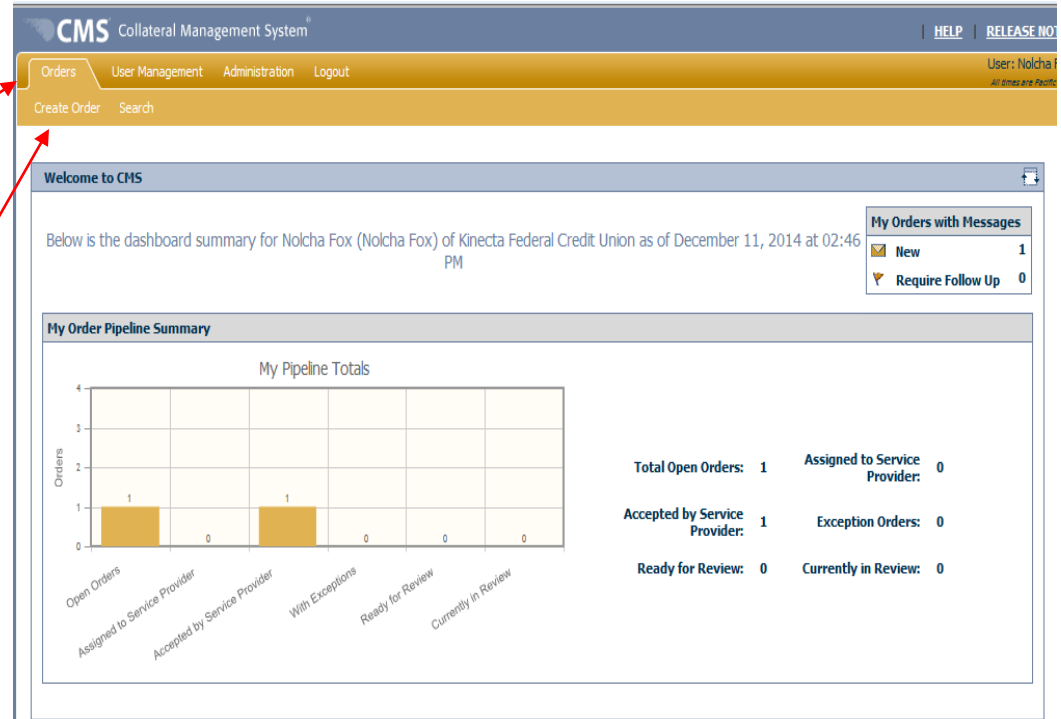
Ordering an Appraisal in CMS

- 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.

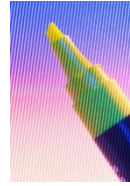
<https://www.collateralhq.com/default.aspx?pageId=login>

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**.

The screenshot displays the CMS Collateral Management System interface. At the top, there is a navigation bar with the following links: Orders, User Management, Administration, and Logout. Below this, a secondary bar contains 'Create Order' and 'Search' buttons. The main content area is titled 'Order Form' and contains a section for 'Customer/Loan Information'. This section includes several input fields: 'Date/Time Ordered' (pre-filled with '12/10/2014 8:32:30 AM'), 'Date Due to Customer' (with a calendar icon), 'Loan Number' (marked with a red asterisk), 'Additional Loan Number', and 'Customer'. The 'Channel' dropdown menu is open, showing a list of options: '--select one--', '--select one--', 'Commercial', 'Retail', 'Secondary Market', and 'Wholesale'. The 'Wholesale' option is highlighted in yellow.

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.

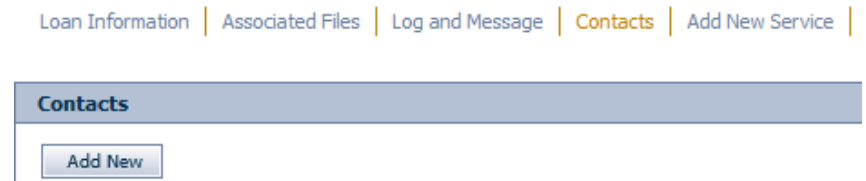
The screenshot displays the 'CMS Collateral Management System' interface. The top navigation bar includes 'Orders', 'User Management', 'User Preferences', and 'Logout'. Below this, a secondary bar contains 'Create Order' and 'Search'. The main section is titled 'Contact Information' and contains the following fields:

- Contact Name:** A text input field.
- Contact Type:** A dropdown menu with the following options: '--select one--', '--select one--', Borrower, Broker, Builder, Buyer's Agent, Co-Borrower, Contact, Entry, General Contact, Listing Agent, Loan Officer, Owner, and Seller. The 'Contact' option is currently selected.
- Address:** A text input field.
- Zip:** A text input field.
- Phone Number:** A text input field.
- Fax:** A text input field.
- State:** A dropdown menu with 'N/A' selected.
- County:** A text input field.
- Cell Phone:** A text input field.
- Pager:** A text input field.

