

Click n' Close Appraisal Order Options



Click n' Close™, Inc.
Mortgage

Click n Close, Inc. - 3 options for ordering your appraisal

Order

- You can order an appraisal directly through Appraiser Vendor

Order

- You can order an appraisal directly through Evaluation Zone


Order

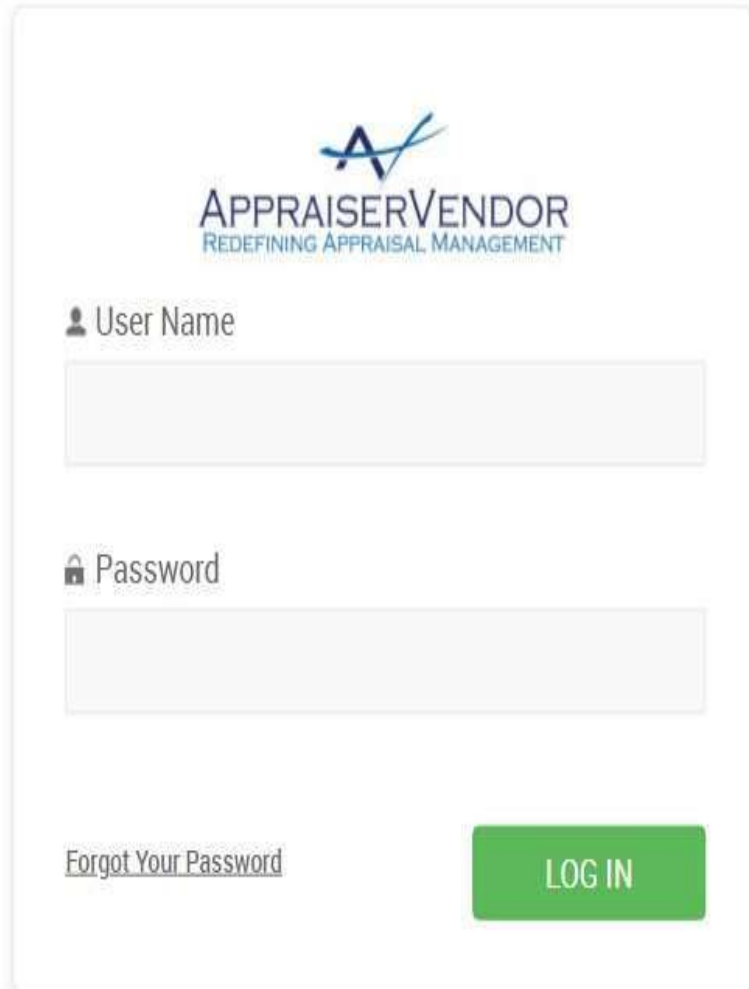
- You can order directly through our LOS system Mortgage Machine

Scroll through

- Scroll through the next screens for details on each option

The following items are required to place an Appraisal Order

- Loan needs to be registered in Mortgage Machine
 - Intent to Proceed Executed by Applicant
 - Proof the Applicant received the Loan Estimate
 - FHA Product: FHA Case Number
 - Purchase Loans: Fully Executed Purchase Contract
- 
- A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.



The image shows a login form for Appraiser Vendor. At the top is the logo, which consists of a stylized 'A' with a blue and green swoosh, followed by the text 'APPRAISERVENDOR' and 'REDEFINING APPRAISAL MANAGEMENT' below it. Below the logo are two input fields: 'User Name' with a person icon and 'Password' with a lock icon. To the left of the 'Password' field is a link that says 'Forgot Your Password'. At the bottom right of the form is a green button with the text 'LOG IN' in white capital letters.

