



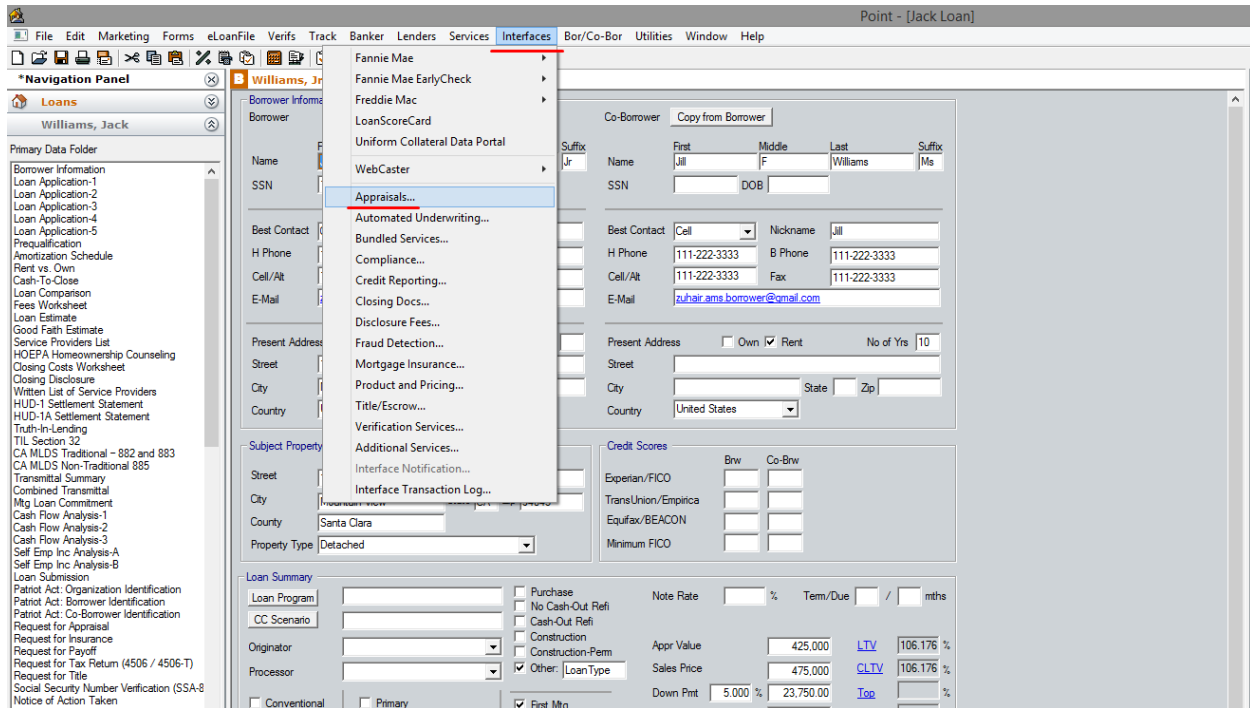
## **Calyx Ordering Instructions**

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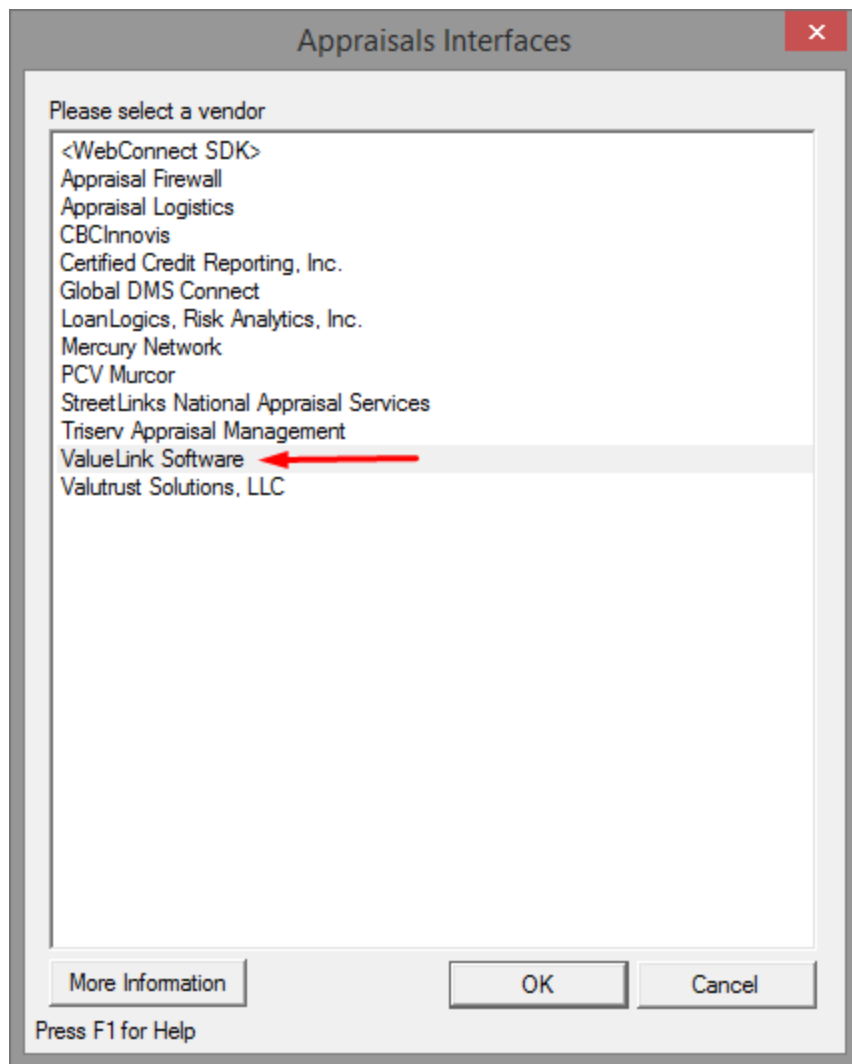
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# Initial Setup

