

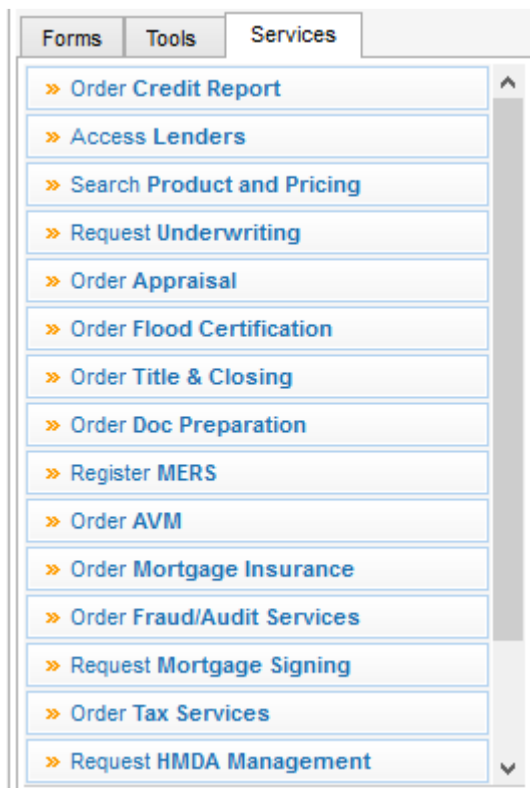
## Using Heartland Valuation Service Software Appraisal Integration in Encompass 360

Lenders can utilize the new **Heartland Valuation** Software Appraisal Integration to submit Appraisal orders electronically from Encompass and obtain status updates and retrieve completed order details and documents.

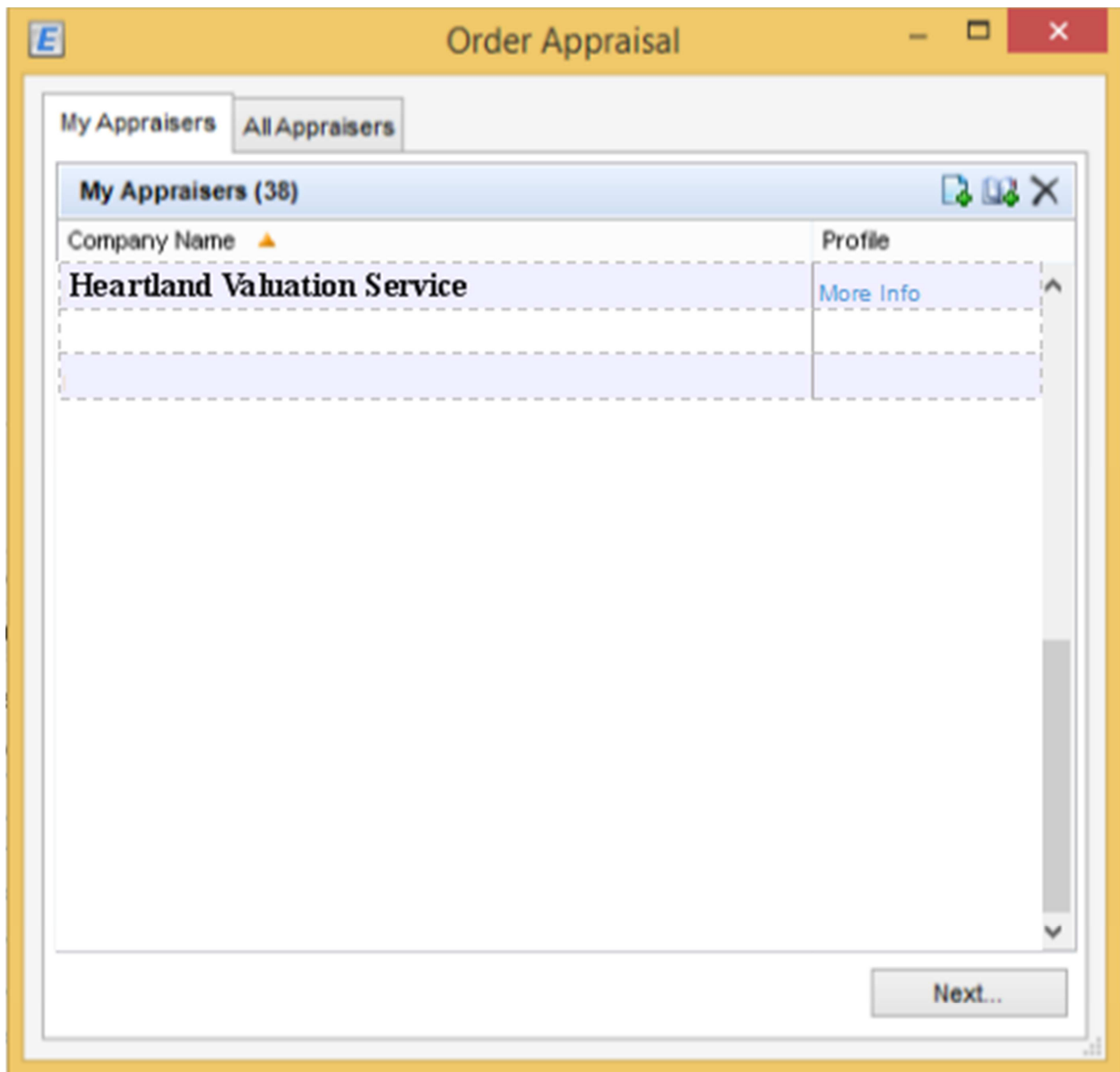
To access the integration and be able to submit appraisal orders, lenders must obtain credentials (username, and password) from preferred Service Provider.