Additional Options

[Signup as an Appraiser](#) | [Signup as a Client](#) | [Contact Site Administrator](#)

- **Appraiser Vendor [Appraiser Vendor - Redefining Appraisal Management](#)**

- Who We Are

- Founded by appraisers, industry professionals, and IT engineers, Appraiser Vendor has the knowledge and experience to handle all of your appraisal needs. From our proprietary software, built in collaboration with our lending partners, to our seasoned staff made up of both appraisal and mortgage veterans, Appraiser Vendor is redefining appraisal management

- To sign up as a client. Please follow the link

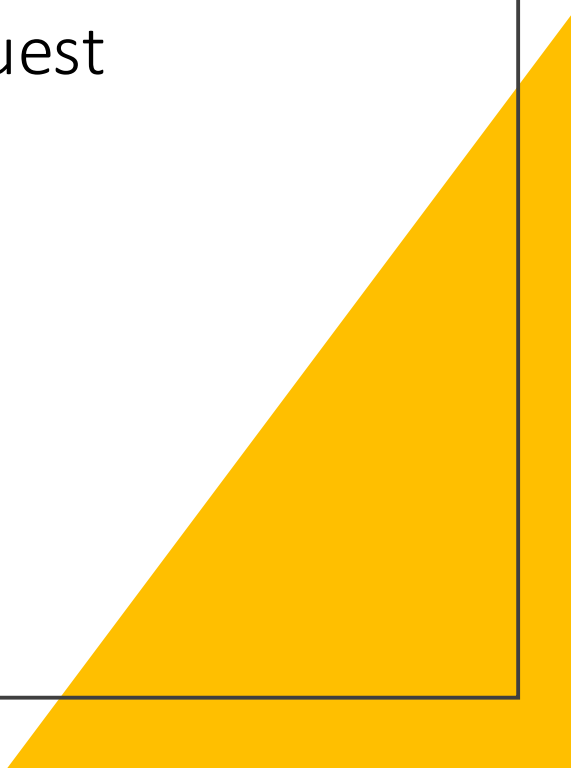
- [Appraisal Management System - Lenders \(spurams.com\)](#)

Evaluation Zone

- Introducing our Partnership with **eValuationZONE**:
- Putting the Value Back in Appraisal Management
- Our team manages a national network of 3,500 certified and FHA approved appraisers to meet your guidelines and aggressive turn-times for appraisals in all 50 states
- Dedicated team members that KNOW your company.
- Our team is comprised of former executives in wholesale and retail lending, secondary markets, loan servicing, mortgage banking and appraisal industries with over a century of combined experience
- 100% of our in-house QC reviewers are Certified Appraisers
- Exemplary customer service and care
- Fully integrated with your LOS for a seamless transition
- AMC since 2004
- Our In-house appraisers review 100% of appraisal reports
- Certified Appraisers on staff to answer client and vendor questions at any time
- Our management team offers over 100 years of appraising experience and expertise
- Phone calls are answered by staff not by automated machines
- Designated team contacts for each client
- Vendor payment +/-30 days
 - Here is the link to Register or Login (it is also on our TPO website):
- <https://app.collateralxp.com/ClicknCloseINC>
- Please contact your Account Executive with any further questions.

Ordering your appraisal through Mortgage Machine

Follow the steps on the next page to do the following

- Order and complete your appraisal request
 - Select the correct product and fields
 - Pay for the appraisal
 - Or the Borrower pay for the appraisal
 - Check status on the appraisal
 - View the appraisal once completed
 - Retrieve the appraisal if needed
- 
- A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.

Step 1



Open the specific loan for the appraisal request

Make sure the screen states “Active” Loan.

Active Loan [\[Import Data | Close Loan\]](#)

