

APPRAISAL ORDERING INSTRUCTIONS:

Navigate to the Pipeline Screen:

Pipelin	e Vie	super Administrator - D	efault View 🗾 🚽 🧿 🗹			
oan Fok	der [My Pipeline	View Al Loans	Company Internal Org	anization 💌 🗚	٩,
iter: No	ne					
4 4 3	301 - 3	35 ▼ of 335 ▷ ▷				
lerts h	viess	Loan Number	Borrower Name 🔺	Loan Amount	Loan Officer	Loan Processor
-	•]]			-		
2		1508EM000318	🤱 Test4, Tony	200,000.00		
2		1508EM000319	🤱 Test5, Tony	200,000.00		
2		1508EM000313	🤱 Test8051, Matt	211,635.00		
		1508EM000321	🚨 Test8052, Matt	188,120.00		
2		1508EM000314	😤 Test8052, Matt	188,120.00		
1		1508EM000320	🤱 Test811, Matt	229,500.00		
3		1508EM000309	🤱 Test84, Matt	229,500.00		
2		1508EM000315	2 Test851229, Matt	215,943.00		
		1305EM000071	🤱 TestFullLestName, TestFu	lin: 375,000.00	🤱 John Smith	
12		1502EM000304	🤱 Testington, James	170,000.00		
12		1409EM000289	Encompass	102,000.00		
12		1409EM000290	🤱 TestRelease2, Encompass	102,000.00		
		3333-555-7777	TestWey123, Test123			
		123-555-6666	TypeId, Product			
		1305EM000073	🤱 VMG, Tracey			
		1309EM000177	🤱 Walker, Jimmy	229,500.00		
12		1408EM000282	S Weatherford, Bond007	170,000.00		
		1405EM000265	🤱 Weatherford, Lisa	12,000.00		
		LinWey222333	🤱 Wey, Lin1 C			
		2223335554	🤱 Wey, Lintest C	345,000.00		
		2223333555	S WeyTest, LinTest	520,000.00		
		1212EM000019	S WeyTest, LinTest C			
		3335551212	2 WeyTest1, LinTest1	569,920.00		
		1302EM000026	& WeyTest1, LinTest1	600,000.00		
		2122-2222-WeyTest2	& WeyTEst2, LinTest			
		1310EM000220	S Williams, Bily Dee	211,100.00		
		1304EM000058	a williams, borrower bil			
-		1405EM000264	2 Willow II, Larabee	12,000.00		
12		1408EM000283	S Wilson, Bond28	170,000.00		
		1405EM000266	S Wilson2, 000bond	12,000.00		
		1306EM000150	S. Wonka, Billy	233,750.00		
		1309EM000161	S. Wonka, Charlie	209,015.00		
		1308EM000151 1308EM000145	S Wonka, Wanda	208,250.00		
		1309EM000204	S Wonka, Willy	221,000.00 233,750.00		
	-	1305EM000204	wonka, wina w	233,750.00		

Select the Loan File you wish to access • In the lower left, select the "Services" tab and click "Order Appraisal" (See screen shot on next page)

Notify Lisers Advanced Search 🕼 🖉 🏠 🗙 🥭 🖼 🔒 🛛 Move to Folder 🔹 Iransfer Current Loan Team Member Last Finished Milest Next Expected Milestone Next Expecte Subject Property Address Subject Property City Subject Property -**X** = * Admin User E Started Qualification 08/10/2015 🙆 126 Main Street Lansdale PA PA Started 🙎 Admin User 08/10/2015 127 Main Street Qualification Lansdale Admin User Started Qualification 08/08/2015 123 E Main St Lansdale PA 🙎 Admin User Started Qualification 08/14/2015 123 E Main St Lansdale PA 🙎 Admin User Started Qualification 08/08/2015 123 E Main St PA Lansdale 😤 Admin User Started Gualification 08/13/2015 1555 Bustard Rd Lansdale PA Admin User Started Qualification 08/07/2015 1555 Bustard Rd PA Lansdale 😤 Admin User Started Gualification 08/08/2015 🙆 123 E Main St Lansdale PA John Smith Started Qualification 3121 Almaden Hwy #330 San Jose CA 🙎 Admin User 03/01/2015 PA Started Qualification borrower Lansdale PA Admin User Started Qualification 09/28/2014 123 borrowing st Lansdale PA 🙎 Admin User Started Qualification 123 borrowing st 09/28/2014 Lansdale Admin User Started Gualification 1238 Hedding Street San Jose CA 🙆 221 Any Street CA 🙎 Admin User Started Qualification Santa Clara Admin User Started Qualification 1964 Hawthorne Ln 🙎 Admin User Started Qualification Hatfield PA Admin User Started Qualification 08/31/2014 Lansdale PA borrower Admin User Started Gualification Borrower Lansdale PA 222 Anywhere Street CA 🙎 Admin User Started Qualification San Jose 😤 Admin User Started Qualification 222 Any Street CA San Jose 222 Hedding Street CA Admin User Started Gualification San Jose 🙎 Admin User Started Qualification 🙆 222 Any STreet San Jose CA Admin User Started Qualification 2323 Any Street Campbell CA 🧟 Admin User Started Qualification 1700 Hedding Street CA San Jose 🖁 Admin User Started Gualification 2122 Any Street Campbell CA C 26 E Broad St PA Admin User Started Qualification Hatfield 😫 Admin User Started Qualification test street Upper Gwynedd PA PA 🤱 Admin User Started Qualification Borrower Lansdale 🤱 Admin User Started Qualification 08/31/2014 PA borrower Lansdale Admin User Started Qualification Borrower Lansdale PA 26 E Broad St PA Admin User Started Qualification Hatfield 🙎 Admin User Started Qualification 🙆 26 E Broad St Hatfield PA Started 🙆 24 E Broad St PA 😤 Admin User Qualification Hattield 🙎 Admin User 🙆 26 E Broad St PA Started Qualification Hatfield 🙆 26 E Broad St Hatfield 🙎 Admin User Started Qualification PA 1246 08/11 13:52* Thursday, 8/13/2015

