

On this page where we edit the order, I don’t see anywhere where the order can be cancelled? What if they don’t want or need the order anymore? What then? Does it just remain in the cue permanently taking up space?

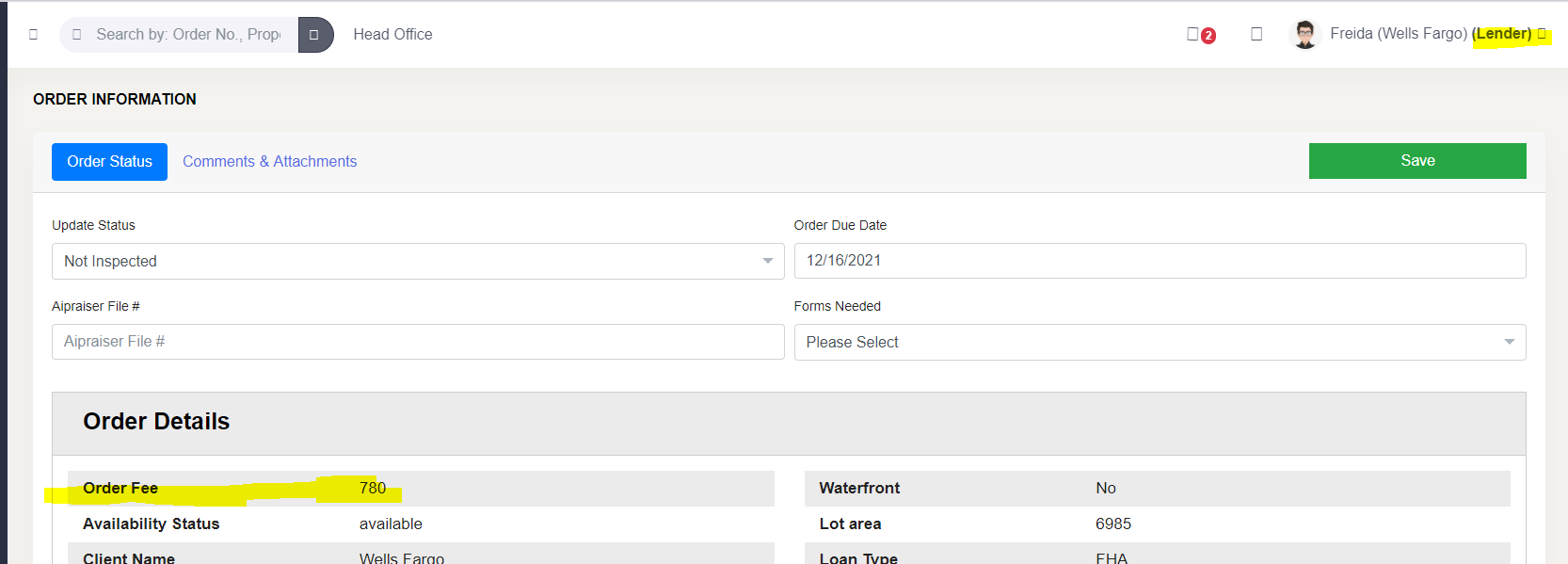
Order Create by Lender => AMC => Appraiser

1. Appraiser cancelled => notify to AMC
2. AMC cancelled => Notify to Lender
3. Lender Cancelled => Notify to AMC and Appraiser

Order Create by AMC => appraiser

1. Appraiser cancelled => notify to AMC
2. AMC Cancelled => notify to Appraiser

Note: All scenarios will be covered like direct client assigns to appraiser.



Since this is a lender, I realized that there needs to be another fee field. Lenders have a fee which they want to pay and then a fee they’ll actually pay. Lenders should be able to have 2 fees, one requested fee, another would be the maximum fee allowed to auto assign, otherwise if a quoted fee from an AMC or appraiser is higher than either fee, they would have to approve the higher fee and not allow auto assign. The fee that they request should be the one shown to AMC’s and appraisers.

The higher fee would be shown to AMC’s so the AMC can sort and assign the appraisal to the appraiser, but if a fee is on the higher side and still within the highest allowed fee, it could be auto assigned without having to approve the fee with the lender. If there is no higher amount, then all quotes would have to be reviewed and approved by the AMC for the lender. Appraisers would not be able to see the higher fee if it were to be directly solicited to an appraiser.

