

Bluebird Valuation – Ordering From Encompass

Encompass users can now order appraisals with **Collateral Management DBA Bluebird Valuation**. The process is seamless and the orders can be placed and tracked from start to finish without leaving Encompass 360.

Placing A New Order

To place an order with Collateral Management, follow the steps below:

- 1) Log on to Encompass
- 2) Open up the loan for which they wish to order the appraisal.
- 3) Go to the **Services** tab and click on **Order Appraisal**
- 4) On the next screen (shown below), choose **Collateral Management - ValueLink** from the list of appraisers.

*NOTE: If you do not see us as an option, you will have to ask the Encompass Administrator at your company to add **Collateral Management - ValueLink** as an approved vendor for your company*

Order Appraisal

My Appraisers | All Appraisers

Search All Appraisers By

Zip Code: 90028 Location: CA Los Angeles

Lender: All Lenders

Appraisal Type: Full Residential Appraisals with Interior Inspections

Matching Appraisers (175) Add to My Appraisers

Company Name ▲	Price	Turn Time	Profile
ClearValue Consulting Inc.	Per contract	Per contract	More Info
ClearView Valuation Services,...	Per contract	Per contract	More Info
Coast to Coast Appraisal Servi...	Per contract	Per contract	More Info
Coester VMS	Per contract	Per contract	More Info
CoesterVMS Direct	Per contract	Per contract	More Info
Collateral Management - Value...	Per contract	Per contract	More Info
Collateral Management System	Per contract	Per contract	More Info
Connexions	Per contract	Per contract	More Info
Consolidated - New Orders	Per contract	Per contract	More Info
Core Valuation Management - ...	Per contract	Per contract	More Info

Collateral Management - ValueLink

Next

- 5) The window below will open. Enter your **Collateral Management** username and password to log on.
Check the **Remember Me** box to save your credentials:



 User Name

 Password

[Forgot Your Password](#)

6) After logging in, the following window will open. Fill out the form below to provide order details.