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	ools Services Help	34010
Home Pipeline Loan Trades Contac	ts Dashboard Reports	
8 Borrowers Global DMS		
🔂 1555 Bustard Road	1st Loan #: 1710000991 LTV: /	Rate: Est Closing Date: //
Lansdale, PA 19446	Loan Amount: DTI: /	🗋 Not Locked 🤱 🔝 FS: Admin User
Alerts & Messages Log	Borrower Summary - Origination	
File Started 10/31/17	Channel	Application Date 10/31/2017
Send to processing	Current Status Active Loan	Date //
Submittal	Current Status Active Loan	
Cond. Approval Resubmittal	Borrower Information	No co-applicant Order Fraud
Approval	Borrower 🔠 🖓	Co-Borrower 📳 관 Copy From Borrower
Ready for Docs		
Docs Out	Туре	Туре
E Funding	First Name Global	First Name
Shipping	Middle	Middle
Purchasing	Last Name DMS Suffix	Last Name Suffix
	SSN 123-45-6789	SSN
	DOB 02/17/1982	DOB //
	Home Phone 877-693-8722	Home Phone
	Work Phone 877-693-8722	
	Cell 877-693-8722	Cell
	Marital Status Unmarried	Marital Status
	Home E-mail productin fo@globaldms.com	Home E-mail
	Work E-mail productin fo@globaldms.com	Work E-mail
Forms Tools Services	Social Security Number Verification	Order SSN Verification Check Status
> Order Credit Report	Borrower	Co-Borrower
» Access Lenders	The Purpose of the Transaction	The Purpose of the Transaction
	Seeking a mortgage from the company	Seeking a mortgage from the company
» Search Product and Pricing	This consent is valid for 60 days	This consent is valid for 60 days
» Request Underwriting	Mortgage Service Banking Service	Mortgage Service Banking Service
» Order Appraisal	Background Check License Requirement	Background Check License Requirement
» Order Flood Certification	Credit Check Other	Credit Check Other





- The API Provider selection screen will then appear
- Select the Global DMS Appraisal Service API

I Providers	:k Submit			
Global DMS Appraisal Se				

• Enter your login information on the Login screen.

🚽 Login		_ 🗆 ×
Please er	nter your login information below	
Company Name:		▼ Clear
User Name:		
i assivoia. j	Remember Me	
	OK	
		1





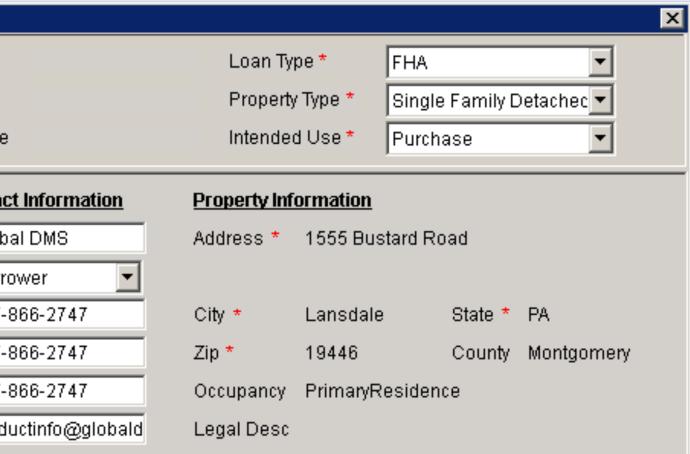
Global DMS Orde	er Status - 3.4.6505.16867		
<u>Loan Info</u>		Loan Amo	unt
Loan #	1710000991	Sales Pric	е
FHA Case #	123-4567890	Estimated	Value
·			
Borrower Infor	mation 🗖 Is Contact	Property (<u>Contact</u>
Name *	Global DMS	Name *	Globa
CoBorr Name		Relation *	Selle
Home	877-693-8722	Home	877-8
Cell	877-693-8722	Cell	877-8
Work	877-693-8722	Work	877-8
Email * produc	tinfo@globaldms.com	Email *	produ

