

B.O.L.T. TRAINING

Lesson 17 - Ordering An Appraisal



In This Training We Will Discuss

- Ordering An Appraisal



Ordering An Appraisal

Status and Agents

Status

Current Status: Registered Status Date: 12/21/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Registered Doc Check Funded

12/21/2018 12/21/2018

Agents

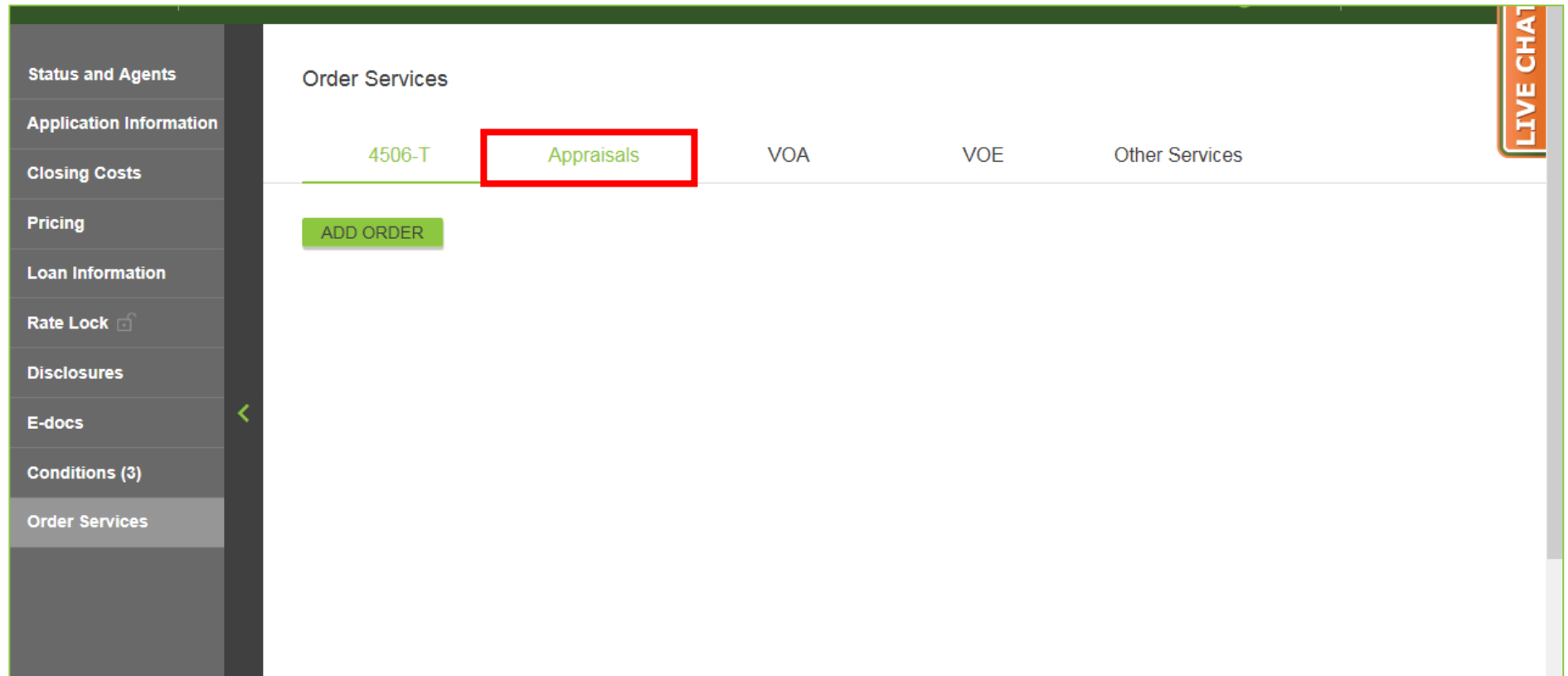
Assigned Agents in *TPO LQB Testing

Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

LIVE CHAT

1. Within a loan, click “Order Services”.



2. Click “Appraisals”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (3)

Order Services

Order Services

4506-T

Appraisals

VOA


VOE

Other Services

ADD ORDER

LIVE CHAT

3. Click “Add Order”.




Status and Agents

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Conditions (3)

Order Services

Order Services

4506-TAppraisalsVOAVOEOther Services

CANCEL ORDER

Order Request Information

AMC Vendor *
GlobalDMS

Login *
Enter Login


Password *

Account ID *

CONNECT TO VENDOR

LIVE CHAT

4. Enter Login.




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Conditions (3)

