

Mercury Network

Order Management:
Quick Start Guide

a la mode, inc.®

The leader in real estate technology



Welcome to Mercury Network

Mercury Network's tools allow lenders and AMCs (appraisal management companies) to manage their vendor workflow process from a cloud-based platform in compliance with UMDP, appraisal independence standards, and security regulations. Mercury Network is not an appraisal management company, but rather a technology provider for AMCs and lenders.

For complete details on all aspects of Mercury Network, be sure to consult all of our resources at www.MercuryVMP.com/help.

If you have questions, call your client relations team at **1-888-794-0455** or e-mail them at clientrelations@alamode.com.

You can also call your account representative at 1-800-434-7260.

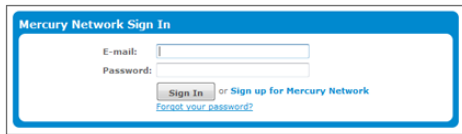
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Logging In

To log into your Mercury Network account...

1. Visit www.mercuryvmp.com and click **Sign In**.
2. In the box that appears, enter your Mercury Network **Username** and **Password**, then click **Sign In**.

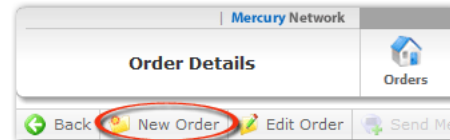


The screenshot shows a web form titled "Mercury Network Sign In". It contains two input fields: "E-mail:" and "Password:". Below the "E-mail:" field is a "Sign In" button. To the right of the "Sign In" button is the text "or Sign up for Mercury Network". Below the "Password:" field is a link that says "Forgot your password?".

Enter Orders

To enter a new order through Mercury Network...

1. Log into your Mercury Network account.
2. Click **Orders** in the menu at the top of the screen.
3. In the screen that appears, click **New Order** in the toolbar just below the main toolbar.



4. Fill out as many order details as possible. At a minimum, be sure to specify a form type, due date, and complete property address.
5. If you want to limit the appraisers that can receive this order to just those within a specific **order group** in your free panel, select that **Order Group** from the drop-down menu.

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6. Click **Next** when finished and then...
 7. **Select your payment method.** If required, enter your credit card information, review any applicable fee notes, select an order expiration time for the order (date, time, time zone), and check the box to confirm that you understand the potential for additional fees as per the fee notes. Then, click **Finish** to place your appraisal order.

Note: When placing an order, you'll notice in the **Payment Information** section that the median fee and the appraiser's published fee are displayed for you. The appraiser's published fee is automatically entered in the **Appraisal Fee** field. If you do not change that fee, you will not be responsible for the Mercury Network transaction fee when the appraiser accepts the order. However, if you enter an amount lower than the median fee and the appraiser's published fee, you will be responsible for the Mercury Network transaction fee when the order is accepted.

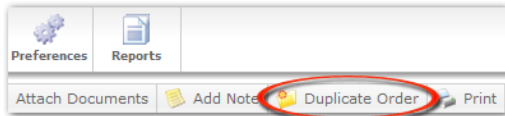
Once you've placed an order and until it expires (which occurs after a default of 24 hours, or a time that you set when you placed the order) you can access it through both the **Awaiting Acceptance** and **All Open Orders** filters on the left side of your Mercury order manager.

- If the appraiser declines the order or does not acknowledge your order by the time it expires, Mercury will either reassign the order or mark it for reassignment so you can reassign it depending on your ordering preferences.
- If the appraiser conditionally declines the order based on the proposed due date or fee for the appraisal, Mercury marks the order as "Conditionally Declined" allowing you to accept the proposed changes or **negotiate about the order details.**

Duplicate Orders

On occasion, you may need to duplicate an existing order for use as a “template” for a new order that you’re creating. This is especially useful when you need to place an order for the same appraisal because an appraiser cancelled the original. It is also handy when you need to order follow up products (e.g. 1004D) from the same appraiser who did your original order. To copy an existing order as a template for another order...

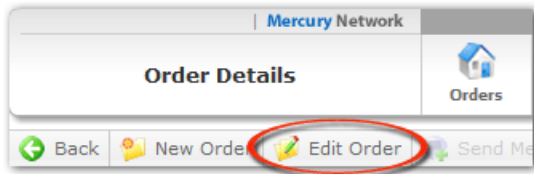
1. In Mercury Network, click the status of the order you want to duplicate in the list of folders on the left.
2. Find the order in the list on the right and double-click it.
3. When the order loads, click **Duplicate Order** in the top toolbar.
4. Mark the option to indicate whether you want to place a new order with the same appraiser or with a different appraiser. Also, select whether or not any documents attached to the original order should be attached to the new order. Then, click **Enter New Order**.
5. Fill out the required order details or changes and click **Next**.
6. Depending on your Mercury Network ordering preferences and whether you indicated that you need to use a different appraiser, you may need to select an appraiser for the job.