1				
	Global DMS Orde	r Status - 3.4.6505.16867		
	<u>Loan Info</u>		Loan Amo	unt
	Loan #	1710000991	Sales Pric	e
	FHA Case #	123-4567890	Estimated	Value
ľ				
	Borrower Infor	mation 🔽 Is Contact	Property C	<u>contact</u>
	Name *	Global DMS	Name *	Globa
	CoBorr Name		Relation *	Borro
	Home	877-693-8722	Home	877-8
	Cell	877-693-8722	Cell	877-8
	Work	877-693-8722	Work	877-8
	Email * product	info@globaldms.com	Email *	produ

• The "Property Contact Information" will populate from the "Seller's Agent" field

						×	
	Loan Ty	pe *	FHA				
	Property Type *		Single Family Detachec 💌				
ļ	Intende	d Use *	Purchase 💌		•		
at Information	Droportuluf	armation				_	
<u>ct Information</u>	Property Inf	<u>u matun</u>					
al DMS	Address *	1555 Bus	stard Ro	ad			
er's Agent 🛛 💌							
866-2747	City *	Lansdale	!	State *	PA		
866-2747	Zip *	19446		County	Montgomery		
866-2747	Occupancy	PrimaryR	Residence				
uctinfo@globald	Legal Desc						

• If the borrower is the contact, selecting the "Is Contact" checkbox will populate the borrower's information







Once the Order screen is populated, it's ready to be submitted

Global DM	IS Order :	Status -	3.4.6505.	168	67		
Loan Inf	<u>o</u>				l	_oan Amo	unt
Loan #	1	710000	991		8	Sales Pric	е
FHACas	se# 1	23-4567	890		E	Estimated	Value
Borrowe	er Inform	ation 🗆	Is Conta	act	Ē	Property (Contact
Name *	· (Flobal DI	VIS		1	Name *	Globa
CoBorr	Name				F	Relation *	Selle
Home	8	77-693-	8722		ł	Home	877-8
Cell	8	77-693-	8722		(Cell	877-8
Work	8	77-693-	8722		١	Nork	877-8
Email*	productin	fo@glob	aldms.co	m	E	Email *	produ
Appraisa	als						
Report	Type 1 *	1004 S	FR URAF	R FH	IA		
Report	Type 2						
Report	Туре З						
Report	Type 4						
Report	Type 5						
Process	sor 1	Encom	pass Pro	ces	sor 1		
Process	sor 2	Encom	pass Pro	ces	sor 2		
Process	sor 3	Encom	pass Pro	ces	sor 3		
Process	sor 4	Encom	pass Pro	ces	sor 4		
Paymer	nt Type 📩	Credit	Card 💌				
Card Ty	pe *	Visa	•				Na
Credit C	ard # *	401288	8888881	881			Bil
Expiratio	on *	Januar	/ 🔽	I	2019	•	Bil
Get O	rder Info		Save		Clo	ose	Bil

							×
		Loan Ty	pe *	FHA		•	
		Property	/ Type *	Single	e Family D)etachec 🔻	
		Intendeo	d Use *	Purch	ase	•	
t Inforn	<u>nation</u>	Property Inf					
al DMS		Address *	1555 B	ustard Ro	bad		
er's Age							
866-274	47	City *	Lansda	le	State *	PA	
866-274	47	Zip *	19446		County	Montgomery	
866-274	47	Occupancy	Primary	Residen/	ce		
uctinfo@	globald	Legal Desc					
	Messaging	Select				•	
•	Date Needed	10/31/2	017 💌]			
-	Notes / Spec	ial Instruction	s				
~	Notes and s	pecial instruct	tions ent	ered here	9.		
~							-
-							
-	Attachments	File Type	<u> </u>				<u> </u>
-		Name		File Type		Uploade	d By
-	Purc	hase_Agreen	nent.pdf	Purchas	e Agreem	ent	-1
-							
	•						
ame on	Card * Glob	alDMS					
lling Ad	dress* 1555	i Bustard Roa	d				
lling Cit	ty * Lans	dale					
lling Sta	ate * PA	•	Billi	ing Zip *	19446		





After your order is submitted, the "Report Types" and "Processors" that were selected on the Appraisal Order Form screen will be viewable on the "Appraisals" tab