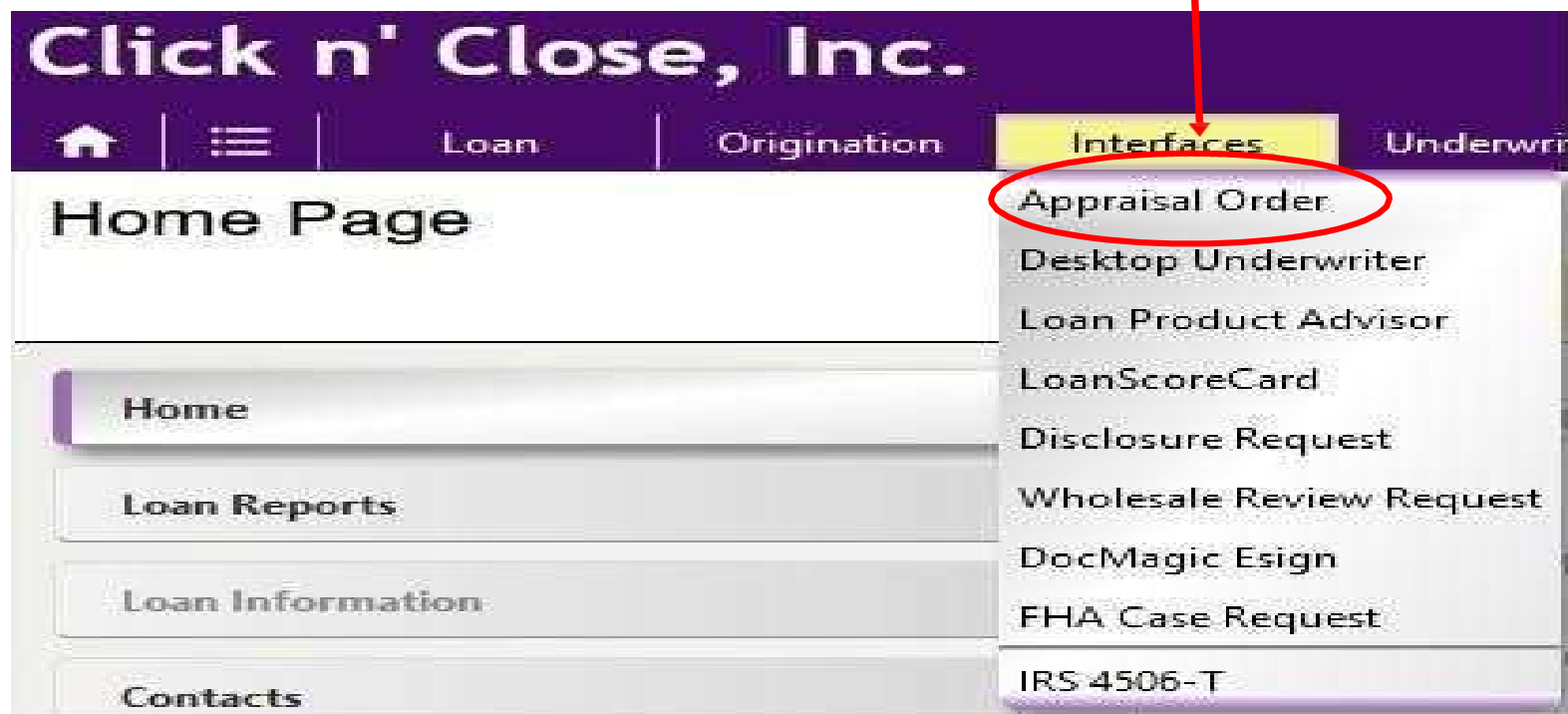
Loan Number	1002394713	Estimated Close Date	10/27/2023
Borrower Name	Test Loan	Estimated Funding Date	10/27/2023
Loan Status	Loan Originated	Business Channel	Retail

- ▶ Product Lookup / Lock
- ▶ Submit to Underwriting
- ▶ Order Closing Documents
- ▶ URLA Lender Loan Information
- ▶ Overview and Assignments
- ▶ Underwriting Transmittal
- ▶ Loan Status
- ▶ URLA Borrower Information
- ▶ Pipeline and Loan Reports
- ▶ Reporting

 [▶ View in Click n File](#)  [▶ Upload Documents](#)

Step 2

Click the Interfaces Tab. A drop-down will appear.
Click on Appraisal Order link.





Step 3

The Appraisal Order page should open. Please fill in the order with the requested information.

Make sure that you have requested the agency case number if have an FHA loan.