### Order Submission

To submit an appraisal order from within Encompass, first open the loan file, click on the **Services** tab on the lower left and then click on **Order Appraisal**.



From the **My Appraisers** list, select your “Heartland Valuation Service Provider” and click **Next**. If they are not listed in your **My Appraisers** list, click on the **All Appraisers** tab and search for it in the list of Matching Appraisers and then click on **Add to My Appraisers**.



The **Heartland Valuation** Connection Integration Appraisal Order User Interface (UI) will be displayed. If your client credentials have already been entered and saved, Encompass will retrieve the possible values for Company ID, Loan Officer or Loan Processor, Product List, Property Type and Payment types and display it in the order UI. If you are entering the order UI for the first time, you have to enter the user name, password and click on the **Login** button to retrieve the settings. You can check the “Save Login Information” checkbox to remember your credentials so that you do not have to enter them each time.

Note: Client credentials are supplied by your Preferred Service Provider. If you are a new user, you can contact your Preferred Service Provider to setup your credentials; or for existing clients, they can help you reset your password.

## Appraisal Form

**Heartland**  
Valuation Service LLC

## Appraisal Order Form

<https://demo8-staging.myvalutrac.com/api/encompass.asmx>

## Login Information

User ID: Password: ☒ Save Login Information

## Loan Information

Borrower: FHA Fixed Example

Co-Borrower: FHA Fixed2 Example

Property Address: 123 Any Street  
Santa Clara CA 95050

Loan #: 123456

☒ New Order ☐ Existing Order

## Company Information

Company ID: Loan Officer: Processor: 

## Order Appraisal

Payment

Notes

Status / Dates

## Appraisal Product

Product: Loan Purpose: Loan Type: Property Type: Occupancy: Purchase Price: 

## Contact

Access Contact: Name: Home Phone: Work Phone: Mobile Phone: Due Date: 

## Attachments

☐ eFolder☒ My Computer

Select File

Document Type:

Order Appraisal

Close

The Order UI will also be prepopulated with data from the loan file. There are certain required fields that should be completed prior to submitting an order and if those fields are missing, Encompass will indicate with a red exclamation mark. See example in the screen shot above where the loan is a FHA and the FHA Case number is missing in the loan file. User will have to close the UI and complete the FHA Case number prior to submitting the order.