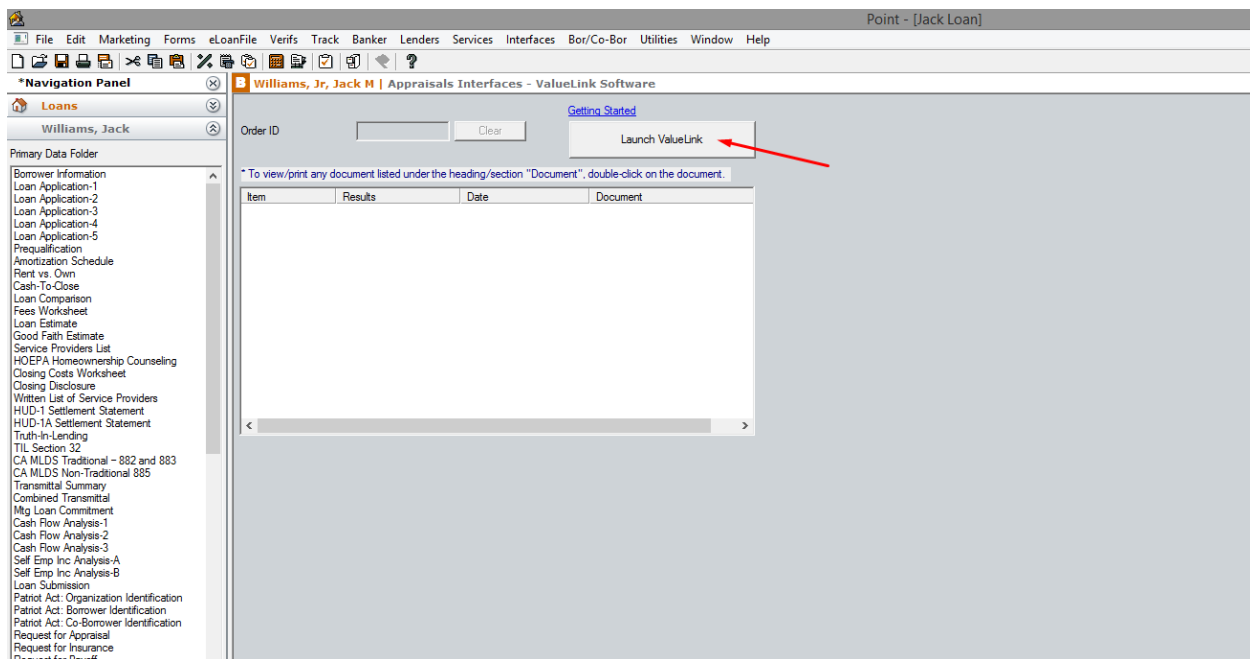
Step 1: Once the loan file is opened in the Calyx system, click “Interfaces” in the menu bar and click “Appraisals” in the drop-down menu.