Order Detail - Collateral Management LLC



Loan Information

Borrower Shawna Test

Co-Borrower John Test

Property Address 1234 W Bent Tree Dr Los Angeles CA 90028

Loan Number 1606000054

Loan Amount 750000.00

FHA Case Number N/A

Order | Contacts | Payment | Check Status

Products

Item 1 Select One

Item 2 Select One

Item 3 Select One

Item 4 Select One

Order Detail

Loan Purpose Select One

Loan Type Conventional

Occupancy Select One

Property Type Detached

Due Date 7/31/2016

Users

Ordered By Test Client

Processor 1 Select One

Processor 2 Select One

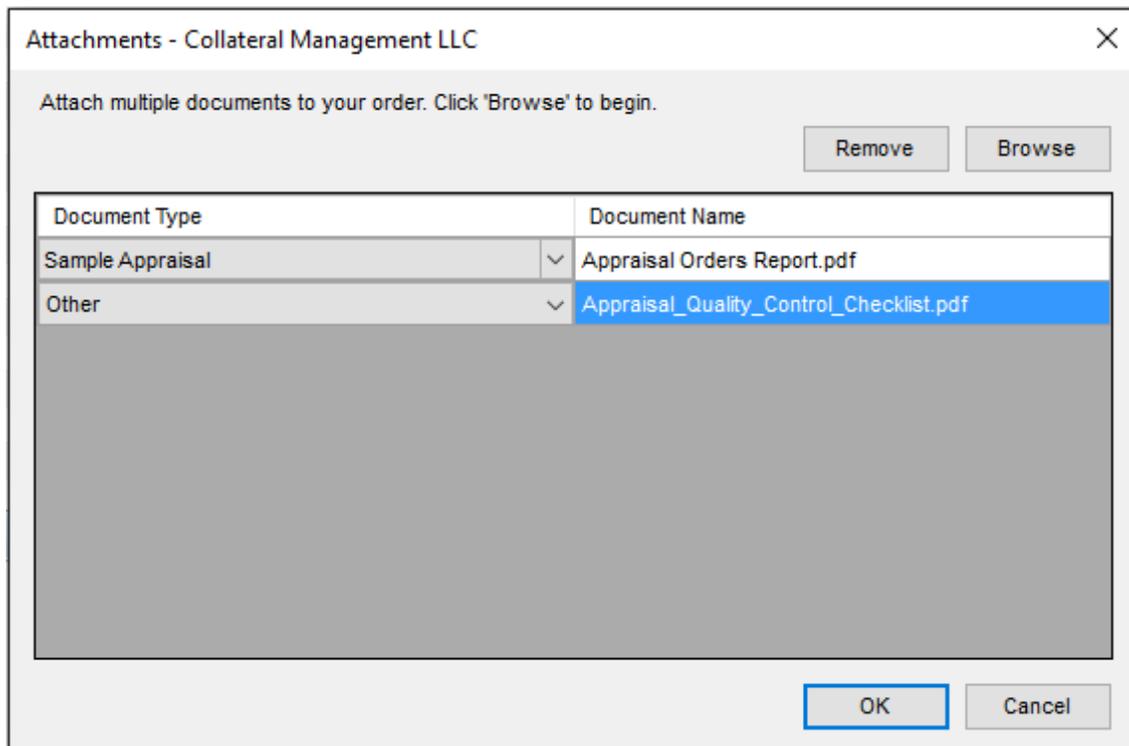
Processor 3 Select One

Attachments (0)

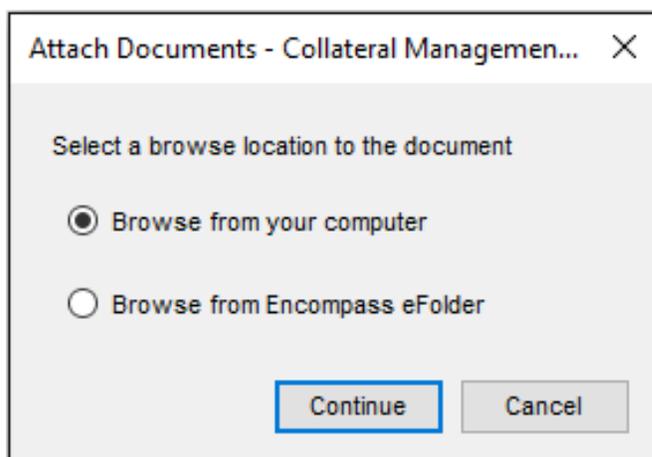
Order Comments

Order Appraisal Close

- 7) Click on the **Attachments** button to attach documents to the new order. Attach as many documents as needed.



Click on the **Browse** button and choose whether to upload documents from your computer or your Encompass eFolder



8) Click on the **Contacts** tab and provide the borrower's details and the property access information:

Order Detail - Collateral Management LLC



Loan Information

Borrower	Shawna Test
Co-Borrower	John Test
Property Address	1234 W Bent Tree Dr Los Angeles CA 90028
Loan Number	1606000054
Loan Amount	750000.00
FHA Case Number	N/A

Order **Contacts** Payment Check Status

For entry into property, contact

Borrower	Co-Borrower
First Name <input type="text" value="Shawna"/>	First Name <input type="text" value="John"/>
Last Name <input type="text" value="Test"/>	Last Name <input type="text" value="Test"/>
Home Phone <input type="text" value="913-111-1112"/>	Home Phone <input type="text" value="913-111-1112"/>
Work Phone <input type="text" value="913-111-1111"/>	Work Phone <input type="text" value="913-555-1212"/>
Cell Phone <input type="text" value="913-111-1111"/>	Cell Phone <input type="text" value="913-111-1112"/>
Email <input type="text" value="shawna@js-adams.com"/>	Email <input type="text" value="john@js-adams.com"/>

Agent	Access Notes
First Name <input type="text"/>	<div style="border: 1px solid #ccc; height: 150px; vertical-align: top;"></div>
Last Name <input type="text"/>	
Home Phone <input type="text"/>	
Work Phone <input type="text"/>	
Cell Phone <input type="text"/>	
Email <input type="text"/>	

- 9) **OPTIONAL:** Click the **Payment** tab to provide payment details for the order. You can select the Payment type as **Invoice** or **Credit Card**. When selecting credit card you can enter credit card details by selecting **Provide Credit Card Now** in the payment options dropdown.

