Using Collateral Headquarters Just Takes 5 Simple Steps:

1. Log-on to Collateral Headquarters
Point your web browser to https://www.collateralhq.com. Click the Login link located at the middle of the screen on the right, then enter your User Name and Password.

2. Enter a New Appraisal Order(s).
From the Order Summary page, click the Orders menu option, located at the top left corner of the screen. Select the New link. A blank order form will open on the screen. Fill out the order form and click the Submit button. Upon order submission, you may be prompted to enter payment information for the appraisal order. If so, enter payment information and click the Submit button. Once the order has been successfully created, you will see an Order Confirmation screen.

3. Search for the Appraisal Order(s).
Under the Orders menu option, located at the top left corner of the screen, select the Search link. Search

for your order by status or by specific information about the order. After you select/enter your search criteria, click the Search button. Orders matching the search you selected will be listed in the Search Results portion of the screen.

4. Select and Open the Appraisal Order(s).
After running a successful search for an order, select to open the order by clicking on the magnifying glass icon at the left side of the order listed in the Search Results. The order will open in the lower portion of the screen.

5. Retrieve the Appraisal Report.
Once an order has been opened, the appraisal can be retrieved under the Associated Files page. The appraisal will be listed under the file type "Appraisal Report". Click the magnifying glass icon or the download button to open and view the appraisal.

Things to Remember...

- **Order Form**

 Required fields on the order form are marked by a red asterisk. All fields with a red asterisk must be filled out. If you forget to enter information for a required field, you will see a pop-up message on your screen indicating what information is missing when you try to submit the order.

- **Upload Files**

From the Order Confirmation screen and the Associated Files page, documents can be uploaded to an order in CHQ, such as a Purchase Agreement. The file you are uploading must be in an electronic format and must be a saved file either locally to your own computer or a shared drive. To upload a file, first click the Browse button on the Associated Files page to retrieve the file you are uploading. Next, use the drop-down list to select the File Type. Then, click the Upload button. The file you uploaded will be listed under the Associated Files page.

- **Searching**

CHQ provides several different

methods of searching. If you have a loan number or a property address of an order, the quickest and easiest way to search for that order is to select to search by either Loan Number or Property Address under the General Search menu.

The status search allows you to search for an order or a group of orders that are in a certain status. You can choose to search for orders by one, several, or all statuses. Your search results will reflect which statuses you selected, and you will be able to determine what step of the CHQ process your order is currently in.

- **Search Results**

The Search Results page will display all orders that match the search you selected. Each order is listed individually and contains important details about the order. The default sort of the Search Results is by Due Date from Service Provider. You can sort by any of the columns by clicking on the appropriate column header.

The different colors of the

Search Results reflect the due dates of the appraisal reports. Refer to the legend at the bottom of the Search Results section for an explanation of the different colors.

If an order has a new message attached to it, the Search Results will display an envelope icon on the left side of the listed order. This envelope icon is an indication that there is a new message to be read under the Log and Message page.

- **Log and Message**

The Log and Message page provides the ability to send and receive communications concerning an order. This page will also log and save all messages you compose and all messages you receive.

Use the "Compose a New Message" button to send a message about the order. To open a message, click the plus sign icon located at the left side of the listed message. Use the Reply button to reply to a message.

Collateral Headquarters Status Definitions

Below is a list of the most common statuses and definitions you will see your orders in within CHQ.

Accepted The assigned service provider has accepted the assignment.

Assigned to Provider The order has been assigned to a provider, but the provider has not yet accepted or rejected it on AppraisalPort.

Approved – As Is The review/underwriting process is complete and the appraisal has been approved. No corrections or changes are needed from the service provider. The appraisal is available to be retrieved and viewed.

Approved – With Conditions The review/underwriting process is complete and the appraisal has been approved with minor corrections. The appraisal is available to be retrieved and viewed, and the service provider has been notified of the needed corrections. These minor corrections will not affect the value of the appraisal.

Cancelled – By Request A request was made to cancel the order.

Cancelled – Duplicate Request The order was cancelled because it was found to be a true duplicate of an existing order in CHQ.

Cancelled – General The order was cancelled.

Cancelled – Refund Due The order was cancelled and the originating broker is due a refund for the payment made at the time the order was submitted.

Draft Not Acceptable The appraisal has been sent by the service provider and received by CHQ, but is deemed unacceptable because of missing, incomplete, or inaccurate information. The service provider has been made aware of the needed changes and will be able to submit a corrected appraisal.

Draft Received from Provider The appraisal report has been received by CHQ.

Exception – Duplicate Order The order was found to be a duplicate of an existing order in CHQ.

Exception – Manual Assign The order has failed auto-assignment and needs to be manually assigned to a service provider.

Exception – Processor The Access Instructions entered on the Order Form for an order need to go through the approval process.

Exception – Reviewer The appraisal has been received and the order is ready to be assigned to an underwriter/reviewer.

Incoming (New) A new service request has been received by CHQ.

On Hold The order has been placed on hold and is waiting on the necessary information to proceed in the CHQ process.

Provider Accepts with Condition The provider has accepted the assignment with some modifications to the service request conditions (e.g. fee or turn time).

Rejected Online By Provider The service provider has rejected the assignment on AppraisalPort.

Rejected – No Provider Response The service provider neither accepted nor rejected the order within the allotted time period provided by CHQ, so it has been pulled back for reassignment.

Ready for Review The order has been assigned to an underwriter/reviewer and is ready to start the review process.

With Reviewer The order is currently under review.

Support:

Please feel free to contact CHQ Customer Support if you have questions. Here's how to reach us:

Monday through Friday, 8:00 AM to 8:00 PM EST

Phone: 888-963-3330

Fax: (662) 236-2037

Email: chqsupport@fncinc.com

You can always check the resources available to you online: Online Training Videos and FAQs.