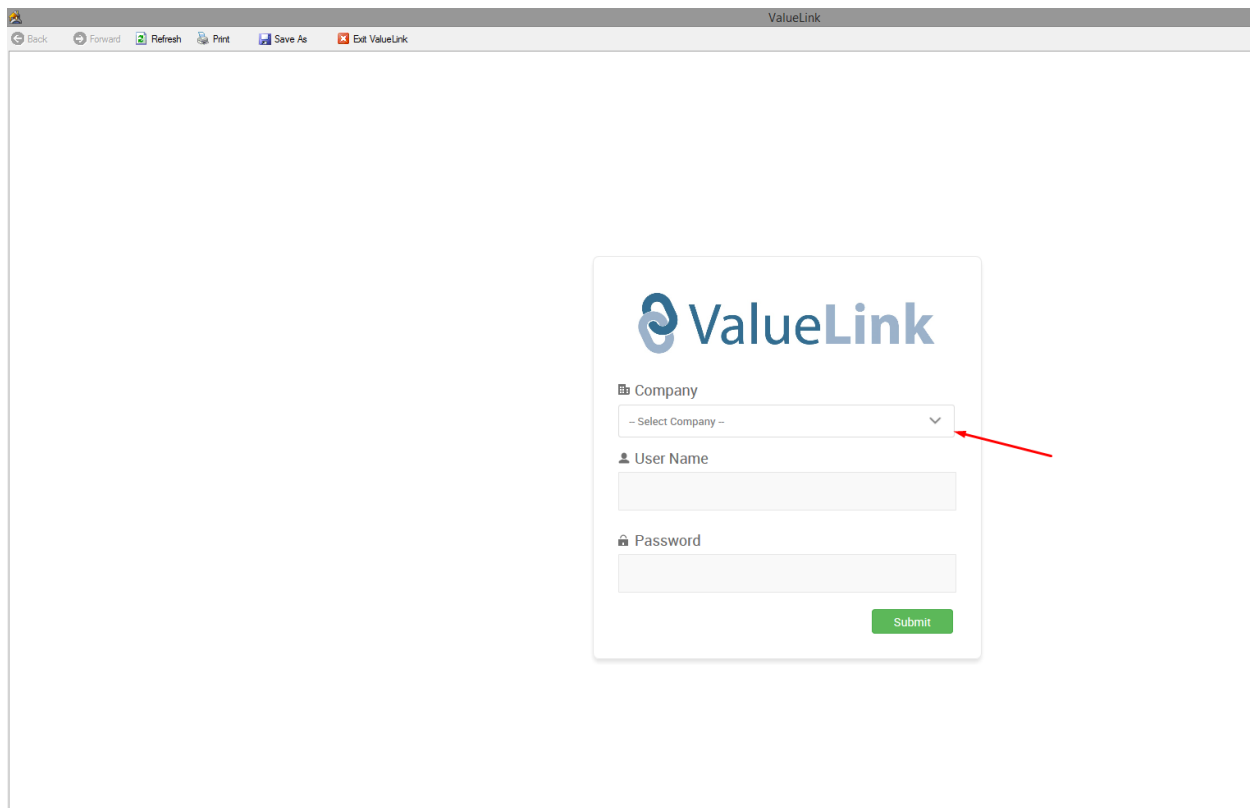
Step 2: After clicking “Appraisals” you will see the following window with the list of available Vendor interfaces. Select “ValueLink Software” and click “OK”.



Step 3: The next screen shows the area which will show the documents received from ValueLink when the order is completed. Click "Launch ValueLink" to launch the ValueLink system within Calyx.



Step 4: After ValueLink is launched, you will be taken to the Login screen. Please select your company from the list of Lenders. Thereafter, enter your ValueLink username & password that has been provided to you by your Appraisal Vendor.



# Creating a New Appraisal

Step1: Click on “Create New Order” Button or “Click Here” to place order from the current loan file.

The screenshot displays the ValueLink web application interface. At the top, there is a navigation bar with the ValueLink logo, a 'Home' link, a search bar, and a settings icon. Below the navigation bar, a green button labeled 'Create New Order' is visible. A blue arrow points from the text 'CLICK HERE TO PLACE ORDER FOR THE CURRENT LOAN FILE' to the 'Create New Order' button. Another blue arrow points from the text 'Click Here to add new order.' to a link within a yellow message box that states 'No appraisal orders exist for this loan. Click Here to add new order.'