Order Detail - Collateral Management LLC



Loan Information

Borrower	Shawna Test
Co-Borrower	John Test
Property Address	1234 W Bent Tree Dr Los Angeles CA 90028
Loan Number	1610000079
FHA Case Number	N/A

Order Contacts **Payment** Check Status

Payment For: New Order Order #:

Payment Type: Credit Card

Payment Options: **Provide Credit Card Now** (selected)

- Select One
- Provide Credit Card Now**
- Payment Auth. Form Provided
- Send Payment Link to Borrower

Credit Card Information

Card Holder First Name:

Card Holder Last Name:

Credit Card Number:

Expiration (MM/YYYY): 1 / 2018

Billing Address:

City: State: Select One Zip:

By submitting this card, you acknowledge that you are authorized to use this card on the card holder's behalf. You also acknowledge that the Borrower has indicated their intent to proceed with this loan.

Update Payment Information

Order Appraisal Close

You can also select the option to **Send Payment Link to Borrower**. This will send out an email to the borrower with a secure link to make the payment for the order.

Order Detail - Collateral Management LLC



Loan Information	
Borrower	Shawna Test
Co-Borrower	John Test
Property Address	1234 W Bent Tree Dr Los Angeles CA 90028
Loan Number	1610000079
FHA Case Number	N/A

Order Contacts **Payment** Check Status

Payment For: Order #:

Payment Type:

Payment Options:

- Select One
- Provide Credit Card Now
- Payment Auth. Form Provided
- Send Payment Link to Borrower**

Credit Card Information

Card Holder First Name:

Card Holder Last Name:

Credit Card Number:

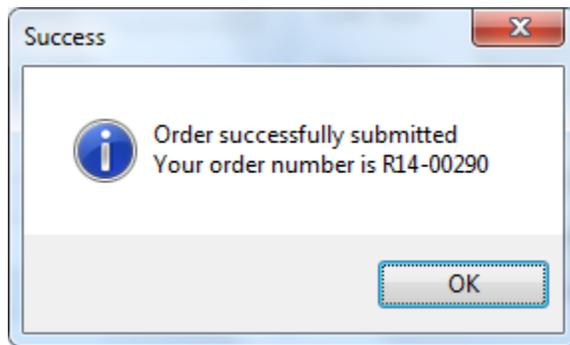
Expiration (MM/YYYY): /

Billing Address:

City: State: Zip:

By submitting this card, you acknowledge that you are authorized to use this card on the card holder's behalf. You also acknowledge that the Borrower has indicated their intent to proceed with this loan.

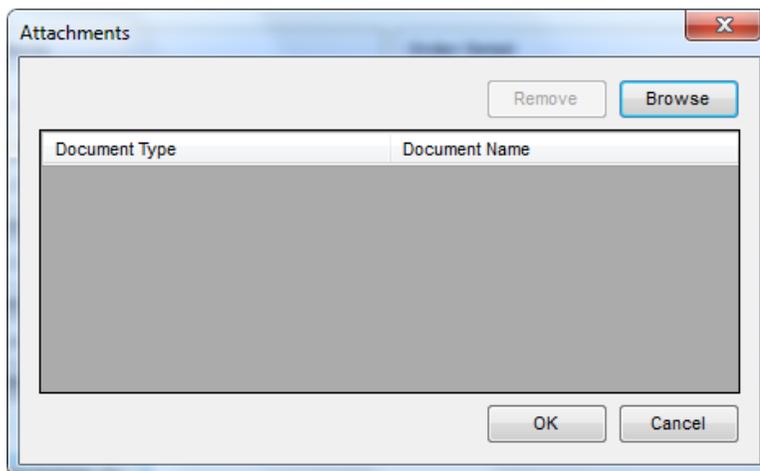
10) Click on the **Order Appraisal** Button to place the order. A confirmation message is returned when an order has been submitted successfully.