The Loan Purpose and Loan Type will be defaulted if the value in the loan matches any of the options provided by your Preferred Service Provider.

The **Appraisal Product** section will contain all values available, dependent on the Company ID selected for the order, and the prepopulated information. Clicking the drop downs will reveal the available options.

The screenshot displays a web form for creating an order. It is divided into three main sections: Company Information, Appraisal Product, and Contact. The 'Company Information' section at the top includes fields for 'Company ID' (set to 'Bank #1') and 'Loan Officer'. Below it are 'Processor' and 'Due Date' fields. The 'Appraisal Product' section, highlighted with a red box, contains dropdown menus for 'Product', 'Loan Purpose' (set to 'Purchase'), 'Loan Type' (set to 'FHA'), 'Property Type', and 'Occupancy' (set to 'Primary'). It also has a 'Purchase Price' field set to '60000.00'. The 'Contact' section on the right includes an 'Access Contact' dropdown (set to 'Co-Borrower'), a 'Name' field (set to 'FHA Fixed Example'), and phone number fields for 'Home Phone' ((111) 222-3333), 'Work Phone' ((555) 555-5546), and 'Mobile Phone'. A red box also highlights the 'Appraisal Product' section. Red exclamation marks are visible next to the 'Product' and 'Property Type' dropdowns, and next to the 'Due Date' field.

The **Contacts** section allows the user to select the access contact, with information pre-populated from Encompass. This includes the Borrower, Co-borrower, Realtor or Other person.

This screenshot shows the same form as the previous one, but with a different red box highlighting the 'Contact' section. The 'Appraisal Product' section remains visible on the left. The 'Contact' section, highlighted with a red box, shows the 'Access Contact' dropdown (set to 'Co-Borrower'), the 'Name' field (set to 'FHA Fixed Example'), and the phone number fields. Red exclamation marks are present next to the 'Access Contact' dropdown, the 'Name' field, and the 'Home Phone', 'Work Phone', and 'Mobile Phone' fields. The 'Due Date' field also has a red exclamation mark.

In addition to the Contact information, the **Due Date** for the Appraisal Order can be set here as well.

Visit the **Payment Tab** to submit the payment information for the order.

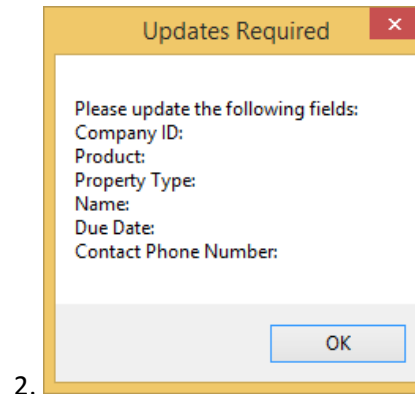
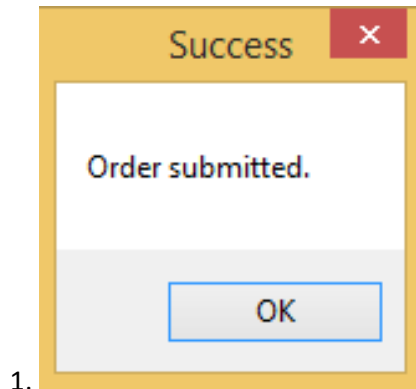
The available payment options for the selected client group are listed in the Payment Type drop down. After payment details have been added, click on the **Order Appraisal** button to submit the order.

Note: The credit card details are not stored in Encompass and are transmitted securely over the internet to your Preferred Service Provider's Merchant Account Services.