**APPRaisal ORDERS FOR THIS LOAN**

No appraisal orders exist for this loan. [Click Here](#) to add new order.

ACTIVE ORDERS	
All Active Orders	84
Rush Orders	0
Orders Past Due	36
Orders Due Today	0
Inspection Scheduled	1
Orders on HOLD	1


OTHER ORDERS	
All Completed	112
Completed But Not Downloaded	0
Archived	1
Cancelled Orders	6

ALL ACTIVE ORDERS ( 84 )					
Order Details	People	Dates	Item(s)	Status	
R15-00029 1222 Test Lane Houston TX 77006 Type: Residential Appraisal Loan #: 12333655 Borrower(s): Rick McArdle	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 3/30/2015 Due: N/A Assigned: 3/30/2015 Insp.: 4/1/2015 (10:00:00 AM) Completed: 3/30/2015	1004 Single Family URAR - Investment	File In Review	
R15-00030 112334 Test Lane Houston TX 77006 Type: Residential Appraisal Loan #: 11233444 Borrower(s): John @ Oriental Bank	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two Addl. Proc.: ABC User 3	Ordered: 3/31/2015 Due: 3/31/2015 Assigned: 3/31/2015 Insp.: 4/1/2015 (8:30:00 AM) Completed: N/A	1004 Single Family URAR - Investment	Revision Requested	
R15-00031 123 Any Street Santa Clara CA 95050 Type: Residential Appraisal Loan #: 1503EM000001 Borrower(s): FHA Fixed Example & FHA Fixed2 Example	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 4/1/2015 Due: 4/6/2015 Assigned: N/A Insp.: N/A Completed: N/A	1004 Single Family URAR - Investment	Unassigned	
R15-00039 1234 Freedom Lane Houston TX 77006 Type: Residential Appraisal Loan #: NA Borrower(s): David @ Lenders Aid	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 5/7/2015 Due: N/A Assigned: 5/7/2015 Insp.: N/A Completed: N/A	1004 Single Family URAR - Investment	In Progress	

Step 2: Once you have clicked on the new order button, the order form will be pre-filled with the relevant information from the loan file. Please review it and make amendments as needed.

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 Home Search

### NEW ORDER REQUEST

#### Order Details

Client (required)  
GMM - San Diego


Branch  
Select One

Investor Name  
[Text Field]

Transaction Type (required)  
Purchase


Loan Number (required)  
VL-12345

FHA/USDA Case Number  
123-1234567

Is Lender Different? 

Loan Type  
FHA

Loan Application Date  
[Text Field]

Priority  
Normal 

#### Borrower Information

Borrower (and Co-Borrower)  
John Smith

Borrower Email  
johnsmith@vsoftware.com

Borrower Work Phone  
111-222-3333

Borrower Phone  
111-222-3333

Borrower Cell Phone  
111-222-3333


#### Property Details


Property Type (required)  
Condominium


Step 3: Click on the “Continue” button after reviewing the order details

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Order Processor  
ABC Mortgage User One 

Loan Processor  
-- Select One -- 

Addl. Processor/Assistant  
-- Select One -- 

Additional Client Email(s)  
[Text Field]

Orderer's Name  
[Text Field]

Addl. Processor/Assistant  
-- Select One -- 

#### Broker Information

Broker Name  
[Text Field]


Broker Phone  
[Text Field]

Broker Cell Phone  
[Text Field]

Broker Email  
[Text Field]

Broker Work Phone  
[Text Field]


#### Other Details

☐ Was an appraisal previously ordered for this property with us? 

Tracking Number  
[Text Field]

Vendor File Number  
[Text Field]

Comments  
[Text Area]

Do you wish to provide supporting documents for this order? 

☐ Yes ☒ No

[Continue](#) [Cancel](#)

Step 3: Enter payment details as per the requirement of the lender.