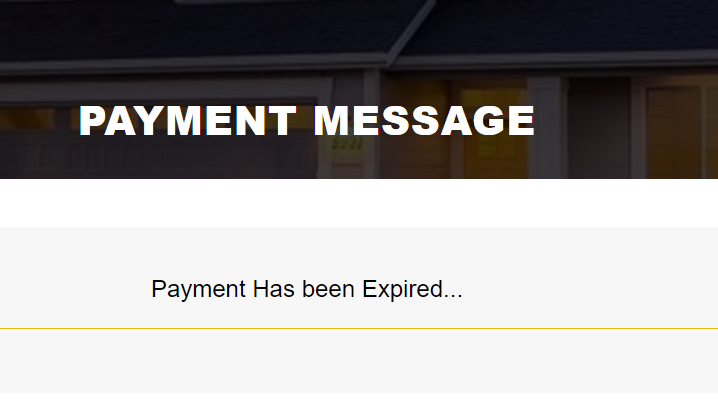
In some cases, appraisers will give a quote to the bank and the bank may choose the appraiser. In most cases the appraiser is auto assigned the appraisal with a standard fee. If the property is more difficult, high value, multiple buildings, distant, whatever the appraiser can request a fee increase with explanation of why the fee will be higher.

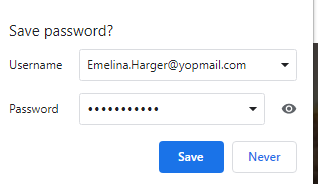
So, in short the banks should have 2 fee fields, one requested fee, the other Maximum Fee. Both do not necessarily need to be filled out.

The AMCs would see both fees so they know when soliciting to appraisers, whether it can be directly assigned without getting approval from the bank.

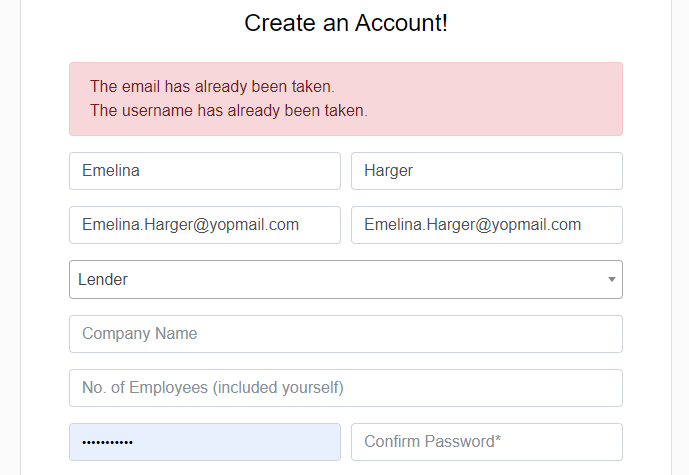
The appraisers WOULD NOT see the Maximum fee from the bank, otherwise the appraisers would just choose that amount.

1. One field “Maximum Fee” will be added while creating order.
2. The Appraisers would not see this field.
3. If appraiser requests the more fee than this field “Maximum Fee”, than explanation field will be opened for explaining why this higher fee is required
4. If appraiser request more fee than standard fee but less than maximum fee than order will be automatically assigned.