Appraisal Order

Property	Property Address	1103 oxbow dr # <input type="text"/>
		<input type="checkbox"/> Change to TBD <input type="button" value="Use Borrower's Present Address"/>
	City/State/Zip	irving TX 75038 <input type="button" value="Lookup"/>
	County	dallas 
	Legal Description	<input type="text"/>
	Acreage	<input type="text"/>
	Property Type	Detached <input type="text"/>
	Number Of Units	1 <input type="text"/>
Estate Held In...	<input type="text"/>	
Agency Case Number	<input type="text"/>	
Borrowers	Borrower Name	Test <input type="text"/> <input type="text"/> Loan <input type="text"/>
	Borrower Home Phone	<input type="text"/>
	Borrower Work Phone	<input type="text"/>
	Borrower Email	<input type="text"/>
Contact Information	<input type="checkbox"/> Borrower will be the contact for entry	
	Entry Contact Person	<input type="text"/>
	Entry Contact Phone	<input type="text"/>
	Entry Contact Email	<input type="text"/>
	Originator's Contact	<input type="text"/>



Step 4

Select the correct Appraisal form required for the mortgage product submitted in Mortgage Machine.

Appraisal Form(s)

- Conv 1004 - Uniform Residential Appraisal Report - Interior and Exterior Inspection
- Conv 1004C - Manufactured Home
- Conv 1004D - Final Inspection
- Conv 1025 - Small Residential Income Property Appraisal Report
- Conv 1073 - Individual Condominium Unit Appraisal Report
- FHA 1004
- FHA 1004C - Manufactured Home
- FHA 1004D - Final Inspection
- FHA 1025
- FHA 1073
- USDA 1004 - Appraisal (FNMA 1004)
- USDA 1073 - Condo Appraisal (FNMA 1073)
- VA Appraisal
- Comparable Rent Schedule
- Operating Income Statement (needed if counting rental income for the subject)

Additional Notes

XDoc Images
No documents have been added.
[Upload New Documents](#)

Order the Appraisal

Step 5

Please upload the sales contract if the transaction is a Purchase (or any additional documents needed by appraiser).

Form(s)

- Conv 1004 - Uniform Residential Appraisal Report - Interior and Exterior Inspection
- Conv 1004C - Manufactured Home
- Conv 1004D - Final Inspection
- Conv 1025 - Small Residential Income Property Appraisal Report
- Conv 1073 - Individual Condominium Unit Appraisal Report
- FHA 1004
- FHA 1004C - Manufactured Home
- FHA 1004D - Final Inspection
- FHA 1025
- FHA 1073
- USDA 1004 - Appraisal (FNMA 1004)
- USDA 1004C - Manufactured Home
- USDA 1073 - Condo Appraisal (FNMA 1073)
- VA Appraisal
- Comparable Rent Schedule
- Operating Income Statement (needed if counting rental income for the subject)

Notes

Warnings:

Appraisal Type is required.

BE sure to upload a copy of the sales contract for purchase transactions, and CC au

 [Refresh List](#) |  [Report Incorrect Error Message\(s\)](#)

Click n File Documents

No documents have been added.

 [Upload New Documents](#)  [Get Previously Uploaded Documents](#)

Step 6

Once steps 1-5 have been completed,
Click on the “Order the Appraisal” tab at the
bottom left of the page.

The screenshot displays a web interface with a light gray background. On the left side, there is a vertical sidebar with a dark blue header. The main content area is divided into sections. The top section is titled "Validation" and contains a "Warnings:" section with two orange text boxes: "Appraisal Type is required." and "BE sure to upload a copy of the sales contract for purchase transactions, and CC authorization on all transactions". Below these are two links: "Refresh List" and "Report Incorrect Error Message(s)". The middle section is titled "Click n File Documents" and contains the text "No documents have been added." followed by two links: "Upload New Documents" and "Get Previously Uploaded Documents". At the bottom left, a dark blue button with white text "Order the Appraisal" is highlighted with a red rectangular box. A red arrow points from the top left towards this button.

Validation

Warnings:

Appraisal Type is required.

BE sure to upload a copy of the sales contract for purchase transactions, and CC authorization on all transactions

[Refresh List](#) | [Report Incorrect Error Message\(s\)](#)

Click n File Documents

No documents have been added.