At the bottom of the form, there is a checkbox labeled 'Can be contacted by service provider' which is checked, and an 'Add Contact' button.

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 software window titled "Add/Edit Contact". It contains several input fields and a dropdown menu. The fields are labeled: Name, Address, Zip, Phone Number, Fax, State, County, Cell Phone, and Pager. The "Contact Type" dropdown menu is open, showing a list of options: Borrower, Broker, Builder, Buyer's Agent, Co-Borrower, Contact, Entry, General Contact, Listing Agent, Loan Officer, Owner, and Seller. The "Can be contacted by service provider" checkbox is checked. The "Primary Borrower" checkbox is unchecked. The "Save" and "Close" buttons are at the bottom left.

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 displays the 'CMS Collateral Management System' interface. At the top, there's a navigation bar with 'Orders', 'User Management', 'Administration', and 'Logout'. Below this is a sub-header with 'Create Order' and 'Search'. The main section is titled 'Property Information'. It contains several input fields: 'Street' (with a 'Populate' button), 'Street #' (marked with a red asterisk), 'Prefix', 'Street' (marked with a red asterisk), 'Zip' (marked with a red asterisk), 'City' (marked with a red asterisk), 'State' (marked with a red asterisk, currently set to 'N/A'), 'Property Type' (marked with a red asterisk, with a dropdown menu open showing options like 'Condominium', 'Duplex - 2 Unit', 'Duplex - 3 Unit', 'Duplex - 4 Unit', 'High Rise', 'Low Rise', 'Manufactured', 'PUD', 'SFR Attached', and 'SFR Detached'), 'Loan Purpose' (marked with a red asterisk, with a dropdown menu), 'Sales Price' (set to '\$0.00'), 'Occupancy T' (marked with a red asterisk, with a dropdown menu), and 'Loan Amount' (set to '\$0.00').

Selecting the Loan Purpose

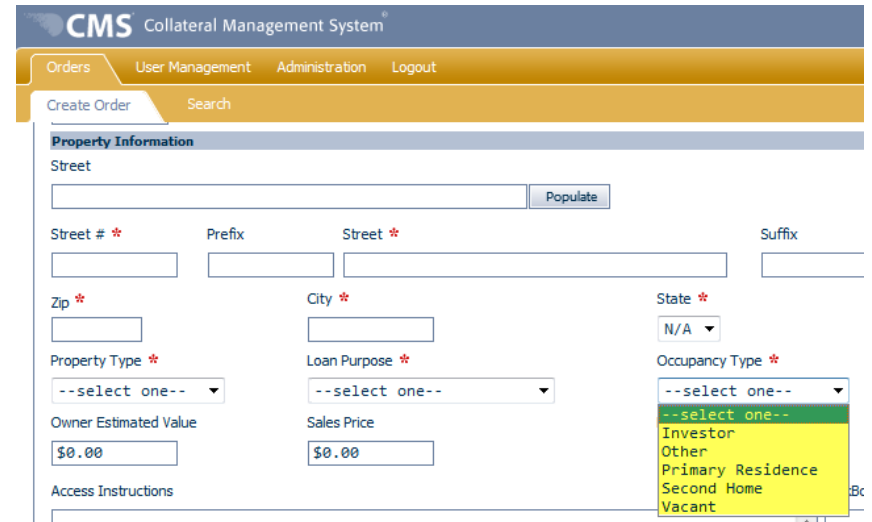
Refer to the Kinecta Client Product & Eligibility Matrix for the allowed purposes of the loan product.

The screenshot displays the 'CMS Collateral Management System' interface. The top navigation bar includes 'Orders', 'User Management', 'Administration', and 'Logout'. Below this, a secondary bar contains 'Create Order' and 'Search'. The 'Create Order' form is titled 'Property Information' and includes fields for 'Street', 'Street #', 'Prefix', 'Street', 'Zip', 'City', 'Property Type', 'Owner Estimated Value', and 'Access Instructions'. The 'Loan Purpose' dropdown menu is open, showing options: '--select one--', '--select one--', 'Additional Collateral', 'HELOC', 'Other', 'Purchase', 'Refinance - Cash Out', and 'Refinance - No Cash Out'.