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Order Services

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CANCEL ORDER

Order Request Information

AMC Vendor *
GlobalDMS

Login *
Enter Login


Password *
••••••••

Account ID *

CONNECT TO VENDOR

LIVE CHAT

5. Enter Password.




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CANCEL ORDER

Order Request Information

AMC Vendor *
GlobalDMS

Login *
Enter Login


Password *
••••••••

Account ID *
6270

CONNECT TO VENDOR

LIVE CHAT

6. Enter Account ID of “6270”.




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Order Services

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CANCEL ORDER

Order Request Information

AMC Vendor *
GlobalDMS

Login *
Enter Login


Password *
••••••••

Account ID *
6270

CONNECT TO VENDOR

LIVE CHAT

7. Click “Connect to Vendor”.




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CANCEL ORDER

Order Request Information

AMC Vendor*
GlobalDMS

Loan Information


Loan Number1000048222Case Number

Loan Officer Full Name
Matthew Baker

Borrower / Property Info

LIVE CHAT

8. The Appraisal Order Form will appear.




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Order Services

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CANCEL ORDER

Order Request Information

AMC Vendor*
GlobalDMS

Loan Information

Loan Number
1000048222


Case Number
Enter Case Number

Loan Officer Full Name
Matthew Baker

Borrower / Property Info

LIVE CHAT

9. Enter Case Number, if applicable.




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Borrower / Property Info

Borrower Name

SUZI BUILDER

Borrower Email

suzi.builder@mwfinc.com

Property Address

Select Property

Subject Property: 1209 Nevada Street, REDLANDS, CA 92374 ▾

Street *

1209 Nevada Street

ZIPCode

92374

City

REDLANDS

State *

CA ▾

Property Access/Contact Information

Contact Name *

Contact Email

Additional Emails (up to 8 and separated by ;)

Phone Number *

Work Number *


Other Number *

LIVE CHAT

10. Confirm the Property Address matches the Subject Property Address.

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01-JAN-19



Order Services

4506-T **Appraisals** VOA VOE Other Services

Property Access/Contact Information

Contact Name * Contact Email Additional Emails (up to 8 and separated by ;)

Phone Number * Work Number * Other Number *

Assignment Information

Property Type

Report Type *


Report Type 2

Report Type 3

Report Type 4

LIVE CHAT

11. Enter Contact Name (The person whom has access to the property).




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Order Services

Order Services

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Property Access/Contact Information

Contact Name *
Enter Contact Name

Contact Email
Enter Email

Additional Emails (up to 8 and separated by ;)

Phone Number *

Work Number *

Other Number *

Assignment Information

Property Type

Report Type *


Report Type 2

Report Type 3

Report Type 4

LIVE CHAT

12. Enter Contact Email.




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Order Services

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Property Access/Contact Information

Contact Name *
Enter Contact Name

Contact Email
Enter Email

Additional Emails (up to 8 and separated by :)
Enter Additional Emails

Phone Number *

Work Number *

Other Number *

Assignment Information

Property Type

Report Type *


Report Type 2

Report Type 3

Report Type 4

LIVE CHAT

13. Enter Additional Emails, if applicable.




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Property Access/Contact Information

Contact Name *
Enter Contact Name

Contact Email
Enter Email

Additional Emails (up to 8 and separated by ;)
Enter Additional Emails

Phone Number *
(909) 793-1500

Work Number *

Other Number *

Assignment Information

Property Type

Report Type *


Report Type 2

Report Type 3

Report Type 4

LIVE CHAT

14. Enter Phone Number.




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Order Services

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Property Access/Contact Information

Contact Name *
Enter Contact Name

Contact Email
Enter Email

Additional Emails (up to 8 and separated by ;)
Enter Additional Emails

Phone Number *
(909) 793-1500

Work Number *
(909) 793-1500

Other Number *

Assignment Information

Property Type

Report Type *

Report Type 2

Report Type 3


Report Type 4

LIVE CHAT

15. Enter Work Number.

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Order Services

Order Services

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Property Access/Contact Information

Contact Name *
Enter Contact Name

Contact Email
Enter Email

Additional Emails (up to 8 and separated by ;)
Enter Additional Emails

Phone Number *
(909) 793-1500

Work Number *
(909) 793-1500

Other Number *
(909) 793-1500

Assignment Information

Property Type

Report Type *

Report Type 2

Report Type 3

Report Type 4

LIVE CHAT

16. Enter Other Number (If no Other Number, re-enter Phone Number or Work Number).

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Conditions (3)

Order Services

Order Services

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Assignment Information

Property TypeSFR

Report Type *

Report Type 2

Report Type 3

Report Type 4

Report Type 5

Intended Use *Purchase


Loan TypeConventional

Occupancy TypePrimary Residence

Client Information

LIVE CHAT

17. Select Property Type.




Status and Agents

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Conditions (3)

Order Services

Order Services

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Assignment Information

Property TypeSFR

Report Type *Conventional 1004 URAR Single Family

Report Type 2

Report Type 3

Report Type 4

Report Type 5

Intended Use *Purchase


Loan TypeConventional

Occupancy TypePrimary Residence

Client Information

LIVE CHAT

18. Select Report Type.



Order Services

4506-T **Appraisals** VOA VOE Other Services

Assignment Information

Property Type: SFR

Report Type *: Conventional 1004 URAR Single Family

Report Type 2:

Report Type 3:

Report Type 4:


Report Type 5:

Intended Use *: Purchase Loan Type: Conventional Occupancy Type: Primary Residence

Client Information

LIVE CHAT

19. Select additional Report Types, if applicable.



Order Services

4506-T **Appraisals** VOA VOE Other Services

Assignment Information

Property Type: SFR

Report Type *: Conventional 1004 URAR Single Family

Report Type 2:

Report Type 3:

Report Type 4:

Report Type 5:

Intended Use *: Purchase


Loan Type: Conventional

Occupancy Type: Primary Residence

Client Information

LIVE CHAT

20. Confirm Intended Use is accurate.




Status and Agents

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Conditions (3)

Order Services

Order Services

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Assignment Information

Property TypeSFR

Report Type *Conventional 1004 URAR Single Family

Report Type 2

Report Type 3

Report Type 4

Report Type 5

Intended Use *Purchase


Loan TypeConventional

Occupancy TypePrimary Residence

Client Information

LIVE CHAT

21. Confirm Loan Type is accurate.




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Conditions (3)

Order Services

Order Services

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Assignment Information

Property TypeSFR

Report Type *Conventional 1004 URAR Single Family

Report Type 2

Report Type 3

Report Type 4

Report Type 5

Intended Use *Purchase


Loan TypeConventional

Occupancy TypePrimary Residence

Client Information

LIVE CHAT


22. Confirm Occupancy Type is accurate.



Order Services

4506-T **Appraisals** VOA VOE Other Services

Client Information

Appraisal Needed Date *
12/31/2018 

Client 2 Processor Processor 2 Lender

Billing Information


Billing Method *

Extra Information


Attachment Type

LIVE CHAT

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23. Enter Appraisal Needed Date.



Order Services

4506-T **Appraisals** VOA VOE Other Services

Client Information

Appraisal Needed Date *
12/31/2018

Client 2 Processor Processor 2 Lender
Mountain West Financial

Billing Information


Billing Method *

Extra Information

Attachment Type

LIVE CHAT

24. Select Client 2 as “Mountain West Financial”.




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Client Information

Appraisal Needed Date *
12/31/2018 

Client 2
Mountain West Financial

Processor
Matt Baker

Processor 2

Lender

Billing Information


Billing Method *

Extra Information

Attachment Type

LIVE CHAT

25. Select Processor, if needed.




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Client Information

Appraisal Needed Date *
12/31/2018 

Client 2
Mountain West Financial

Processor
Matt Baker

Processor 2

Lender

Billing Information


Billing Method *

Extra Information

Attachment Type

LIVE CHAT

26. Select Processor 2, if needed.




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Client Information

Appraisal Needed Date *
12/31/2018 

Client 2ProcessorProcessor 2Lender

Mountain West FinancialMatt BakerMountain West Financial

Billing Information


Billing Method *

Extra Information

Attachment Type

LIVE CHAT

27. Enter Lender as “Mountain West Financial”.



Order Services

4506-T **Appraisals** VOA VOE Other Services

Mountain West Financial Matt Baker Mountain West Financial

Billing Information

Billing Method *
Credit Card

Billing Name: *

Billing Address
Street * ZIPCode City State *


Card Type *
Visa

Card Number * Card Expiration (mm/yyyy) * CVV / CCID # *
 /

LIVE CHAT

If The Broker Is Paying For The Appraisal

28-A. Select “Credit Card” and enter the required information.




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Order Services

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Mountain West FinancialMatt BakerMountain West Financial

Billing Information

Billing Method *
Bill

Extra Information

Attachment Type

Documents+ attach document to orderNotes

LIVE CHAT

If The Borrower Is Paying For The Appraisal

28-B. Select “Bill”. This will send an email to the Borrower, with a link to allow them to pay.

Loan Information

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Conditions (3)

Order Services

Billing Information

Billing Method *
Bill

Extra Information

Attachment Type
Purchase Agreement

Documents [+ attach document to order](#)

Notes

PLACE ORDER


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Mountain West Financial, Inc.,
Its Successors and/or Assigns
1209 Nevada Street, STE 200


FHA: 7426000000
VA: 9051040000

LIVE CHAT

29. Attach the Purchase Contract, along with additional documents needed.



Loan Information

Rate Lock 

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Conditions (3)

Order Services

Billing Information

Billing Method *
Bill

Extra Information

Attachment Type
Purchase Agreement

Documents [+ attach document to order](#)

Notes
Enter Intent To Proceed Date

PLACE ORDER

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FHA: 7426000000
VA: 9051040000

LIVE CHAT

30. Enter the Intent to Proceed Date in the Notes.

Loan Information

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Conditions (3)

Order Services

Billing Information

Billing Method *

Bill

Extra Information

Attachment Type

Purchase Agreement

Documents [+ attach document to order](#)

Notes

Enter Intent To Proceed Date

PLACE ORDER

LIVE CHAT

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FHA: 7426000000
VA: 9051040000

31. Click “Place Order”.



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>