The screenshot shows a software interface with four tabs: "Order Appraisal", "Payment", "Notes", and "Status / Dates". The "Payment" tab is active. It contains the following fields and controls:

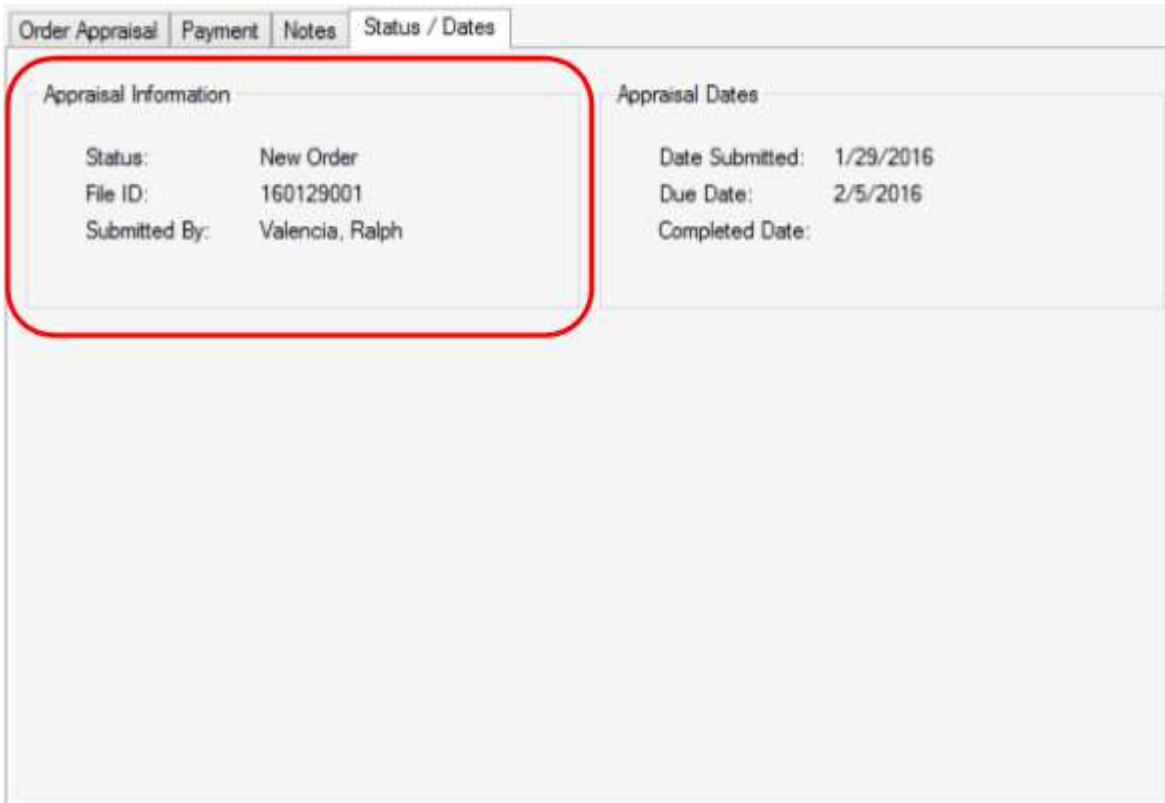
- Payment Method:** A dropdown menu currently set to "Credit Card".
- Company Due:** A text input field containing "150.00".
- Credit Card Information:** A section containing several fields:
  - Credit Card Type:** A dropdown menu currently set to "Master Card".
  - Amount:** A text input field containing "150.00".
  - Cardholder First Name:** An empty text input field with a red asterisk (\*) to its right.
  - Cardholder Last Name:** An empty text input field with a red asterisk (\*) to its right.
  - Credit Card Number:** An empty text input field with a red asterisk (\*) to its right.
  - Expiration Date:** Two dropdown menus separated by a slash (/), with the second dropdown set to "2016". A red asterisk (\*) is to the right.
  - Security Code:** An empty text input field with a red asterisk (\*) to its right.
  - Billing Street Address:** A long empty text input field with a red asterisk (\*) to its right.
  - Billing Zip Code:** A short empty text input field with a red asterisk (\*) to its right.