Field	Value
Street	
Street # *	
Prefix	
Street *	
Zip *	
City *	
Property Type *	--select one--
Owner Estimated Value	\$0.00
Access Instructions	
Loan Purpose *	--select one--

Selecting the Occupancy Type

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



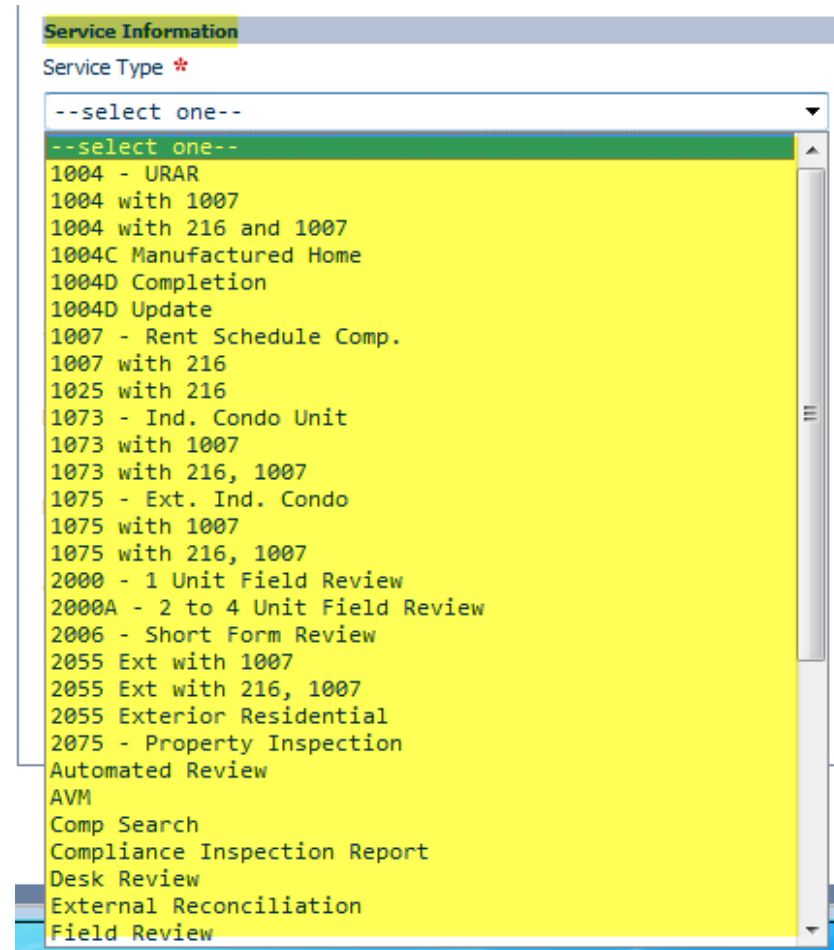
The screenshot displays the 'CMS Collateral Management System' interface. The top navigation bar includes 'Orders', 'User Management', 'Administration', and 'Logout'. Below this, the 'Create Order' tab is active, with a 'Search' option. The 'Property Information' section contains several input fields: 'Street' (with a 'Populate' button), 'Street #' (marked with a red asterisk), 'Prefix', 'Street' (marked with a red asterisk), and 'Suffix'. Below these are 'Zip' (marked with a red asterisk), 'City' (marked with a red asterisk), and 'State' (marked with a red asterisk, currently set to 'N/A'). The 'Property Type' (marked with a red asterisk) is a dropdown menu set to '--select one--'. The 'Loan Purpose' (marked with a red asterisk) is also a dropdown menu set to '--select one--'. The 'Occupancy Type' (marked with a red asterisk) is a dropdown menu that is currently open, showing options: '--select one--', 'Investor', 'Other', 'Primary Residence', 'Second Home', and 'Vacant'. The 'Owner Estimated Value' and 'Sales Price' fields are both set to '\$0.00'. An 'Access Instructions' field is located at the bottom left of the form.