Global DMS Orde	er Status - 3.4.6505.16867							x
<u>Loan Info</u>		Loan Amo	ount		Loan Ty	pe	FHA	
Loan #	1710000991	Sales Prid	ce		Property	/ Туре	Single Fami	ily Detached
FHA Case #	123-4567890	Estimated	d Value		Intende	d Use:	Purchase	
Borrower Information Property Contact Information					Property Inf	ormation		
Name	Global DMS	Name	Global DMS	3	Address	1555 Bus	tard Road	
CoBorr Name		Relation	Realtor					
Home	877-693-8722	Home	877-866-27	47	City	Lansdale	State	e PA
Cell	877-693-8722	Cell	877-866-27	47	Zip	19446	Cou	nty Montgomery
Work	877-693-8722	Work	877-866-27	47	Occupancy	Primary R	Residence	
Email produc	tinfo@globaldms.com	Email p	roductinfo@g	lobaldms.c	Legal Desc			
Appraisals Ac	Iditional Info							
• View Order	O New Order			Messaging	Select			-
Report Type 1	1004 SFR URAR FHA			Date Needed	I			
Report Type 2				Ordered By:	Admin	User		
Report Type 3				Est Completi	on:			
Report Type 4				Actual Comp	letion:			
Report Type 5				Current Statu	s Comments	:	Sta	tus History
Processor 1	Encompass Processor	1	Ľ					<u> </u>
Processor 2	Encompass Processor	2	2					
Processor 3	Encompass Processor	3	Ľ					T
Processor 4	Encompass Processor	4	2	<u>Attachments</u>	File Type			•
Payment Type	Credit Card			👔 + 🛛 File	Name	, F	ile Type	Uploaded By
Notes / Specia	I Instructions				hase_Agreen			
Notes and sp	ecial instructions entered he	ere.	<u> </u>					
			-					
Get Order In	fo Upload (Close		•				Þ



		Leen Arre			Leer To		E110		
<u>Loan Info</u>		Loan Amount			Loan Ty		FHA		
Loan #	1710000991	Sales Pri	ce		Property	/ Туре	Single	Family D	etached
FHA Case #	123-4567890	Estimated Value			Intende	d Use:	Purcha	ase	
Borrower Info	rmation	Property	Contact Infor	mation	Property Inf	ormation			
Name	Global DMS	Name	Global DMS		Address	1555 Bus	stard Ro	oad	
CoBorr Name	•	Relation	Realtor						
Home	877-693-8722	Home	877-866-27	47	City	Lansdale	9	State	PA
Cell	877-693-8722	Cell	877-866-27	47	Zip	19446		County	Montgomery
Work	877-693-8722	Work	877-866-27	47	Occupancy	Primary F	Resider	nce	
Email produ	ctinfo@globaldms.com	Email p	roductinfo@gl	obaldms.c	Legal Desc				
Appraisals A	dditional Info								
View Order	r 🔘 New Order			Messaging	Select				•
Report Type 1	1004 SFR URAR FHA			Date Needed	Select Send Ema	il			
Report Type 2				Ordered By:	Email Log				
Report Type 3	}			Est Completio	on:				
Report Type 4	l .			Actual Compl	etion:				,
								Statue	History

• Emailing the office or vendor, as well as viewing the email log, can be done via the "Messaging" drop-down menu

Send Email			×
Receipient:	Select		•
Subject:	Select Office Vendor		
Body:			
	Send Now		





Checking the status of your order can be done by clicking on the "Additional Info" tab

<u>Loan Info</u>		Loan Amount	Loan Ty	pe	FHA	
Loan #	1710000991	Sales Price	Property	/ Туре	Single Family D)etached
FHA Case #	123-4567890	Estimated Value	Intende	ntended Use: Purchase		
Borrower Info	rmation	Property Contact Information	Property Inf	ormation		
Name	Global DMS	Name Global DMS	Address	1555 Bus	stard Road	
CoBorr Name		Relation Realtor				
Home	877-693-8722	Home 877-866-2747	City	Lansdale	e State	PA
Cell	877-693-8722	Cell 877-866-2747	Zip	19446	County	Montgomery
Work	877-693-8722	Work 877-866-2747	Occupancy	Primary F	Residence	
Email produ	ctinfo@globaldms.com	Email productinfo@globaldms.c	Legal Desc			
Appraisals A	dditional Info					
Order Date	File # 🛆 Status					
10/31/2017	1145311 Scheduled					

You can also check the status by clicking on the "Status History" button

Loon Info		Loan Amo	t		Loop To	no	ΉA	
<u>Loan Info</u>					Loan Ty			
Loan #	1710000991	Sales Pri	ce		Property	/Type S	ingle Family D	etached
FHA Case #	123-4567890	Estimate	d Value		Intende	d Use: P	ourchase?	
Borrower Infor	mation	Property	Contact Infor	mation	Property Inf	ormation		
Name	Global DMS	Name	Global DMS	:	Address	1555 Busta	ard Road	
CoBorr Name		Relation	Realtor					
Home	877-693-8722	Home	877-866-27	47	City	Lansdale	State	PA
Cell	877-693-8722	Cell	877-866-27	47	Zip	19446	County	Montgomery
Work	877-693-8722	Work	877-866-27	47	Occupancy	Primary Re	sidence	
Email produc	tinfo@globaldms.com	Email p	roductinfo@g	lobaldms.c	Legal Desc			
Appraisals Ac	Iditional Info							
View Order	O New Order			Messaging	Select			•
Report Type 1	1004 SFR URAR FHA			Date Needed	I			
report type i								
Report Type 2				Ordered By:	Admin	User		
				Ordered By: Est Completi		User		
Report Type 2				r	on:	User		
Report Type 2 Report Type 3				Est Completi Actual Compl	on:		Status	History
Report Type 2 Report Type 3 Report Type 4	Encompass Processor	·1	Ľ	Est Completi Actual Compl Current Statu	on: letion: s Comments	:	Status port to be deliv	
Report Type 2 Report Type 3 Report Type 4 Report Type 5	Encompass Processor Encompass Processor		e e	Est Completi Actual Compl Current Statu	on: letion: s Comments	:		
Report Type 2 Report Type 3 Report Type 4 Report Type 5 Processor 1	·	2		Est Completi Actual Compl Current Statu	on: letion: s Comments	:		