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Loan Amount	50000.00	Disclosure Date	N/A
Appraised Value	N/A	Sales Price	N/A

Dates	
Date Appraisal Needed	9/20/2017
Estimated Delivery Date	9/20/2017

Client Details	
Ordered By Name	ABC Mortgage User One
Ordered By Phone	N/A
Loan Processor	N/A
Addl. Processor/Assistant	N/A
Addl. Processor/Assistant	N/A
Additional Client Email(s)	N/A

Broker Information	
Broker Name	N/A
Broker Email	N/A
Broker Phone	N/A
Broker Work Phone	N/A
Broker Cell Phone	N/A

Other Details	
Appraisal Previously Ordered	False
Tracking Number	N/A
Vendor File Number	N/A
Comments	N/A

Payment Information	
Choose your payment method	
<input type="radio"/> Invoice <input checked="" type="radio"/> Credit Card	
Payment Options	
<input checked="" type="radio"/> I will upload a payment authorization form	
<input type="radio"/> I would like to provide a credit card now	
<input type="radio"/> Contact borrower to collect a credit card payment	

Go Back Confirm and Create Order

Step 4: Finally, click the “Confirm & Create Order” to place the order in ValueLink system.



# Checking Appraisal Status

All orders placed for a particular loan file can be seen at the top of the screen after the ValueLink interface has been launched from Calyx.

To check appraisal order status, please refer to the last column of this section.

<Company Site>

BackForwardRefreshPrintSave AsExit <Company Site>

ValueLink

HomeSearch

?

⚙

Create New Order

APPRAISAL ORDERS FOR THIS LOAN ( 1 )

Order Details	People	Dates	Item(s)	Status
CSS-0000052 5076 Mountain View Blossom Valley CA 94040 Type: Residential Appraisal Loan #: VL-12345 Borrower(s): John Smith	Ordered By: ABC Mortgage User One	Ordered: 2/28/2017 Due: 9/20/2017 Assigned: N/A Insp: N/A Completed: N/A	Value Update-1004D	Unassigned

ACTIVE ORDERS

All Active Orders	85
Rush Orders	0
Orders Past Due	36
Orders Due Today	0
Inspection Scheduled	1
Orders on HOLD	1

OTHER ORDERS

All Completed	112
Completed But Not Downloaded	0
Archived	1
Cancelled Orders	6

ALL ACTIVE ORDERS ( 85 )

Order Details	People	Dates	Item(s)	Status
R15-00029 1222 Test Lane Houston TX 77006 Type: Residential Appraisal Loan #: 12333655 Borrower(s): Rick McArdle	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 3/30/2015 Due: N/A Assigned: 3/30/2015 Insp: 4/1/2015 (10:00:00 AM) Completed: 3/30/2015	1004 Single Family URAR - Investment	File In Review
R15-00030 112334 Test Lane Houston TX 77006 Type: Residential Appraisal Loan #: 11233444 Borrower(s): John @ Oriental Bank	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two Addl. Proc.: ABC User 3	Ordered: 3/31/2015 Due: 3/31/2015 Assigned: 3/31/2015 Insp: 4/1/2015 (8:30:00 AM) Completed: N/A	1004 Single Family URAR - Investment	Revision Requested
R15-00031 123 Any Street Santa Clara CA 95050 Type: Residential Appraisal Loan #: 1503JEM000001 Borrower(s): FHA Fixed Example & FHA Fixed2 Example	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 4/1/2015 Due: 4/6/2015 Assigned: N/A Insp: N/A Completed: N/A	1004 Single Family URAR - Investment	Unassigned
R15-00039 1234 Freedom Lane Houston TX 77006 Type: Residential Appraisal Loan #: NA Borrower(s): David @ Lenders Aid	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User Two	Ordered: 5/7/2015 Due: N/A Assigned: 5/7/2015 Insp: N/A Completed: N/A	1004 Single Family URAR - Investment	In Progress
R15-00047 123 Any Street Santa Clara CA 95050 Type: Residential Appraisal Loan #: 1503JEM000001 Borrower(s): FHA Fixed Example & FHA Fixed2 Example	Ordered By: ABC Mortgage User One Processor: ABC Mortgage User One	Ordered: 6/5/2015 Due: N/A Assigned: N/A Insp: N/A Completed: N/A	Desk Review	Unassigned

# Posting Comments

Step 1: To post a comment for an order, please click on the “Add Comment” button once the order has been opened from the ValueLink dashboard.