[Upload New Documents](#) [Get Previously Uploaded Documents](#)

Order the Appraisal

Step 7

After clicking “Order the Appraisal” tab, you should see the following example.

This is a review of the order, so please look it over.

The screenshot displays a web application interface for reviewing an appraisal order. The top navigation bar includes links for Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, and Reports. The current page is titled 'Appraisal Order' and shows the date and time as Wednesday, September 6, 2017 8:16:58 AM (885). Below the navigation bar, there is a summary box with the following information:

Loan Number:	2002131248	ACTIVE LOAN	Property Address:	123 W MAIN, GILBERTS, IL 60136
Borrower Name:	SCENARIO, TEST		Loan Status:	Loan Originated
Business Channel:	Correspondent			
	Mini			

Below the summary box, there is a section titled 'Please review and confirm the order information:' followed by an 'Appraisal Order Review' section. This section is divided into several sub-sections:

- Property:** Property Address: 123 W MAIN, City/State/Zip: GILBERTS IL 60136, County: tbd, Legal Description, Acreage: Less than 1 acre, Property Type: Detached, Estate Held In...: Fee Simple, Agency Case Number: 12345678.
- Borrowers / Contact Information:** Borrower Name: TEST SCENARIO, Borrower Home Phone: 333333333, Borrower Work Phone: 333333333, Borrower Email, Borrower will be the contact for entry?: No.
- Contact Information:** Contact Person: 3, Contact Phone: 3, Contact Email: 3.
- Appraisal Form(s):** Comparable Rent Schedule?: No, Operating Income Statement?: No.
- Additional Notes:**
- Loan Information:** Estimated Value Range, Loan Purpose: Purchase, Occupancy Status: Primary Residence.
- XDoc Images:** No documents have been added. [Upload New Documents](#)

At the bottom of the screen, there is a 'Payment Information' section with the following fields:

Credit Card Number	<input type="text"/>	
CVV Security Code	<input type="text"/>	From the back of the card.
Card Holder's Name	<input type="text"/>	As displayed on the card.
Expiration Date	<input type="text"/>	

Step 8 - Payment of the Appraisal.

Option 1- Either input the credit card info below (card will not be charged until the appraisal is received by CNC) or...Option 2 -check the box to process the order without cc authorization and a link will be sent to the borrower to enter their payment info.

The screenshot displays a web application interface for loan processing. The top navigation bar includes tabs for Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, and Reports. The main content area is divided into several sections:

- Property Information:** Acreage, Property Type (Detached), Estate Held In (Leasehold), Agency Case Number, and Appraisal Form(s).
- Comparable Rent Schedule?** No
- Operating Income Statement?** No
- Additional Notes:**

On the right side, there are sections for:

- Borrower Email:** james.cassinelli@mmachine.net
- Borrower will be the contact for entry?** No
- Contact Information:** Contact Person, Contact Phone, Contact Email, and Originator's Contact.
- Loan Information:** Estimated Value Range, Loan Purpose (Purchase), and Occupancy Status (Primary Residence).
- Scanned Images:** No documents have been added. [Upload New Documents](#)

The **Payment Information** section is highlighted with a red bracket and contains the following fields:

- Credit Card Number
- CVV Security Code
- Card Holder's Name
- Expiration Date
- Billing Address
- City/State/Zip
- Authorization Code

Additional text in the Payment Information section includes: "From the back of the card. As displayed on the card." and "If necessary,".

A red arrow points to a checkbox labeled "Accept without obtaining credit card approval", which is highlighted with a red box.

At the bottom of the form, there are two buttons: "Confirm the Appraisal Order" and "Go Back and Edit the Order".

Step 9

Once the credit card information is filled in (OR the box was checked to process without cc authorization), please click the "Confirm the Appraisal Order" tab.- Appraisal will be ordered.