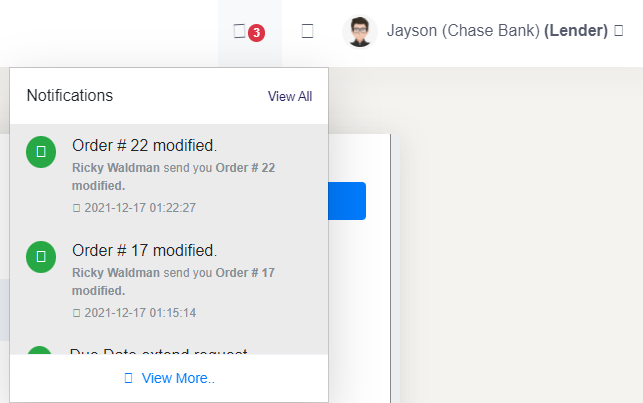


I get this message when trying to log in 

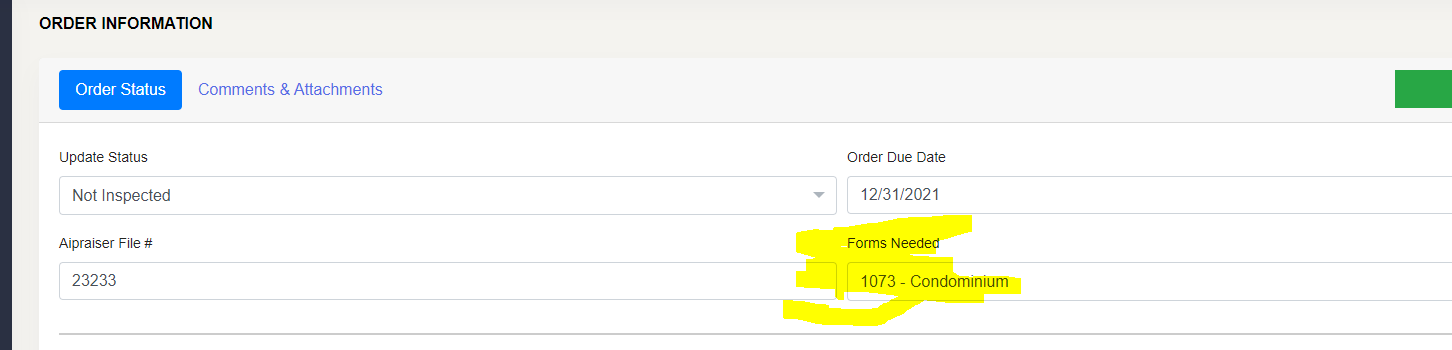
User already exists and cannot be logged into.



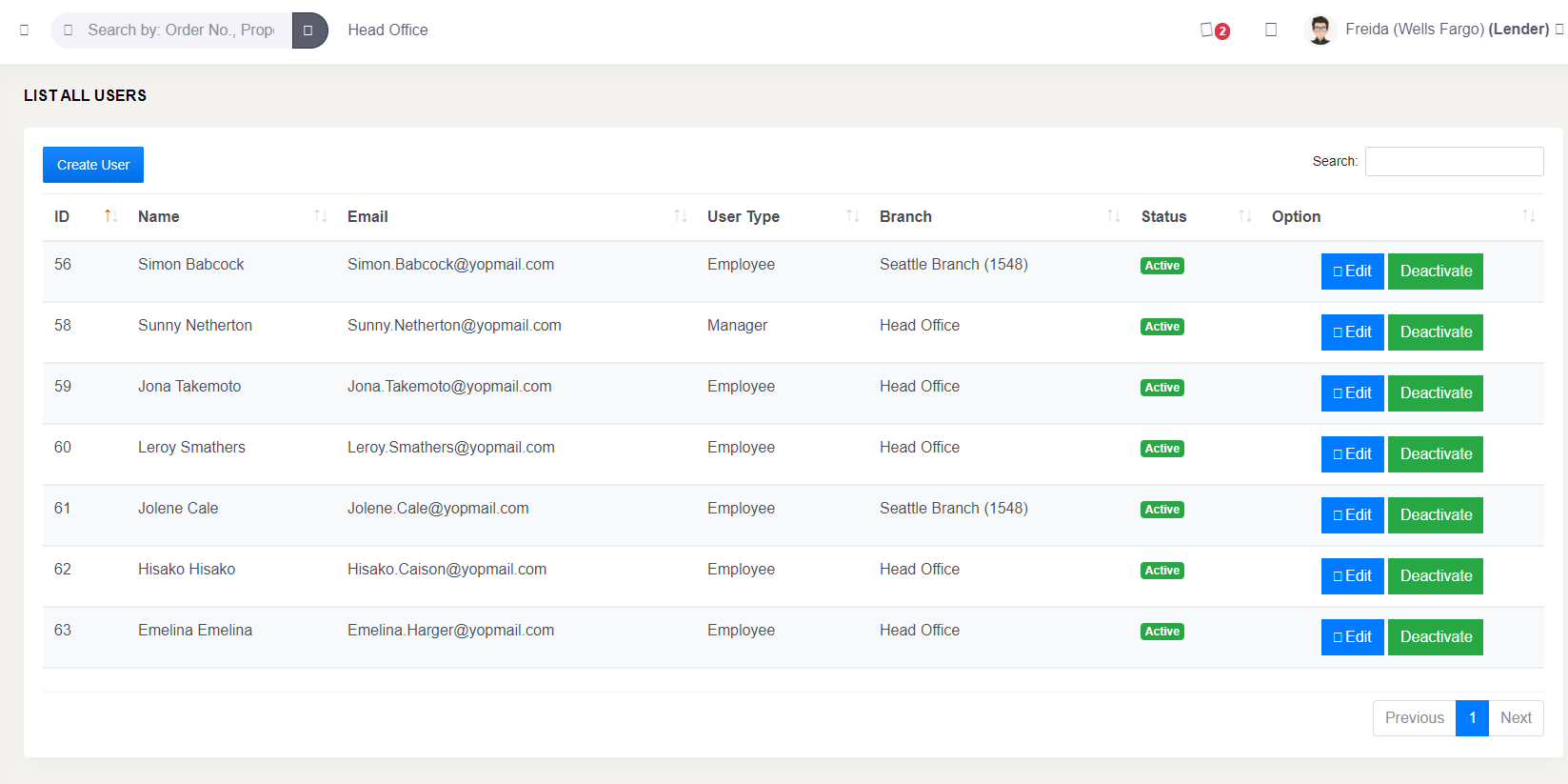
So now I can’t test with some of the users?