If the order submission is successful a confirmation popup is displayed [Image 1]; Otherwise an error message is displayed which will indicate the reason why the order failed [Image 2].



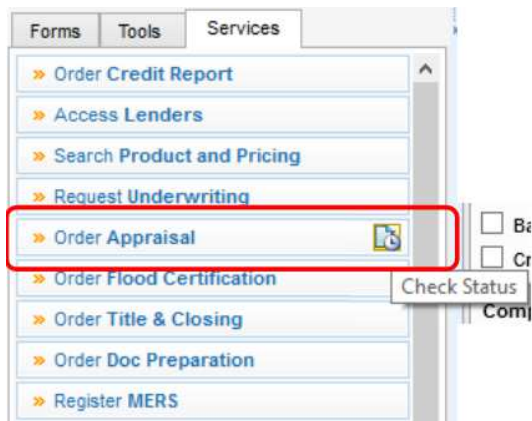
## Check Order Status

The first approach to checking the status of an order is to click on the **Services > Order Appraisal** and opening the **Heartland Valuation** Software Appraisal Integration and selecting the **Status / Dates** tab. Encompass will show the latest status from your Preferred Service Provider and display it in the Appraisal Information section.

A screenshot of a software interface with four tabs: "Order Appraisal", "Payment", "Notes", and "Status / Dates". The "Status / Dates" tab is active. It contains two sections: "Appraisal Information" and "Appraisal Dates". The "Appraisal Information" section is highlighted with a red rounded rectangle. It contains the following data: Status: New Order, File ID: 160129001, Submitted By: Valencia, Ralph. The "Appraisal Dates" section contains: Date Submitted: 1/29/2016, Due Date: 2/5/2016, and Completed Date: (empty).

Appraisal Information		Appraisal Dates	
Status:	New Order	Date Submitted:	1/29/2016
File ID:	160129001	Due Date:	2/5/2016
Submitted By:	Valencia, Ralph	Completed Date:	

The second approach to checking the status of an order is to click on the paper icon in the Services Tab with a timer on it to check the status of the appraisal order for that loan.



This will open the Encompass Appraisal Order Status windows listing the Appraisal orders that have been placed for that loan. Click on the [Retrieve](#) hyperlink to retrieve the status of the selected order or click on the [View](#) hyperlink to retrieve the attachments of the selected order if the order has already been completed. Encompass will automatically open the correct appraisal integration and retrieve the status of the order for you.

Orders (4)							
Order Date ▼	User ID	Appraiser	Appraisal Type	Order Type	Due Date	Status	Order Update
1/29/2016 2:32 PM	ralph			Approved Appraiser or AMC		Requested	<a href="#">Retrieve</a> <a href="#">View</a>
1/29/2016 2:32 PM	ralph			Approved Appraiser or AMC		Requested	<a href="#">Retrieve</a> <a href="#">View</a>
9/11/2015 4:38 PM	ralph			Approved Appraiser or AMC		expected!	<a href="#">Retrieve</a> <a href="#">View</a>
9/11/2015 4:38 PM	ralph			Approved Appraiser or AMC		expected!	<a href="#">Retrieve</a> <a href="#">View</a>

Note: A User can also use this section to retrieve files on a Completed Appraisal, in addition to the Retrieve button on page 11.

## Upload Documents

Documents can be uploaded to your Preferred Service Provider as part of the initial order submission or as an update to an existing order.

Whether it is for a new order, or an existing order; under the Order Appraisal > Attachments section, the user can select the location of the file from the eFolder or from My Computer. If the eFolder option is selected, the user can select each document with a check mark and assign a Document Type to the file.

Attachments

☒ eFolder ☐ My Computer

	Name	Document Type
<input type="checkbox"/>	TestDoc.pdf	
<input type="checkbox"/>	agreement_964850.pdf	
<input checked="" type="checkbox"/>	TestDoc.pdf	Compliance Cert

Retrieve Files Upload

If the user selects My Computer, they will need to click the Select File button, and navigate to the appropriate folder location, click on the document they want to upload and click the Open button. This will add a path to the file's location.