Loan	Origination	Interfaces	Underwriting	Doc Prep	Post-Closing	Reports
Property Property Address: 123 W MAIN City/State/Zip: GILBERTS IL 60136 County: tbd Legal Description: Acreage: Less than 1 acre Property Type: Detached Estate Held In...: Fee Simple Agency Case Number: 12345678			Borrowers / Contact Information Borrower Name: TEST SCENARIO Borrower Home Phone: 333333333 Borrower Work Phone: 333333333 Borrower Email: Borrower will be the contact for entry? No			
Appraisal Form(s) Comparable Rent Schedule? No Operating Income Statement? No Additional Notes			Contact Information Contact Person: 3 Contact Phone: 3 Contact Email: 3 Originator's Contact: Loan Information Estimated Value Range: Loan Purpose: Purchase Occupancy Status: Primary Residence			
XDoc Images No documents have been added. Upload New Documents						
Payment Information		Credit Card Number	<input type="text"/>			
		CVV Security Code	<input type="text"/>	<input type="text"/>	From the back of the card.	
		Card Holder's Name	<input type="text"/>		As displayed on the card.	
		Expiration Date	<input type="text"/>	<input type="text"/>		
Card Holder's Billing Address		Billing Address	<input type="text"/>			
		City/State/Zip	<input type="text"/>	<input type="text"/>		
		Authorization Code	<input type="text"/>	If necessary.		
Confirm the Appraisal Order Go Back and Edit the Order						

Mortgage Machine

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Checking Status and appraisal retrieval (Click n' Close Appraisal)

Step 1: Open-up the loan file in Mortgage Machine.

Step 2: Once the file is open and Active, click the Interfaces tab at the top of the page.

Appraisal Order Status

Current Status

Completed

Originator's Email Contact

Berkemeier, Ami Michelle ▾

Additional Notes

Payment Successfully Processed-- 11/20 Per Appraiser- left message for agent-- Inspection Completed at 11/21/2023 9:00:00 AM

Ordered Date

11/14/2023

Ordered By

Ami Michelle Berkemeier

Appraiser Receipt Confirmed

Suspended Date

Estimated Completion Date

11/27/2023

Completed Date

11/28/2023

Total Borrower Charge

495.00

Appraisal Docs Received

Click n File Documents

No documents have been added.

UPON RECEIPT OF COMPLETED APPRAISAL, IT IS THE ORIGINATOR'S RESPONSIBILITY TO SUBMIT TO UNDERWRITING IF APPLICABLE. MID AMERICA WILL NOT SUBMIT ON YOUR BEHALF IN CASE THIS WAS NOT YOUR INTENT.

CANCELLATION OF AN ORDER MUST TAKE PLACE WITHIN 24 HOURS OR THE ORDER CANNOT BE CANCELLED - NO EXCEPTIONS.

If any appraisal concerns, contact the appraisal team by the office you do business with:

MAM Retail, RedRock Retail, Icon, Village Express & Chicago Wholesale Appraisal Desk
appraisals@clicknclose.com