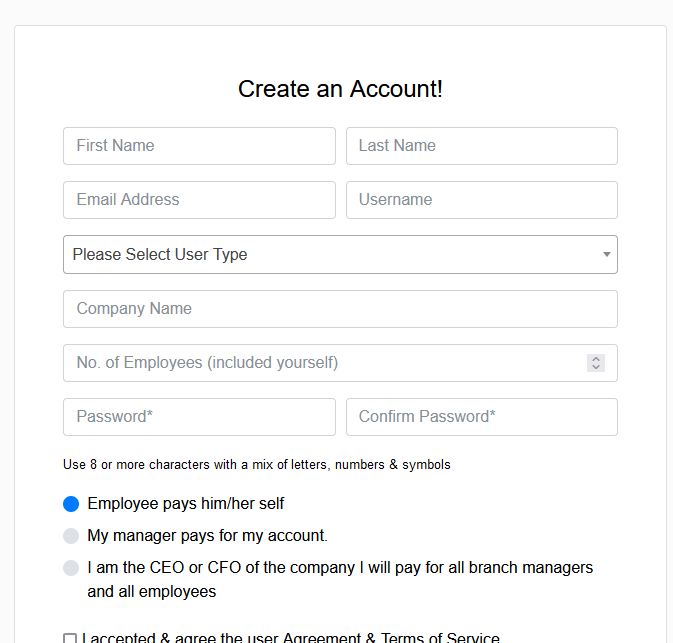
For notifications, can we use the address or borrower name. Just an order number does not explain what was modified? Most banks order numbers or file numbers are 9-12 numbers long. A borrower name would be much more descriptive than a file number.

 Here where it says forms needed, it appears that only one form at a time can be selected. Need to have multiple selected forms. One main form and other supporting forms. So, if a condo was selected, and it is a rental property and the client wants the invoice attached along with E&O then all these forms would need to be selected. The 1073, the 216 and 1007 because it is a rental, maybe the client wants the USPAP definitions too. Right now, there is only one form that is allowed in the field. There has got to be a way to select multiple forms for this field. Once a main form is selected, no more main forms should be added. If there are supplementary forms needed, they should all be able to be selected if they so choose. Otherwise, we’ll have to change the field name to just FORM NEEDED. That would be far too easy. I want to make it right, even though the right way is more difficult.

When signing up, there still does not appear to be an option to join an office with managers and other users already there.

sure, within an office that has already been created a manager could add users, but another option should be available. Send an invitation for user to join office or company from this page.

So, the manager could type in an email address, indicate whether or not they would be a manager or employee. The employee or other manager would then accept the invitation, it would then allow the user to enter all their information other than their status as employee or manager.

From the sign up page, there is still no option to sign up with a company or office. 

I thought I mentioned that this would be a requirement for the site. People should be able to sign up themselves and by pass the manager signing them up. Once they do sign up, their account would be limited to an employee with basic rights. Once they are in the system, the manager then could change this new user to a manager with full rights or keep them as an employee with some more rights other than the basic ones.

Really don’t think we need the no of employees field a company will have as many as they have. Why would someone signing up as an employee know that number? Many managers don’t even know that number if the company is large enough.

I think we could change this to sign up as new company or sign up under existing company. If they sign up as an existing company, they would need to know the branch number so they could sign up under that branch, not some random branch that is in another state in the case of larger companies like Chase or Wells Fargo.