The screenshot shows a web browser window with the ValueLink dashboard. The browser's address bar shows '< Company Site>'. The dashboard has a navigation bar with the following links: **Jump to:** Order Details, Borrower, Property, Appraisal, Reports, Documents, Comments. The main content area is divided into several sections:

- Broker Information:** A table with fields for Broker Name, Broker Email, Broker Work Phone, Broker Phone, and Broker Cell Phone, all showing 'N/A'.
- Additional Order Details:** A table with fields for Account Representative 1, 2, and 3 (all 'N/A'), Order Complete? (False), Report Sent to Borrower? (N/A), Downloaded By Borrower? (N/A), Assigned On, Completion Date, Sent to Borrower On, and Downloaded By Borrower On (all 'N/A').
- Client Engagement Instructions:** A text box containing 'These are test instructions for Test Client'.
- Reports(s):** A table with columns for Report Type, File Name, and Submitted On. It lists 'Value Update-1004D' and 'UAD XML Report', both with 'N/A' for File Name and empty Submitted On dates.
- Other Supporting Documents:** A section with a '+ Add Document' button and a message: 'No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order'.
- Comments:** A section with a '+ Add Comment' button (highlighted by a blue arrow) and a message: 'No comments currently exist for this appraisal. Click Add Comment below to add a comment'.

Step 2: Please enter the comment in the comment box and click “Add Comment” to add the comment to the order.

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 Home Search ? ⚙

### ADD COMMENT

Order Details	
Appraisal Number	CSS-0000052
Property Address	5076 Mountain View Blossom Valley CA 94040
Borrower Name	John Smith
Loan Number	VL-12345

Comment Details	
Comment	<div>Your comment here ..</div>
<div>Add Comment Cancel</div>	

# Adding Documents to an existing order

Step 1: To add a document to an order, please click on the “Add Document” button once the order has been opened from the ValueLink dashboard.

The screenshot shows a web browser window with the ValueLink dashboard. The browser's address bar shows '<Company Site>' and the navigation bar includes 'Jump to: Order Details Borrower Property Appraisal Reports Documents Comments'. The 'Documents' tab is selected. The dashboard is divided into several sections: 'Broker Information' (with fields for Broker Name, Email, Phone, and Work Phone), 'Additional Order Details' (with fields for Account Representatives, Order Complete, Report Sent, and Downloaded By Borrower), 'Client Engagement Instructions' (with a text area for instructions), 'Reports(s)' (with a table for Report Type, File Name, and Submitted On), and 'Other Supporting Documents' (with a '+ Add Document' button). A blue arrow points to the '+ Add Document' button. Below the 'Other Supporting Documents' section is a yellow box with the text: 'No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order'. At the bottom is a 'Comments' section with a '+ Add Comment' button and a yellow box with the text: 'No comments currently exist for this appraisal. Click Add Comment below to add a comment'.

Broker Information			
Broker Name	N/A		
Broker Email	N/A	Broker Phone	N/A
Broker Work Phone	N/A	Broker Cell Phone	N/A

Additional Order Details			
Account Representative 1	N/A	Assigned On	N/A
Account Representative 2	N/A	Assigned On	N/A
Account Representative 3	N/A	Assigned On	N/A
Order Complete?	False	Completion Date	N/A
Report Sent to Borrower?	N/A	Sent to Borrower On	N/A
Downloaded By Borrower?	N/A	Downloaded By Borrower On	N/A

Client Engagement Instructions

These are test instructions for Test Client

Reports(s)		
Report Type	File Name	Submitted On
Value Update-1004D	N/A	
UAD XML Report	N/A	

Other Supporting Documents

+ Add Document

No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order

Comments


+ Add Comment

No comments currently exist for this appraisal. Click Add Comment below to add a comment

Step 2: Select the Document type for the document & click “Browse” to locate the document from disk. Finally, click on “Submit Document” button to add the document to the order.

< Company Site>

Back Forward Refresh Print Save As Exit <Company Site>

 Home Search ? - ⚙

### ADD SUPPORTING DOCUMENT

Order Details	
Appraisal Number	CSS-0000052
Property Address	5076 Mountain View Blossom Valley CA 94040
Borrower Name	John Smith
Loan Number	VL-12345

Select one or more documents below

NOTE: Please DO NOT share rebuttal requests/value reconsideration requests/ revision requests directly with the appraiser