tatusHistory		
Close Status History		
Date	Status	Message
10/31/2017 6:45:26 AM	Inspected	This property
10/31/2017 6:44:59 AM	Scheduled	Inspection S
10/31/2017 6:44:35 AM	Accepted by Vendor	Appraiser Ac
10/31/2017 6:13:13 AM	Unassigned	File uploade
10/31/2017 6:13:10 AM	Unassigned	Add Order -

rty has been inspected. Report to be delivered today.

X

Scheduled on 10/31/2017 from 1:00 PM to 2:00 PM.

Acceptance

led (via Web Service) by Client

Web Services API by client user: NMEncompass5347.





Syncing the files back into the Encompass eFolder place card(s) is done by:

- 1. Click on the "Services" tab > "Order Appraisal" > select "Global DMS Appraisal Software"
- Log in using your credentials 2.
- 3. Click the "Get Order Info" button at the top left of the window and your files will move directly to the eFolder or to the appropriate place card in the Encompass eFolder

Global DMS Orde	er Status - 3.4.6505.16867								
<u>Loan Info</u>		Loan Amo	ount		Loan Ty	rpe FH	A		
Loan#	1710000991	Sales Prid	ce		Propert	y Type Sin	ngle Family De	etached	
FHA Case #	123-4567890	Estimated	d Value		Intende	d Use: Pu	rchase		
Borrower Infor	mation	Property :	Contact Info	mation	Property Inf	formation			
Name	Global DMS	Name	Global DMS	3	Address	1555 Bustard	d Road		
CoBorr Name		Relation	Realtor						
Home	877-693-8722	Home	877-866-27	47	City	Lansdale	State	PA	
Cell	877-693-8722	Cell	877-866-27	47	Zip	19446	County	Montgome	ry
Work	877-693-8722	Work	877-866-27	47	Occupancy	Primary Resi	idence		
Email produc	tinfo@globaldms.com	Email p	roductinfo@g	lobaldms.c	Legal Desc				
Appraisals Ac	Iditional Info								
• View Order	O New Order			Messaging	Select			•	
Report Type 1	1004 SFR URAR FHA			Date Neede	d				
Report Type 2				Ordered By:	Admir	n User			
Report Type 3				Est Comple	tion:				
Report Type 4				Actual Comp	oletion:				
Report Type 5				Current Stat	us Comments	:	Status	History	
Processor 1	Encompass Processor	1	Ľ	2 Files Upl	oaded by appr	aiser			<u></u>
Processor 2	Encompass Processor	2	2						
Processor 3	Encompass Processor	3	2						-
Processor 4	Encompass Processor	4	2	Attachments	E File Type				•
Payment Type	Credit Card			📑 + 🛛 File	e Name	,			Fi
Notes / Specia	I Instructions					nent20171031	091313.pdf		Pu
Notes and sp	ecial instructions entered h	ere.	<u> </u>		ck_Demo_Eng	agement_Lett	ter201710310	94351.pdf	Vei
			-	App	oraisalReport2	017103110343	32.pdf		Ap
Get Order In	fo Save (Close		Fre	ddie Mac SSR	201710311036	616.pdf		FR▼
Oct Order III	- Juvo								

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Dee	umer		un i a multine l
DUC	unier	nts Preliminary Conditions Underwriting Conditions Pos	t-Closing Conditions History
Do	cum	ents View Standard View	0
Doc	ume	nt Group (All Documents)	Stacking Order
Doc	um	ents (24)	
Att	Fo	Name 🔺	Description
		1003 - URLA	
		Credit Authorization	
		Equal Credit Opportunity Act	
	j	FACT Act Disclosure	
		FHA Amendatory Clause	
		FHA Blanket Signature Authorization	
		FHA Counseling Certification	
		FHA Identity of Interest Certificate	
		FHA Informed Consumer Choice Disclosure	
		FHA SSN Certification Borrower	
		FHA SSN Certification Co-Borrower	
<u>~</u>		GlobalDMS_AppraisalReport20171031103432.pdf	
<u>~</u>		GlobalDMS_EAD SSR20171031103616.pdf	
2		GlobalDMS_Fannie Mae SSR20171031103616.pdf	
		GlobalDMS_Freddie Mac SSR20171031103616.pdf	
		GlobalDMS_Purchase_Agreement.pdf	
~		GlobalDMS_Purchase_Agreement20171031091313.pdf Good Faith Estimate	
		HUD Settlement Cost Booklet	
		HUD-92900-A Addendum	
		IRS 4506 - Request for Copy of Tax Return	
		IRS 4506T - Request for Transcript of Tax Return	
-		Reg-Z Initial Disclosure	