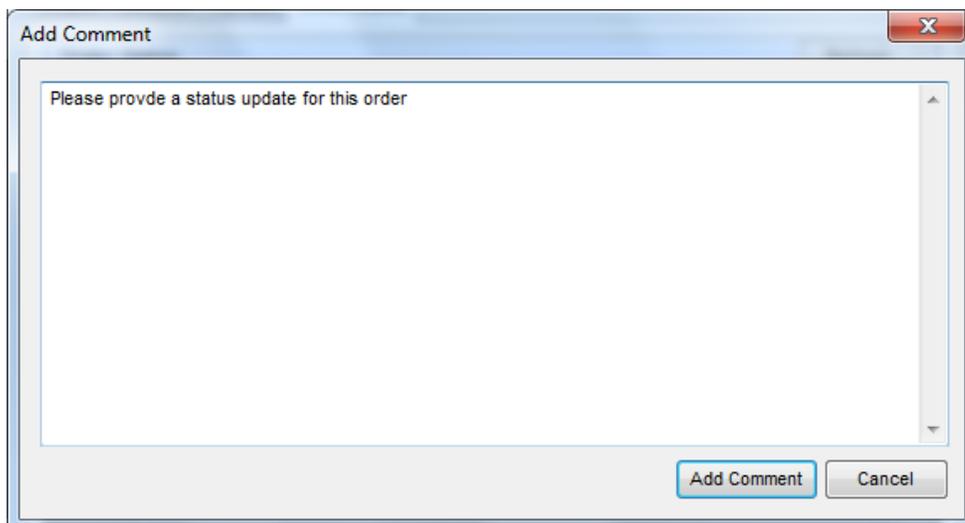
Status Updates and Ongoing Communication

Check the status of all orders placed for a loan, follow the instructions below:

1. Log on to Encompass
2. Open up the loan for which they wish to order the appraisal.
3. Go to the Services tab and click on Order Appraisal
4. On the next screen, choose **Collateral Management** from the list of appraisers.
5. Enter your **Collateral Management** username and password to log on. Check the **Remember Me** box to save your credentials:
6. On the next screen, click the **Check Status** tab. Click on the order to see all attached documents for the order and comments posted for the order. Double click a document to open it.
7. Add documents for an order at any time.



11) Add Comments to an order to send messages to the AMC.



- 12) **OPTIONAL:** Provide an updated payment method for the order if needed. Go to the Payment Tab and select Existing Order. Select the order number in the Order # field and enter your payment information. Click the **Update Payment Information** button to update the payment method.

Order Detail - Collateral Management LLC



Loan Information

Borrower	Shawna Test
Co-Borrower	John Test
Property Address	1234 W Bent Tree Dr Los Angeles CA 90028
Loan Number	1610000079
FHA Case Number	N/A

Order Contacts **Payment** Check Status

Payment For: Existing Order Order #: Select One

Payment Type: Credit Card

Payment Options: Send Payment Link to Borrower

Credit Card Information

Card Holder First Name:

Card Holder Last Name:

Credit Card Number:

Expiration (MM/YYYY): 1 / 2018

Billing Address:

City: State: Select One Zip:

By submitting this card, you acknowledge that you are authorized to use this card on the card holder's behalf. You also acknowledge that the Borrower has indicated their intent to proceed with this loan.

Update Payment Information

Order Appraisal Close

Completed Orders – Report Delivery

When an order is marked as COMPLETED, you will see all the documents available for your delivery. Typically the following documents are delivered when a report is marked as completed:

- a. Appraisal Report
- b. UAD XML Report (For UAD orders)
- c. Order Invoice
- d. Compliance Certificate
- e. SSR Reports (Only for orders submitted to the UCDP)

NOTE: Any additional documents can be sent via the Encompass interface based on your requirements.

To retrieve completed reports and supporting documents, follow the steps below:

1. Log on to Encompass
2. Open up the loan for which they wish to order the appraisal.
3. Go to the Services tab and click on Order Appraisal
4. On the next screen, choose **Collateral Management** from the list of appraisers.
5. Enter your **Collateral Management** username and password to log on. Check the **Remember Me** box to save your credentials:
6. On the next screen, click the **Check Status** tab. For any COMPLETED order, click on the order to see all attached documents for the order and comments posted for the order. Double click a document to open it.

- Right click any document in the documents list and click on **Send to Encompass eFolder** to send it to the Appraisal folder for the loan. All documents sent this way will be consolidated under the Appraisal folder within your Encompass eFolder.