Attachments

☐ eFolder ☒ My Computer

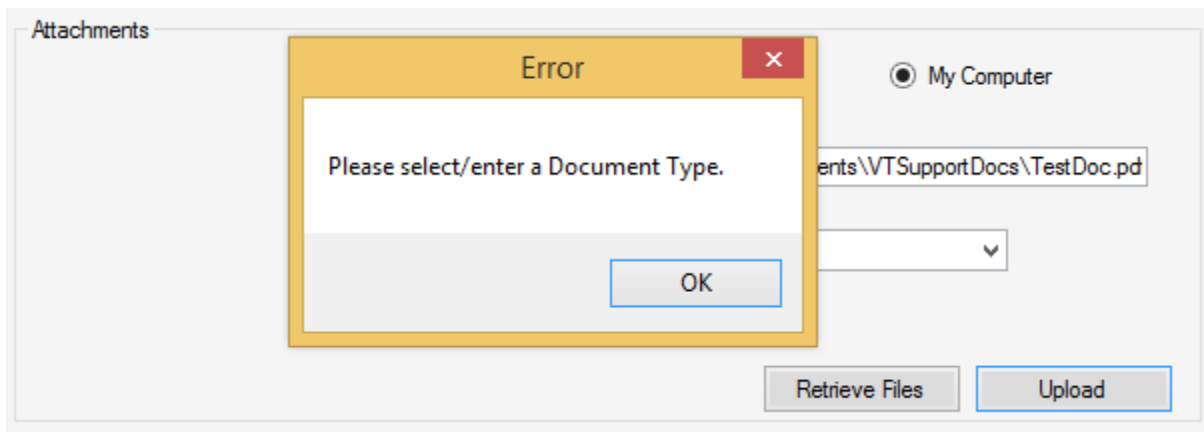
Select File C:\Users\ralph\Documents\VTSupportDocs\TestDoc.pdf

Document Type:

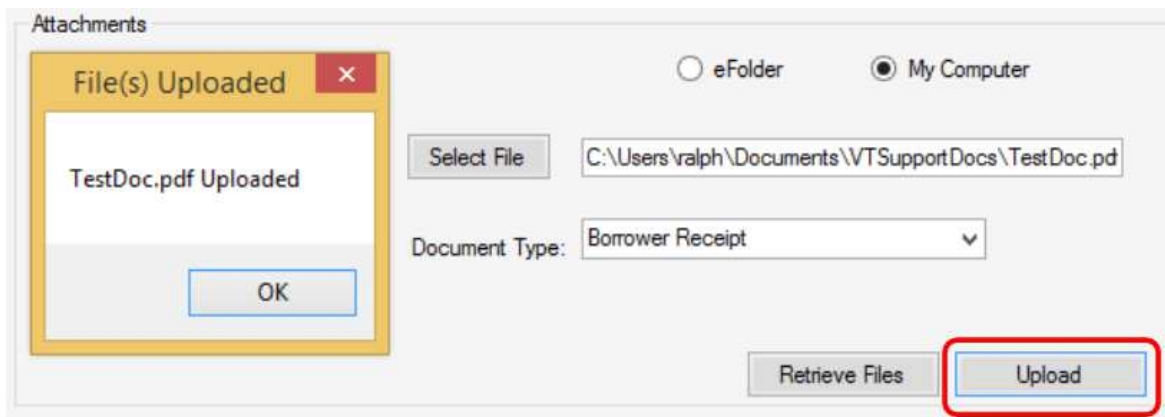
Retrieve Files Upload

The user will also need to select a Document Type from the drop down list, otherwise the user will see an error popup message requesting the user to select/enter a Document Type.





Once the Document Type has been selected and the Upload button clicked, the user will see a popup indicating the upload was successful.



Click OK to close the window and return to the Order Appraisal tab.