1st Tribal
Appraisals@1tribal.com

Schmidt Mortgage - Ohio
Lisa.Tackett@schmidtmortgage.com

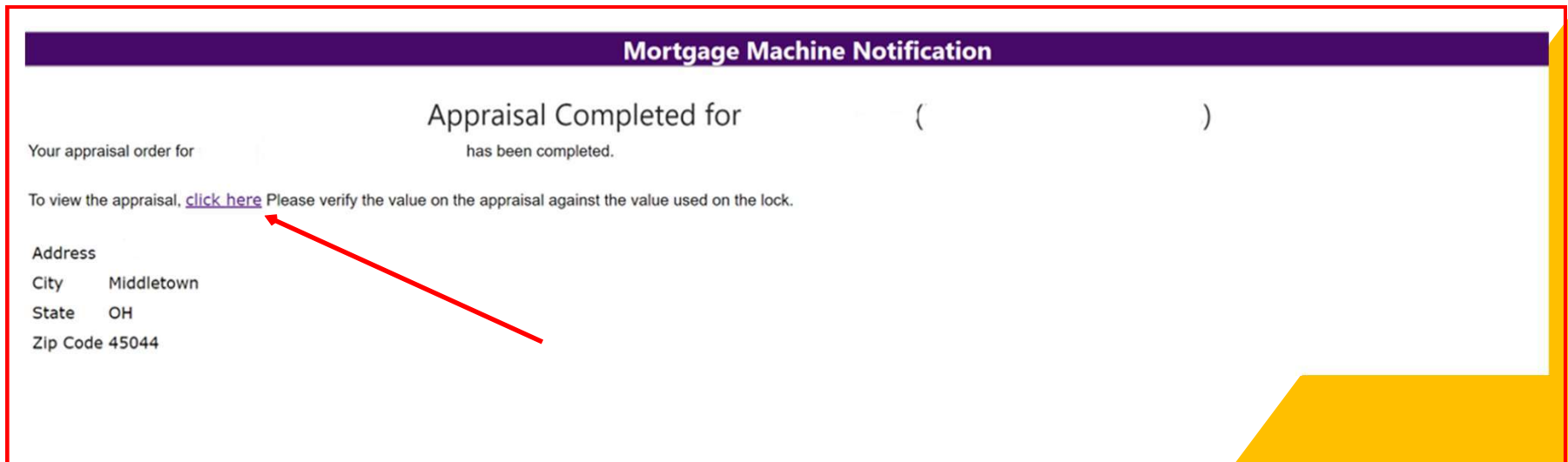
[Click here for the Borrower Appraisal Report Disclosure](#)
[Click here for the Appraisal Value Reconsideration Request Form](#)

[Click here for the Appraisal Receipt](#)

Locate and retrieve the appraisal report once completed

You should receive an e-mail indicating the status of the appraisal has been updated to “Completed” (see sample e-mail below)

If you click on the “Click Here” link below- make sure you are logged into Mortgage Machine for the link to open the loan.




How to locate the appraisal report in Mortgage Machine

Active Loan [\[Import Data | Close Loan\]](#)

Loan Number	1002394713	Estimated Close Date	10/27/2023
Borrower Name	Test Loan	Estimated Funding Date	10/27/2023
Loan Status	Loan Originated	Business Channel	Retail

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- ▶ Overview and Assignments
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- ▶ Loan Status
- ▶ URLA Borrower Information
- ▶ Pipeline and Loan Reports
- ▶ Reporting

 [▶ View in Click n File !\[\]\(31dc830bf8206b94b5a585ce61ce9013_img.jpg\)](#) [▶ Upload Documents](#)

Click n' File
Digital Mortgage Storage

Search Upload Batch

Loan Number: _____

Assets 3
Certificate 3
Closing 4
Construction 8
Credit 8
Disclosures 17
FHA VA Docs 6
Income 4
Junk 13
Other 5
Property 16
QC 7
Submission Checklist 1
TRID 19
Underwriting 16
Unfiled 3
Unassigned 0 - 3

1 4 110%

information. This agency may not conduct or sponsor, and a person is not required to res
displays a valid OMB control number, which can be located on the OMB internet page at I

Privacy Act Information
The information requested on the Uniform Residential Loan Application and this Addendum
U.S.C. § 1701, et seq. The Debt Collection Act of 1982, Pub. L. 97-365, and HUD's Hous
U.S.C. § 3543, require persons applying for a federally insured loan to furnish their SSN. ' your SSN. HUD may conduct a computer match to verify the information you provide. HU
local agencies when relevant to civil, criminal, or regulatory investigations and prosecution
of HUD except as required and permitted by law. The information will be used to determin
any of the requested information, including SSN, may result in disapproval of your loan at
Financial Privacy Act of 1978 that HUD/FHA has a right of access to financial records her
consideration or administration of assistance to you. Financial records involving your trans
notice or authorization but will not be disclosed or released by the institution to another G
except as required or permitted by law.