Order Detail - Collateral Management LLC
✕



Loan Information

Borrower: Shawna Test

Co-Borrower: John Test

Property Address: 1234 W Bent Tree Dr Los Angeles CA 90028

Loan Number: 1606000054

Loan Amount: 750000.00

FHA Case Number: N/A

Order Contacts Payment Check Status

Order Status Refresh

Order Number	Date	Products	Status
R14-00009	07/11/2014	URAR - Single Family - 1004	Completed

Documents Add

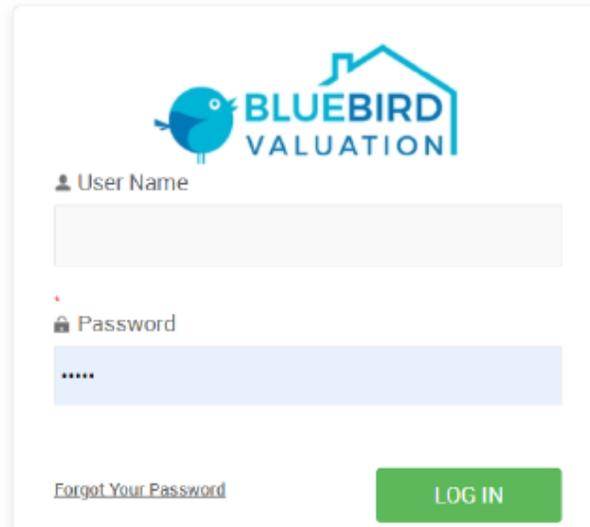
Document Name	Type
17.pdf	Sales Contract
Getting Started.pdf	Appraisal Report
Invoice_R14-00009	Invoice

Comments Add

Date	Sender	Comment Detail
7/11/2014 2:33 PM	testclient	Testing a comment to see how it would look

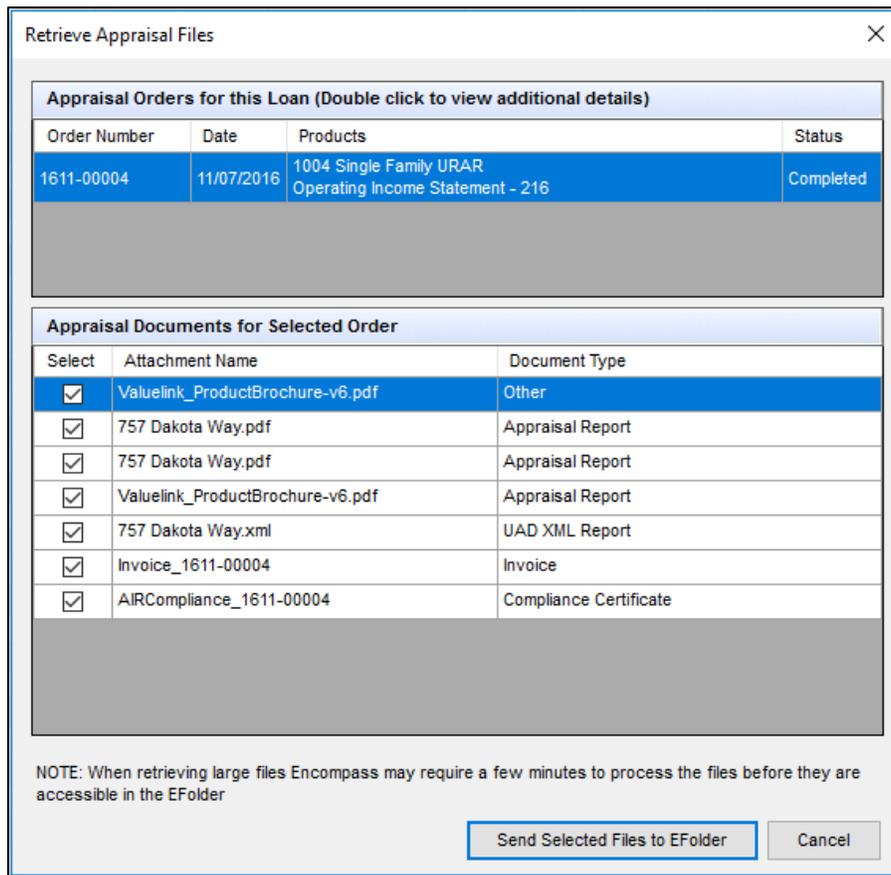
Order Appraisal
Close

- The window below will open. Enter your **Collateral Management** username and password to log on. Check the **Remember Me** box to save your credentials:



The login form features the Bluebird Valuation logo at the top, which includes a blue bird icon and the text 'BLUEBIRD VALUATION'. Below the logo, there are two input fields: 'User Name' and 'Password'. The 'Password' field is masked with six dots. At the bottom left, there is a link for 'Forgot Your Password', and at the bottom right, there is a green 'LOG IN' button.