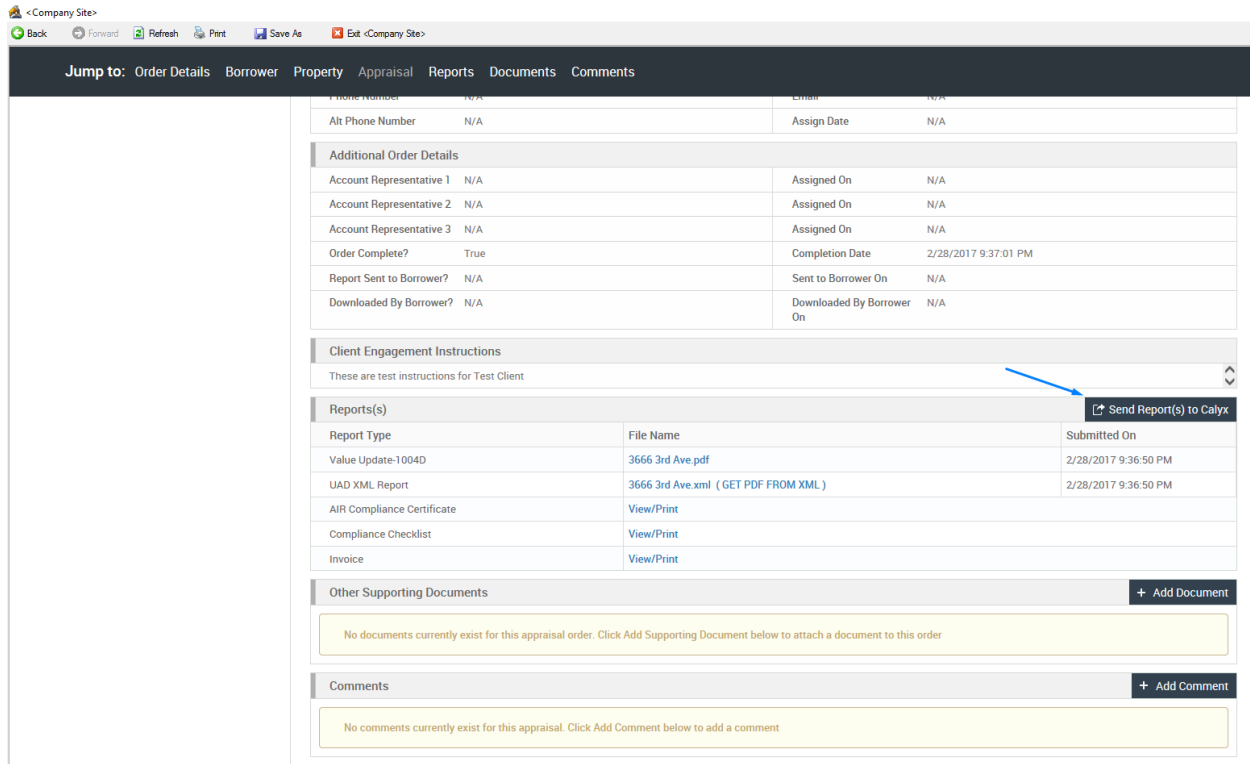
Document Type	Upload Document
<div>Sales Contract</div>	<div></div> <div>Browse...</div>
<div>Select One</div>	<div></div> <div>Browse...</div>
<div>Select One</div>	<div></div> <div>Browse...</div>
<div>Select One</div>	<div></div> <div>Browse...</div>

Submit Document

Cancel

# Getting the Completed Appraisal Report(s)

Step 1: Once the appraisal reports & its supporting documents are available in ValueLink, Click on the “Send Report(s) to Calyx”.



The screenshot shows the ValueLink interface with the 'Reports' tab selected. The interface includes a navigation bar at the top with options: Jump to: Order Details, Borrower, Property, Appraisal, Reports, Documents, Comments. The main content area is divided into several sections:

- Additional Order Details:** A table with fields like Phone Number, Alt Phone Number, Email, Assign Date, Account Representative 1, Account Representative 2, Account Representative 3, Order Complete?, Report Sent to Borrower?, and Downloaded By Borrower?.
- Client Engagement Instructions:** A section with a dropdown menu and a blue arrow pointing to the 'Send Report(s) to Calyx' button.
- Reports(s):** A table with columns for Report Type, File Name, and Submitted On. It lists reports such as Value Update-1004D, UAD XML Report, AIR Compliance Certificate, Compliance Checklist, and Invoice.
- Other Supporting Documents:** A section with a '+ Add Document' button and a message: 'No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order'.
- Comments:** A section with a '+ Add Comment' button and a message: 'No comments currently exist for this appraisal. Click Add Comment below to add a comment'.

Step 2: Select the files to be sent to Calyx and click on the “Send Report(s)” button.