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

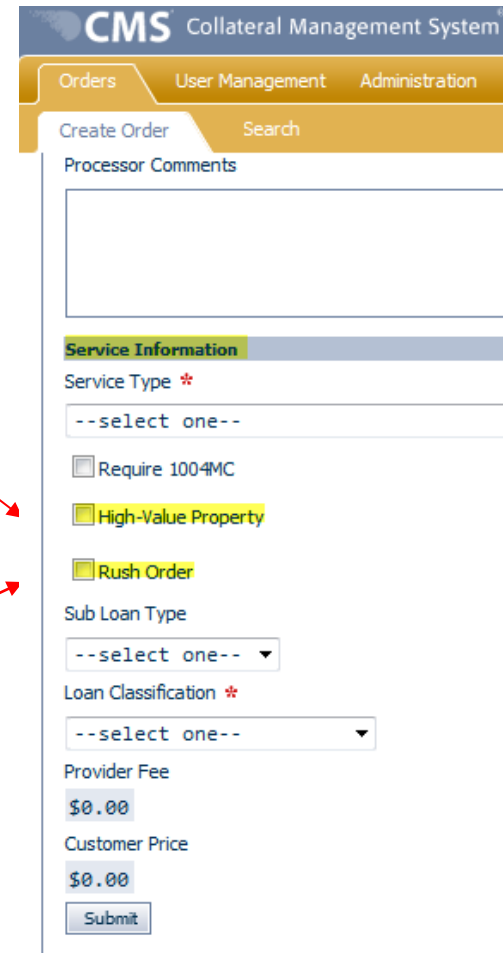


The screenshot shows a software window titled "Service Information". Inside, there is a section labeled "Service Type *". Below this is a dropdown menu with a list of service types. The list is as follows:

- select one--
- 1004 - URAR
- 1004 with 1007
- 1004 with 216 and 1007
- 1004C Manufactured Home
- 1004D Completion
- 1004D Update
- 1007 - Rent Schedule Comp.
- 1007 with 216
- 1025 with 216
- 1073 - Ind. Condo Unit
- 1073 with 1007
- 1073 with 216, 1007
- 1075 - Ext. Ind. Condo
- 1075 with 1007
- 1075 with 216, 1007
- 2000 - 1 Unit Field Review
- 2000A - 2 to 4 Unit Field Review
- 2006 - Short Form Review
- 2055 Ext with 1007
- 2055 Ext with 216, 1007
- 2055 Exterior Residential
- 2075 - Property Inspection
- Automated Review
- AVM
- Comp Search
- Compliance Inspection Report
- Desk Review
- External Reconciliation
- Field Review

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.

The screenshot shows the 'CMS Collateral Management System' interface. At the top, there is a navigation bar with links for 'Orders', 'User Management', 'Administration', and 'Logout'. Below this is a secondary bar with 'Create Order' and 'Search' buttons. The main content area is titled 'Order Summary' and contains an 'Order Confirmation' section. This section displays the following information:

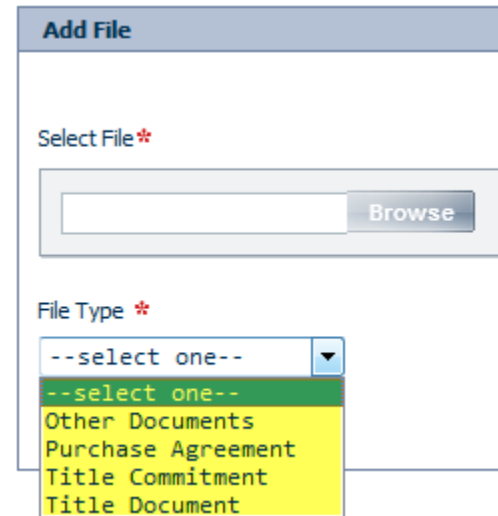
Document ID	20141210-2790-1	Folder #	20141210-2790
Service	1004 - URAR	Received	12/10/2014 1:33:50 PM
Property Address	908 DREAM-ON LN EL SEGUNDO, CA 90245	Status	INCOMING (NEW)

At the bottom of the 'Order Confirmation' section, there are three buttons: 'View Order', 'View/Add Files', and 'Create New Order'.

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 web form titled "Add File". It contains two main sections: "Select File" and "File Type". The "Select File" section has a text input field and a "Browse" button. The "File Type" section has a dropdown menu with a blue arrow icon. The dropdown menu is open, showing a list of options: "--select one--", "--select one--", "Other Documents", "Purchase Agreement", "Title Commitment", and "Title Document". The "Other Documents" option is highlighted in green, and the "Purchase Agreement" option is highlighted in yellow.

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.