If a document is being uploaded for an existing order, select the existing order in the Order UI first and then follow the steps above to attach the documents to that order.

Loan Information

Borrower:	Encompass Test1
Co-Borrower:	Encompass1 Test1
Property Address:	123 Easy Street Dublin CA 94568
Loan #:	987654

☐ New Order ☒ Existing Order

964850 - FNMA 1004 - URAR
964850 - FNMA 1004 - URAR
964852 - FNMA 1004 - URAR
964854 - FNMA 1004 - URAR
964849 - FNMA 1004 USDA

## Client Communication

Clients can send notes or request status on an order by clicking on the **Notes** tab of the Order UI for a selected order.

Order Appraisal Payment **Notes** Status / Dates

Notes

From: Support, ValuTrac on [1/13/2016 3:39 PM]  
test 2

From: Support, ValuTrac on [1/13/2016 3:39 PM]  
test from vt

From: Support, ValuTrac on [1/13/2016 3:38 PM]  
test

Refresh Notes

New Note Entry

Add Note

To Add a new note, the user can type into the “New Note Entry” section and click on the **Add Note** button. If your Preferred Service Provider responds immediately, the user can click on the **Refresh Notes** to retrieve any new notes being sent back.

## Retrieve completed order details and documents

When an order has been set to a status of Complete, the user will receive an email notification.

The user can then use the Appraisal Order User Interface to retrieve the associated documents. On the Order Appraisal > Attachments section, the user can click on the Retrieve Files button to import the associated appraisal documents.

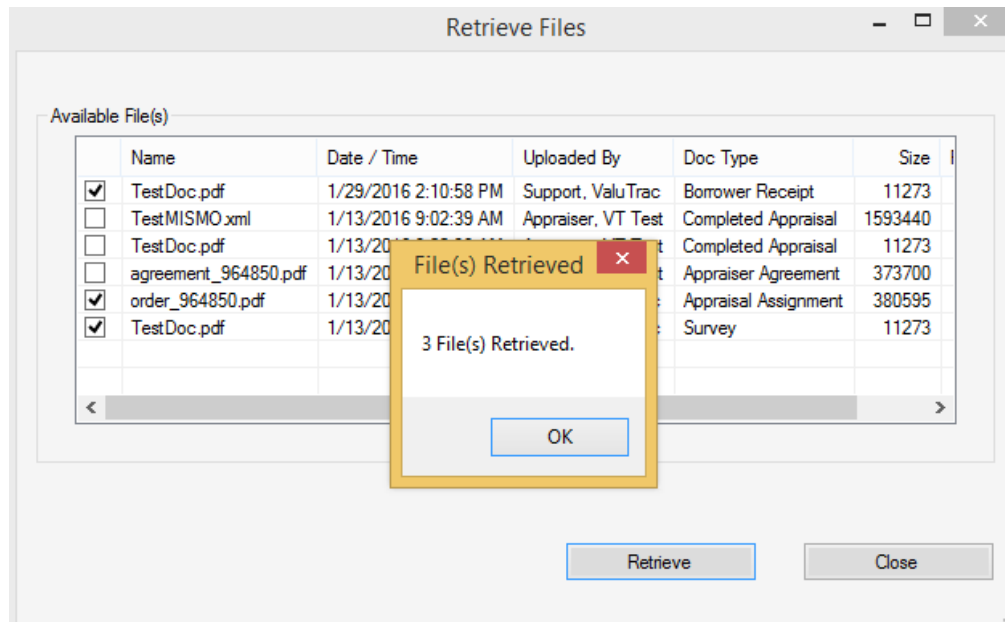
The screenshot shows the 'Order Appraisal' window with the 'Attachments' tab selected. The 'Attachments' section includes radio buttons for 'eFolder' and 'My Computer' (selected). Below these are a 'Select File' button, a text input field, and a 'Document Type' dropdown. At the bottom right, the 'Retrieve Files' button is highlighted with a red rectangle, next to an 'Upload' button.