Edit Orders

Once an appraisal has been accepted by the appraiser, you can always go back and update the order at a later time if necessary. To do so...

1. In Mercury Network, click the folder to the left to filter just the order you want to view.
2. Find the order in the list of open orders and double-click it.
3. When the order loads, click **Edit Order** in the top toolbar.

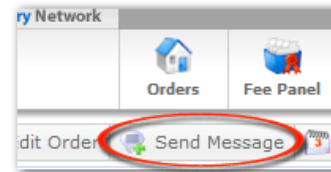


4. Update any necessary order details and click **Save** when finished to update the order.

Send Messages

If you need to send a message to the appraiser handling your order, you can do so through the Mercury Network. To do so...

1. In Mercury Network, click the status of the order you wish to send a message about in the folder list on the left.
2. Find the order in the list of open orders and double-click it.
3. Click **Send Message** in the top toolbar.



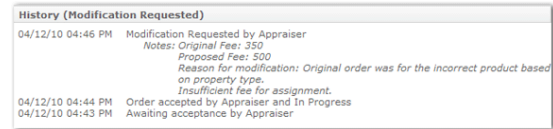
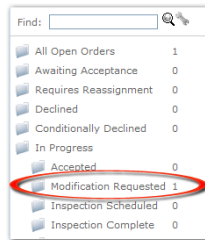
4. Then, do one of the following:
 - **If you're using double-blind ordering** — Select one of the provided messages and click **Send**.
 - **If you're not using double-blind ordering** — Type the message the appraiser should receive, and click **Send**.

Modification Requests

After accepting an order, the appraiser may determine that there needs to be some change to the order. This change affects the job type, due date, fee, or payment method. When the appraiser changes the status to **Modification Requested** you will receive a notification, and must respond for the order to continue.

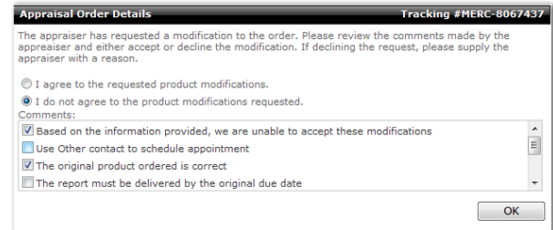
If you receive a notice that one of your orders has a status of **Modification Requested...**

1. Log into Mercury Network.
2. By default, you'll be viewing your list of open orders. To view the order for which modification was requested, click the **Modification Requested** folder on the left.
3. Now you'll be viewing any orders for which modification has been requested. Double-click on any order to view the details.
4. In the history of the order, you will see when the modification was requested, what changes were made, and the appraiser's reason for the changes.



5. If the order is not double-blind, choose whether you **agree** or **do not agree** to the modification, then type any comments regarding your decision in the **Comments** field.

If the order *is* double-blind, you'll still choose whether you agree or do not agree. But, if you agree, you will not be able to type any comments, and if you *do not agree* you will need to choose from a list of pre-written responses.

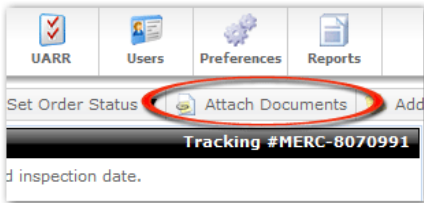


6. When you are satisfied with your response, click **OK**. The order will now have a status of "In Progress" and the appraiser will receive a notification that the modification has been approved or declined.

Attach Documents to Orders

When you need to attach a sales contract, preliminary title report, or any other document the appraiser requires...

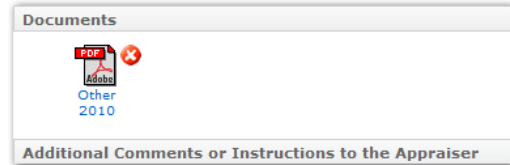
1. In Mercury Network, click the status of the order to which you wish to attach documents in the folder list on the left.
2. Find the order in the list of open orders and double-click it.
3. Click **Attach Documents** in the top toolbar.



4. In the screen that appears, you can attach documents to the appraisal order either by fax or by directly uploading the files.
 - **Attach by Fax** — If you only have a hard copy of the document, click **DirectFax**, print the fax cover page that appears, and fax your document to the number listed in the cover sheet with the cover sheet on top. After a few moments, our DirectFax servers will convert your fax to a PDF and attach it to your order.

- **Attach by Upload** — Click **Upload, Browse** to the file you wish to attach to your order and click **Open** to attach it.

5. Once your document is attached to the order, it appears in the **Documents** section of the order. Just click the attached document if you wish to view it. To remove the document, click the **red X** to the right of the document.



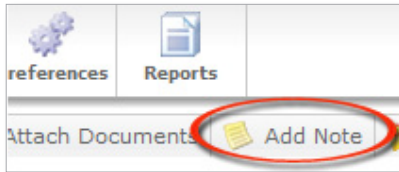
Note: Any attachments that you include with your order will remain on the network for 90 days. After 90 days, the attachments are automatically removed from the order.