For Borrower Pair	Туре	Access	For Milestone	Status	Date
	•			•	
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			10
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,	· · · · · · · · · · · · · · · · · · ·	2	
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Settlement Service	AC, CL, FN, LD,	Processing	Received	10/31/17
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			1
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			
Global DMS	Standard Form	AC, CL, FN, LD,			

•



Ordering a Second Appraisal/Final Inspection is done by: • Selecting the "New Order" option • Select from the "Report Type 1" drop-down menu

- Select the payment type from the "Payment Type" drop-down menu
- Click the "Save" button

<u>Loan Info</u>		Loan Amo	punt		Loan Ty	pe FHA	ki -	
Loan≢	1710000991	Sales Pri	ce		Property	Type Sing	le Family Detact	hed
FHA Case #	123-4567890	Estimated	d Value		Intende	d Use: Purc	hase	
Borrower Infor	mation	Property	Contact Infor	mation	Property Inf	ormation		
Name	Global DMS	Name	Global DMS	1	Address	1555 Bustard	Road	
CoBorr Name		Relation	Realtor					
Home	877-693-8722	Home	877-866-27	47	City	Lansdale	State PA	
Cell	877-693-8722	Cell	877-866-27	47	Zip	19446	County Mor	ntgomery
Work	877-693-8722	Work	877-866-27	47	Occupancy	Primary Resid	lence	
Email produc	tinfo@globaldms.com	Email p	roductinfo@g	lobaldms.c	Legal Desc			
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CoBorr Name		Relation *	Rea
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Cell	877-693-8722	Cell	877
Work	877-693-8722	Work	877
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The "1st Appraisal Provided" date will be filled in under the "Disclosure Tracking" tool

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8 Borrowers Nick Myhasuk								rishiri
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Lansdale, PA 19446		Loan Amount:	DTI: /		🗋 Not Lo	cked		
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Submittal expected	03/20/17	Intent to Proceed					d LE Receive	ed
Submitter expected	03/20/17	Earliest Fee Collection				SSPL S	ent	
Order Hazard Insurance expected		Earliest Closing				Safe Ha	arbor Sent	
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Resubmittal expected	03/28/17	Estimated Closing]				
Approval expected	03/30/17							
Ready for Docs expected	04/01/17							
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The "Appraisal Information", located under "Underwriter Summary" will be automatically filled in. This includes:

- Appraisal Type
- Original Appraisal
- Appraisal Ordered
- Original Appraisers Value
- Appraisal Completed
- # of Bedrooms

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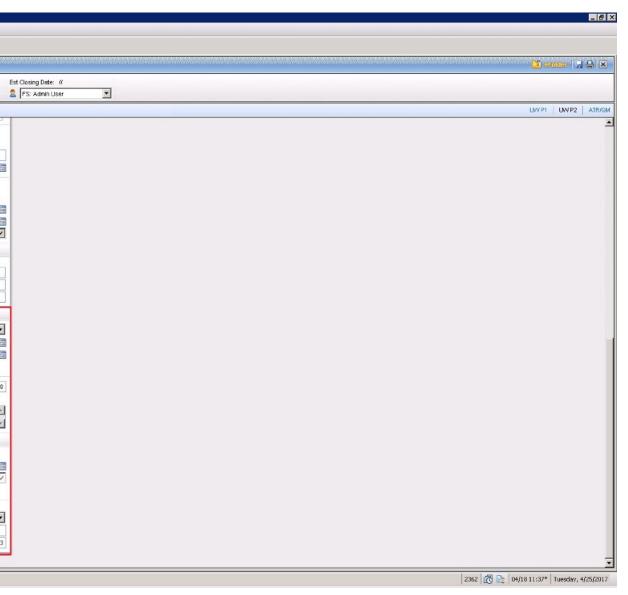
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- Company Name (Appraiser Name)
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Processing expected	04/15/17	Category/Role	Disc. on CD	Company		Name	Work Phone	Email	
	04/15/17	1 Borrower				Bobby Borrower	877-693-8722	b.borrower@globaldms.com	
	04/15/17	2 Co-Borrower							
Obtain Flood Cert and Life of loan	04/17/17	3 Role - File Starter				Admin User	877-866-2747	productinfc@globaldms.com	
	04/17/17	4 Role - Loan Officer (Proces							
Order Appraisal expected	04/17/17	5 Role - Loan Processor (Sub							
Submit MI Application expected	04/19/17	6 Role - Underwriter (Cond. A							
Submittal expected 4506T expected	04/22/17	7 Role - Loan Processor (Res							
	04/22/17 04/22/17	8 Role - Underwriter (Approva							
Cond. Approval expected	04/22/17	9 Role - Loan Processor (Rea							
Conta, Approval expected	04123117	10 Role - Closer (Docs Out)							
		11 Role - Funder (Funding)							
		12 Role - Shipper (Shipping)							
		13 Role - Post Closer (Purchas							
		14 Role - Lock Desk 15 Role - Accounting							
		16 Role - Loan Opener							
		17 Lender							
		18 Appraiser		Global DMS					
		19 Escrow Company		GIODAI DIVIS					
		20 Title Insurance Company							
		21 Buyer's Attorney							
Forms Tools Services		22 Seller's Attorney							
		23 Buyer's Agent							
ile Contacts	-	24 Seler's Agent							
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Conversation Log IPO Information		26 Seler 2							
ro information orrespondent Loan Status					1			¥ minin x	
aska		Appraiser							Copy to Settlement Service Provider
AUS Tracking					4				
Visclosure Tracking				~	Agent Name				
ee Variance Worksheet		Company Name Globa	IDMS	B	Phone		<u> </u>		
O Compensation		Address			Email				
nti-Steering Safe Harbor Disclosure		City			Fax		8		
et Tangible Benefit		State	Zip		Cell				
ompliance Review		Relationship				1132483			
CS Data Viewer					Appraisal #	1132483			
QL Services		Line Item Number			Comments				
tatus Online		Company License # PA 13	1415161718		Contact License #				
kmortization Schedule		Lic. Issuing Authority Name			Lic. Issuing Authori	ty Name			
Co-Mortgagors		Lic. Authority Type		\checkmark	Lic. Authority Type				
liggyback Loans		Lic. Authority State Code			Lic. Authority State	Code			
Secure Form Transfer	-								
Show in Alpha Order		Lic. Issue Date //			Lic. Issue Date	//	1		
					•				
									🔂 📴 04/18 11:37* Tuesday, 4/25