Once the user clicks the Retrieve Files button, they will see a popup window with all available documents. The user can select which documents to retrieve by checking the appropriate box.

The 'Retrieve Files' popup window displays a table of available files. The table has columns for Name, Date / Time, Uploaded By, Doc Type, and Size. Each row has a checkbox in the first column for selection. The 'Retrieve' and 'Close' buttons are at the bottom.

	Name	Date / Time	Uploaded By	Doc Type	Size
<input checked="" type="checkbox"/>	TestDoc.pdf	1/29/2016 2:10:58 PM	Support, ValuTrac	Borrower Receipt	11273
<input type="checkbox"/>	TestMISMO.xml	1/13/2016 9:02:39 AM	Appraiser, VT Test	Completed Appraisal	1593440
<input type="checkbox"/>	TestDoc.pdf	1/13/2016 9:02:38 AM	Appraiser, VT Test	Completed Appraisal	11273
<input type="checkbox"/>	agreement_964850.pdf	1/13/2016 8:59:33 AM	Appraiser, VT Test	Appraiser Agreement	373700
<input checked="" type="checkbox"/>	order_964850.pdf	1/13/2016 8:59:10 AM	Support, ValuTrac	Appraisal Assignment	380595
<input checked="" type="checkbox"/>	TestDoc.pdf	1/13/2016 8:40:45 AM	Support, ValuTrac	Survey	11273

Once the user clicks on the Retrieve button, a popup window will indicate how many files were successfully retrieved.




The Appraisal report is stored automatically in the eFolder and you can revisit the appraisal report by either clicking on the eFolder icon  in the Encompass main window or by clicking on the View Documents in eFolder button in the integration UI which will open the report in the eFolder window.

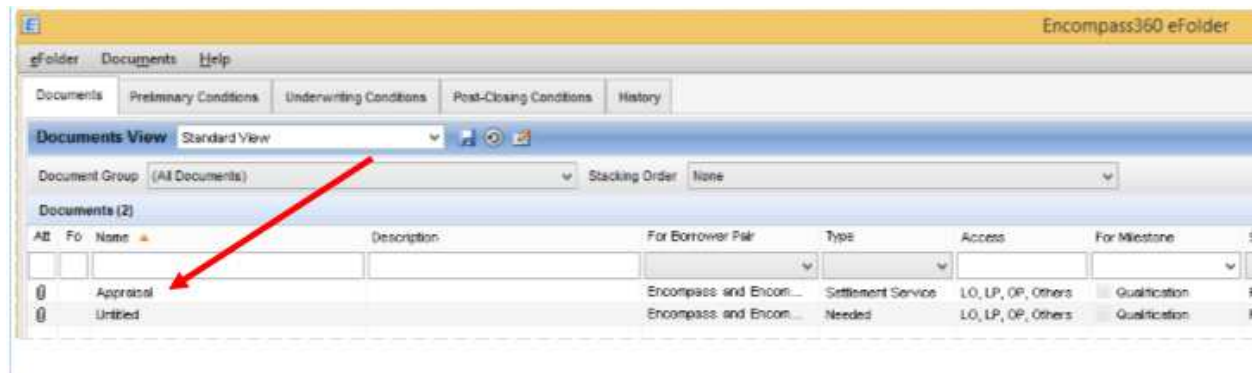
**\*The Appraisal XML is automatically saved in the Encompass Loan folder.**

## Revisions

If a revision was requested and new appraisal documents or updates to an existing appraisal are available for an existing order, the user should be able to select the order and repeat the above steps to obtain the updated appraisal documents.

## Managing documents in eFolder

Encompass eFolder provides a central location for accessing and managing the electronic files and documents associated with a loan. Appraisal reports can be reviewed by accessing eFolder directly from the  eFolder icon in the upper right corner of your Encompass screen. The electronic version of the document and the date and time when it was received is stored in the eFolder.



Double clicking the Appraisal will open the Document in the Encompass eViewer.