WARNING: This warning applies to all certifications made in this document.
Anyone who knowingly submits a false claim, or makes false statements is subject to cri
years, fines, and civil penalties. 18 U.S.C. §§ 287, 1001 and 31 U.S.C. §3729

form HUD-92900-A (02/2020) Page 1 of 4

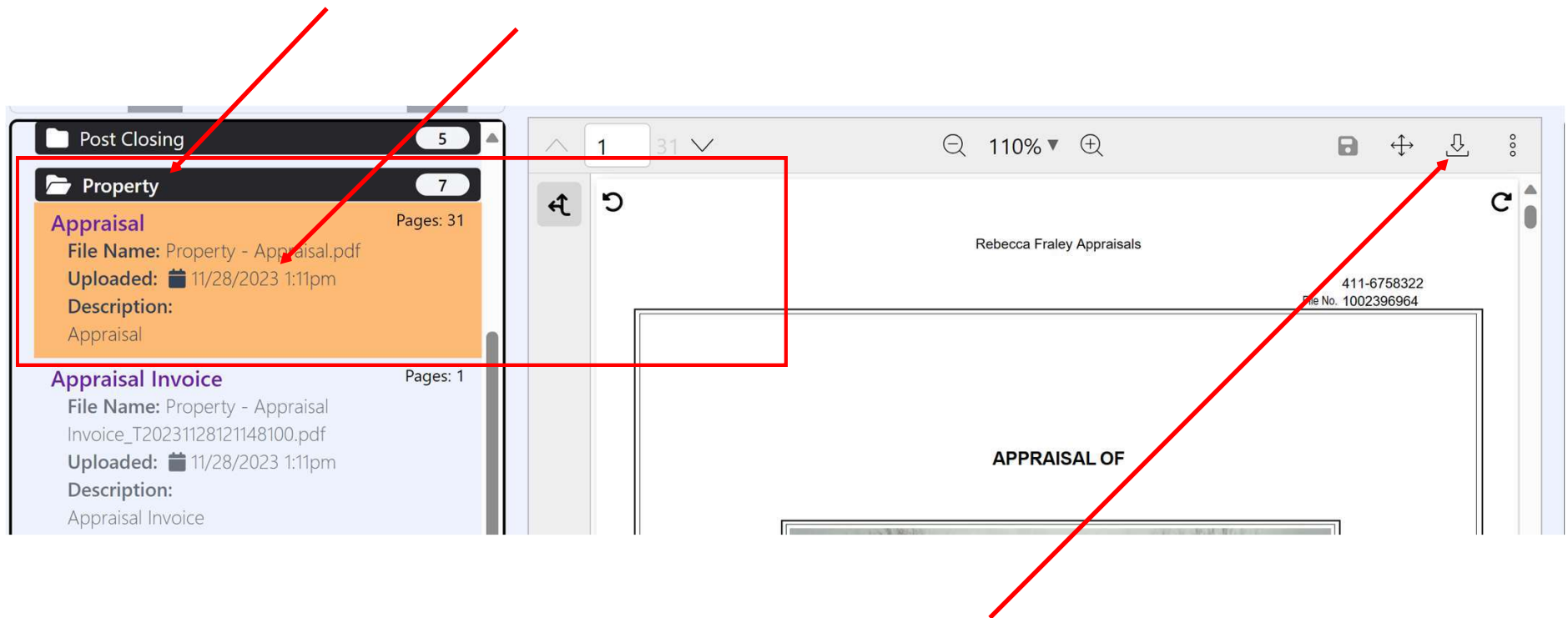
Borrower Name: _____ FH

Caution: Delinquencies, Defaults, Foreclosures and Abuses
Delinquencies, defaults, foreclosures and abuses of mortgage loans involving programs of t
your credit, now and in the future. The Mortgagee in this transaction, its agents and assigns
and assigns are authorized to take any and all of the following actions in the event loan pe
in the attached application: (1) Report your name and account information to a credit burea
the period of time that payment is not made; (3) Assess charges to cover additional admini
service your account; (4) Offset amounts owed to you under other Federal programs; (5) Re
mortgage servicing agency to collect the amount due, foreclose the mortgage, sell the prop

Once Click n' File is open, look for the "Property" tab or the "Unfiled" tab.

Under the “Property” or “Unfiled” tab, you should be able to locate the appraisal report.

Click to open the appraisal report, scroll through and download the report



[Click here to down load the appraisal report](#)