Jump to: Order DetailsBorrowerPropertyAppraisalReportsDocumentsComments

Additional Order Details

Account Representative 1	N/A	Assigned On	N/A
Account Representative 2	N/A	Assigned On	N/A
Account Representative 3	N/A	Assigned On	N/A
Order Complete?	True	Completion Date	2/28/2017 9:37:01 PM
Report Sent to Borrower?	N/A	Sent to Borrower On	N/A
Downloaded By Borrower?	N/A	Downloaded By Borrower On	N/A

Client Engagement Instructions

These are test instructions for

SEND REPORT(S) TO CALYX

Reports(s)	<input checked="" type="checkbox"/>	Name	Type	Document Status
Report Type	<input checked="" type="checkbox"/>	3666 3rd Ave.pdf	Appraisal Report	<input type="text"/>
Value Update-1004D	<input checked="" type="checkbox"/>	Invoice_CSS_0000052.pdf	Invoice	<input type="text"/>
UAD XML Report	<input checked="" type="checkbox"/>	ComplianceCertificate_CSS0000052.pdf	Compliance Certificate	<input type="text"/>
AIR Compliance Certificate	<input checked="" type="checkbox"/>			
Compliance Checklist				
Invoice				

Send Report(s)

Cancel

Other Supporting Documents

No documents currently exist for this appraisal order. Click Add Supporting Document below to attach a document to this order

+ Add Document

Comments

+ Add Comment

Comment

The lender has requested a revision for the report due to the following reason:

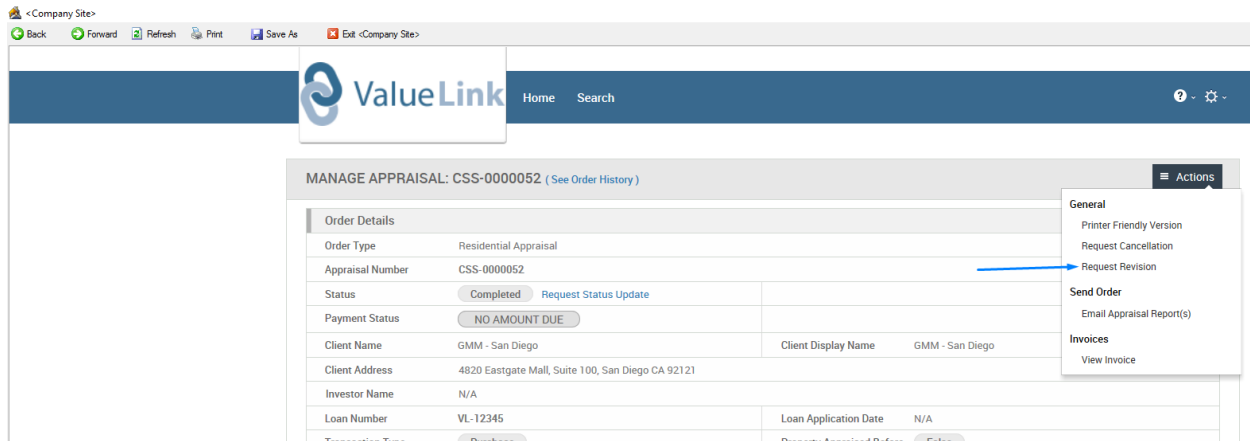
Test

Posted By ABC Mortgage User One on 3/1/2017 11:24:29 AM

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# Requesting a Revision

Step 1: Click on the Actions button on the order & click “Request Revision” button.



Step 2: Enter the details for the revision being requested.


Step 3: The “Add Document” section allows any supporting documents to be attached along with the revision request.

Step 4: Click on the “Submit” button to send the revision request.



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Back Forward Refresh Print Save As Exit <Company Site>

 ValueLink Home Search ? ⚙

### NEW REVISION REQUEST

Order Details	
Appraisal Number	CSS-0000052
Property Address	5076 Mountain View Blossom Valley CA 94040
Borrower Name	John Smith
Client Name	GMM - San Diego

Reports	
Value Update-1004D	<a href="#">3666 3rd Ave.pdf</a> (2/28/2017 9:36:50 PM)
UAD XML Report	<a href="#">3666 3rd Ave.xml</a> (2/28/2017 9:36:50 PM)

Revision Reason

Reason

Add Document

Document Type	Upload Document
Select One	<input type="text"/> Browse...

Submit Cancel