The **Appraiser** information under **File Contacts** will be automatically filled in. This includes:





Pre-Scheduler Tool & Encompass® Integration:

eTrac's Pre-Scheduler app is also available within the platform's Encompass integration. Those that utilize this integration can access the app directly from their native Encompass interface to select between 1 to 3 property appraisal appointment dates per order that an appraisal is to be completed by. Once the dates have been selected, the information is immediately sent to eTrac. The system then automatically searches for applicable appraisers that could complete the order. The order, including the specified dates, is then instantly broadcast to these appraisers for optimal assignment. If an appraiser wishes to accept the order, they must first select and agree to one of the required appraisal appointment dates.

How to Use Pre-Scheduler with Encompass:

- Verify that the Pre-Scheduler app is enabled within your eTrac system
- Open the Encompass application
- Create a new order
- Select "Order Appraisal"
- Locate the "Pre-Scheduling" button (directly below the "Messaging" drop-down menu)

ilobal DMS Ord	er Status - 3.4.6828.2804	8						
<u>Loan Info</u>		Loan Amount	:		Loan Ty	rpe * Co	nventional	•
Loan #	1811001166	Sales Price			Propert	y Type * Sir	igle Family (Detachec 💌
FHA Case #		Estimated Va	lue		Intende	d Use *		-
Borrower Info	rmation 🔽 Is Contact	Property Con	itact Info	mation	Property Inf	formation		
Name *	Marge Simpson	Name * 🛛 M	arge Sim	pson	Address *	1313 Mocking	bird Lane	
CoBorr Name		Relation * B	orrower	-				
Home	215-554-1122	Home 21	15-554-11	22	City *	Lansdale	State *	PA
Cell	215-555-1236	Cell 21	15-555-1:	236	Zip *	19446	County	Montgomery
Work	215-555-5555	Work 21	15-555-5	555	Occupancy			
Email * marge	@email.com	Email * 🛛 m	narge@er	nail.com	Legal Desc			
Report Type 1 Report Type 2		lict	• •		d: <u> 117_172</u>		-Scheduling	Scheduled
Ronart Type 1	* Regression 9.0 Produ	uet	-	Date Needer	d: 🔲 11/ 1/2	2018 • Pre	Schoduling	Scheduled
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Report Type 3			-					<u> </u>
Report Type 4	· · · · · · · · · · · · · · · · · · ·		-					v
Report Type 5			-	Attachments	File Type			
Processor 1			•		Name	File T	Tuno	Upload
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Processor 3			-					
Processor 4			<u>~</u>		_	_	_	Þ
Payment Type	e * Bill 💌							





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Pre-Schedu	led Dates	
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Option 2		 Start Ti
Option 3		 Start Ti
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Pre-Schedul	ed Dates	
Option 1		4
Option 2		Sun M
Option 3		4 11 18 25 2

Select the "Start Time" via its drop-down menu

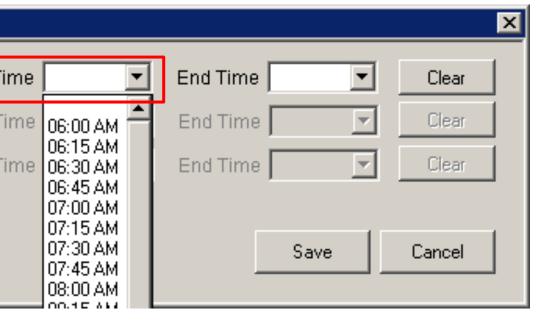
Pre-Schedu	iled Dates		
Option 1	11/27/2018		Start T
Option 2			Start T
Option 3		•	Start T