- This will open up the Retrieve Files box allowing you to select the Documents you want to download to your E-Folder.



The 'Retrieve Appraisal Files' dialog box contains two tables. The first table, 'Appraisal Orders for this Loan', shows a single order with the following data:

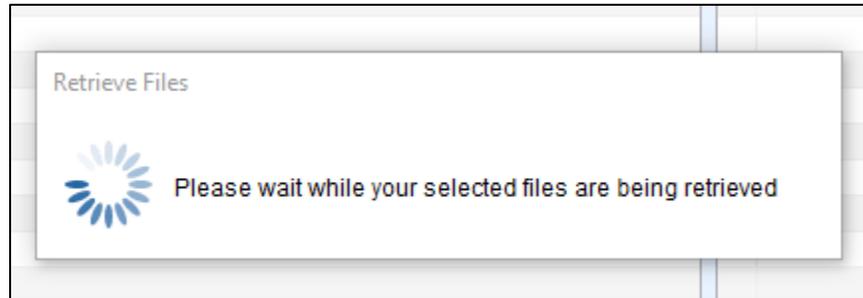
Order Number	Date	Products	Status
1611-00004	11/07/2016	1004 Single Family URAR Operating Income Statement - 216	Completed

The second table, 'Appraisal Documents for Selected Order', lists the following documents:

Select	Attachment Name	Document Type
<input checked="" type="checkbox"/>	Valuelink_ProductBrochure-v6.pdf	Other
<input checked="" type="checkbox"/>	757 Dakota Way.pdf	Appraisal Report
<input checked="" type="checkbox"/>	757 Dakota Way.pdf	Appraisal Report
<input checked="" type="checkbox"/>	Valuelink_ProductBrochure-v6.pdf	Appraisal Report
<input checked="" type="checkbox"/>	757 Dakota Way.xml	UAD XML Report
<input checked="" type="checkbox"/>	Invoice_1611-00004	Invoice
<input checked="" type="checkbox"/>	AIRCompliance_1611-00004	Compliance Certificate

At the bottom of the dialog, there is a note: 'NOTE: When retrieving large files Encompass may require a few minutes to process the files before they are accessible in the EFolder'. Two buttons are located at the bottom right: 'Send Selected Files to EFolder' and 'Cancel'.

7. Click on the **Send Selected Files to eFolder** button to download the appraisal documents to your E-Folder. Wait for the pop-up to close to finish the document download.



Populating Appraisal fields in Encompass

Option 1:

Under 'Check Status' tab, right-click on any completed order to see the additional options for the order. Click 'Set Appraisal Info in Loan file' to send the fields to Encompass. The list of fields being populated in Encompass are listed in Appendix A (at the end of the document).

The screenshot displays the 'Order Detail - Collateral Management LLC' window. It features the Bluebird Valuation logo on the left and a 'Loan Information' section on the right. The 'Check Status' tab is selected, showing a table of order statuses. A right-click context menu is open over the first row, with an arrow pointing to the 'Set Appraisal Info in Loan File' option. Below the table are sections for 'Documents' and 'Comments'.

Loan Information

Borrower	Shawna Test
Co-Borrower	John Test
Property Address	1234 W Bent Tree Dr Los Angeles CA 90028
Loan Number	1606000054
Loan Amount	750000.00
FHA Case Number	N/A

Order Status

Order Number	Date	Products	Status
185-00013	05/02/2018	1004 C	Completed

Documents

Document Name	Type
1600102527_APR_06-05-2017_TCV_185-00013____.pdf	Appraisal Report
25 Sequoia Rd.xml	UAD XML Report
Invoice_185_00013.pdf	Invoice
AIRCompliance_185-00013.pdf	Compliance Certificate