Click on the "Pre-Scheduling" button (a "Pre-Scheduled Dates" window will then open)

				×
me 💌	End Time	•	Clear	
me 🔽	End Time	v	Clear	
me 🔽	End Time	v	Clear	
		Save	Cancel	
	_			

selecting a date in the "Option 1" row via the calendar tool

										×
N	ove	mber,	201	8	Þ	э		•	Clear	
1on	Tue	Wed	Thu	Fri	Sat	e		Ţ	Clear	
			1	2	3	6	1			
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12	13	14	15	16	17		,	_		
19	20	21	22	23	24					
26	27	28	29	30	1			11		
3	4	5	6	- 7	8		Save		Cancel	
Today: 11/1/2018					8	_				







Select the "End Time" the same way via its drop-down menu

- "Option 2" will then become available follow the same steps
- "Option 3" will then become available follow the same steps
- If necessary, users can clear these fields by clicking the adjacent "Clear" button
- NOTE: "Option 2" and "Option 3" will not become available until the proceeding option has been completed.
- Click on the "Save" button to save your pre-scheduled dates and times to the order
- To cancel, click the "Cancel" button this will close the application without saving any entries

When one or more dates have been saved to the order, the "Scheduled" checkbox will then be checked:

oon lufe		Loop Ares	t		Loop Tr	no t		
<u>Loan Info</u>		Loan Amo			Loan Ty		nventional	
Loan#	1811001166	Sales Pric			Property		igle Family D	
FHA Case #		Estimated	d Value		Intende	dUse*		_
Borrower Infor	mation 🔽 Is Contact	Property -	Contact Info	mation	Property Inf	ormation		
Name *	Marge Simpson	Name *	Marge Sim	pson	Address *	1313 Mocking	bird Lane	
CoBorr Name		Relation *	Borrower	-				
Home	215-554-1122	Home	215-554-11	22	City *	Lansdale	State *	PA
Cell	215-555-1236	Cell	215-555-13	236	Zip *	19446	County	Montgomery
Work	215-555-5555	Work	215-555-5	555	Occupancy			
Email * marge(@email.com	Email *	marge@er	nail.com	Legal Desc			
Report Type 3 Report Type 4 Report Type 5			* *					
Processor 1			<u> </u>	<u>Attachments</u>	File Type			
Processor 2				👔 + 🛛 File	Name	File	Туре	Uple
Processor 3			-					
Processor 4			-	· _				
Payment Type	* Bill 🔻			•				
Get Order Inf	fo Save	Close						





After submitting the order, the user will still be able to view the pre-scheduled dates and times, but these cannot be changed:

alobal DMS Orde	r Status - 3.4.6828.28048		
<u>Loan Info</u>		Loan An	nount
Loan #	1811001166	Sales P	rice
FHA Case #		Estimat	ed Valu
Borrower Infor	mation	Propert	y Conta
Name	Marge Simpson	Name	Mar
CoBorr Name		Relation	Bor
Home	215-554-1122	Home	215
Cell	215-555-1236	Cell	215
Work	215-555-5555	Work	215
Email marge(ලුemail.com	Email	marge
Appraisals Ad	ditional Info		
• View Order	C New Order		
Report Type 1	Regression 9.0 Product	t	
Report Type 2			
Report Type 3			
Report Type 4			
Report Type 5			
Processor 1			[
Processor 2			
Processor 3			
Processor 4			
Payment Type	Bill		
Notes / Specia	Instructions		
Testing Client	Instructions 9.1 Staging		

In order to view or change the pre-scheduled dates BEFORE submitting the order, the user must click on the "Pre-Scheduling" button.

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		Loan Ty;	Conventional				
		Property	Туре	Single	e Family D	etached	
9		Intendeo	i Use:	Purch	nase		
ct Inform	nation	Property Info	ormation				
je Simps		Address			ird Lane		
ower				5			
554-1123	2	City	Lansdal	le	State	PA	
555-123	6	Zip	19446		County	Montgom	ery
555-555	5	Occupancy					
මුemail.c	om	Legal Desc					
	Messaging	Select				•	
I	Date Needed:	11/1/2018		Pre-8	Scheduled	Inspection	n <u>Dates</u>
1	Ordered By: 🕖	Admin User		1: 11/	27/2018 10	0:15 AM to	12:00 PM
	Est Completic	on:		2: 11/:	3:15 PM		
	Actual Comple	etion:		3: 11/:	0:30 AM		
1	Current Status	s Comments:			Status	History	
3							
							-
	<u>Attachments</u>	File Type					-
	A + File I	Name		File Ty	pe		Upload
	-						
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Activating eTrac Pre-Scheduler:

To begin utilizing eTrac's Pre-Scheduler tool, please contact our Technical Support Department to have the app enabled within your system.

Please do not hesitate to contact eTrac Support for more information or if you need additional help. Call 877-866-2747 and select option 3 email: help@myetrac.com