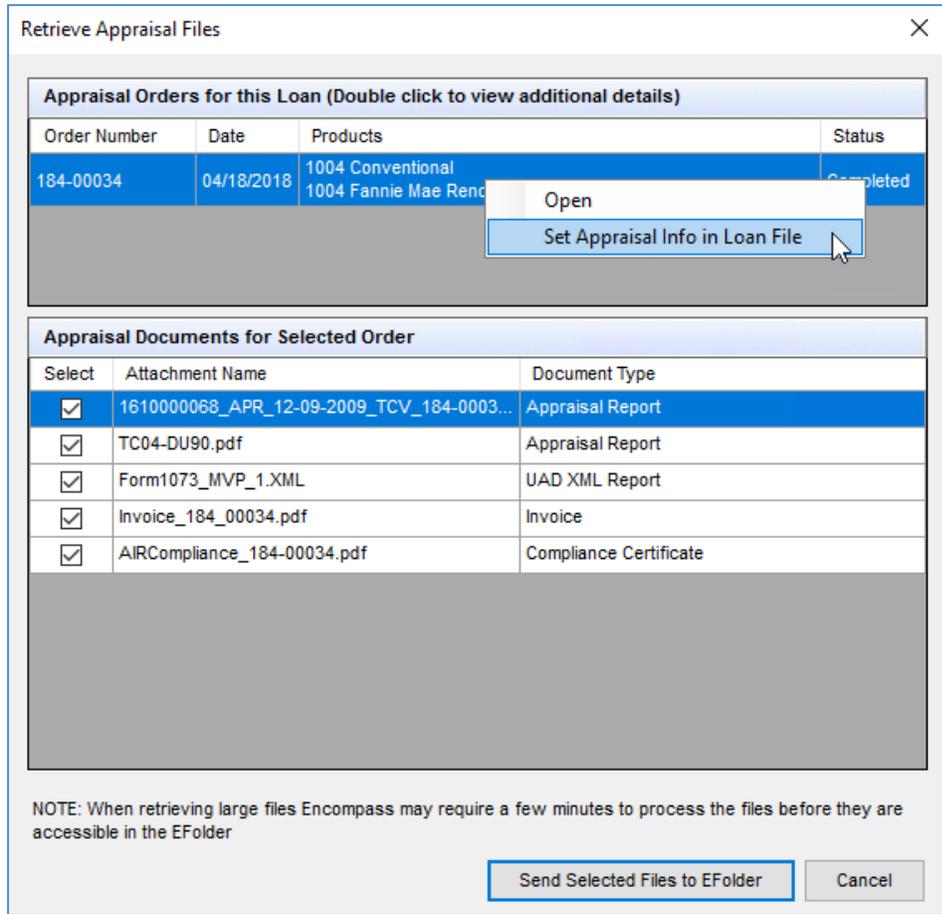
Comments

Date	Sender
------	--------

Buttons: Order Appraisal, Close

Option 2:

In Encompass, open the loan file and click the 'e-Folder' button on the top right corner of your screen. After you have logged on, the following dialog box will appear. On this screen, right-click the Order as shown below and click on "Set Appraisal Info in Loan File". This will populate the fields mentioned in Appendix A into your Encompass loan file.



Support

For any issues with the Encompass integration you may contact the ValueLink Software Support Desk at support@valuelinksoftware.com or by calling 1.888.587.0805 x2.

Appendix A

List of Fields being set in Encompass

	Field Name	Encompass Field Code	Notes
1	Appraised Value	356	
2	Original Appraised Value	2355	
3	Date Ordered	REQUEST.X21	
4	Appraisal Ordered	2352	Field is not over-written if it already has a value
5	Appraiser's Name	618	
6	Original Appraiser	2351	Field is not over-written if it already has a value
7	Appraisal Type	2356	Field is not over-written if it already has a value
8	Appraisal Completed	2353	Field is not over-written if it already has a value
9	Appraisal Fee	440	
10	UCDP Doc File ID	ULDD.X31	
11	Appraiser License Type	Vend.X696	Only populated when UAD XML file is present
12	Appraiser License State	Vend.X697	Only populated when UAD XML file is present
13	Year Built	18	Only populated when UAD XML file is present
14	# of Bedrooms	2369	Only populated when UAD XML file is present
15	Sup. Appraiser's License #	3243	Only populated when UAD XML file is present
16	Appraiser's License #	974	Only populated when UAD XML file is present Only populated when Supervisor's License Number does not exist in the XML report