Add an Internal Note

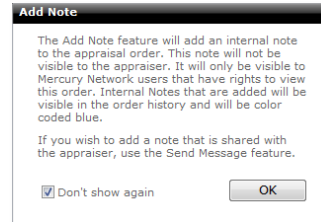
Using the Add Note feature, you can insert a note that will be preserved in the audit trail, but the appraiser will not be notified nor be able to see the note. It's entirely for your own audit purposes.

To add the note...

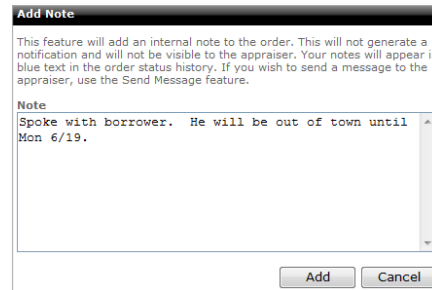
1. In Mercury Network, click the status of the order to which you need to add a note.
2. Find the intended order in the list on the right, and double-click it.
3. Click **Add Note** on the toolbar.



When you do, you'll see a notice explaining the purpose of adding a note. If you don't wish to see this notice again, select **Don't show again**. Then, click **OK**.



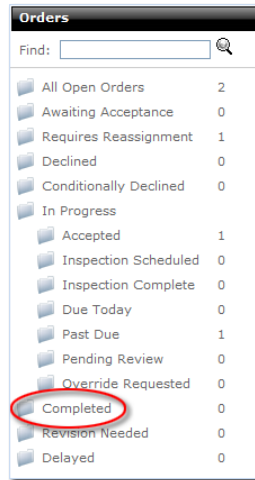
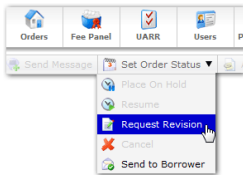
4. Now, you can type any message you wish in the space provided. Since this is an internal note, none of the double-blind restrictions apply to what you can type here. When you are finished with your note, click **Add** to commit it to the order's history, where it will be highlighted in blue.



Request Revisions

If you need to request a revision to a completed appraisal order...

1. In Mercury Network, click **Completed** in the list of order statuses on the left.
2. Find the order in the list of orders and double-click it.
3. Click **Set Order Status, Request Revision** in the top toolbar.

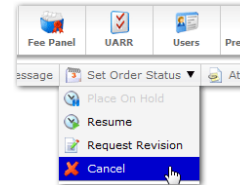


4. In the screen that appears, type a message explaining the reason you're requesting the revision and then click **OK** to send the revision request. Since the order has already been completed, you can type a "free-form" message because HVCC rules no longer apply.

Cancel Orders

If you need to cancel an existing order, whether or not it's been acknowledged, you may do so.

1. In Mercury Network, use the **Orders** view to find the order you intend to cancel.
2. Double-click the order to view the details.
3. On the toolbar, click **Set Order Status**, and choose **Cancel**.



4. In the screen that appears, do one of the following:
 - **If you're using double-blind ordering** — Select one of the pre-provided reasons for canceling the order and click **OK**.
 - **If you're not using double-blind ordering** — Type the reason for the cancellation and click **OK**.

Reassign Orders

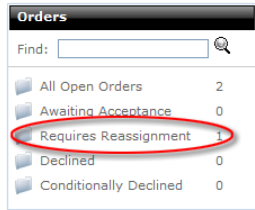
To make your appraisal workflow more manageable, Mercury automatically reassigns the following orders by default:

- Appraisal orders that expire without acknowledgement by an appraiser
- Orders that are declined by the appraiser
- Double-blind Mercury Network appraisal orders

However, you can set Mercury to give you manual control over order reassignment.

To manually reassign an order...

1. In Mercury Network, click **Requires Reassignment** in the folders list on the left.
2. Find the order in the list that appears, and double-click it.



3. Click **Reassign** in the **Appraisal Order Details** section at the top of the order.

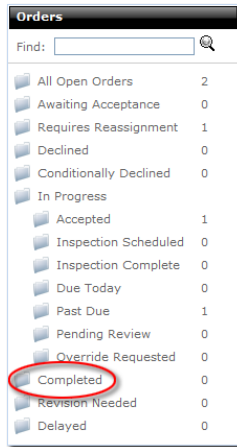
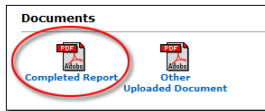


4. When prompted to confirm your order, review the order details, select a preferred **Payment Method**, fill out any necessary payment details, and click **Finish** to reassign the order. If you're prompted for credit card information instead of a preferred payment method, the appraiser you've selected has chose to require payment by credit card. When you enter your credit card information for the order, you will NOT be charged. This simply ensures that you can provide payment by credit card and you will not be charged until the order has been completed and delivered.

Retrieve Completed Orders

To retrieve a completed appraisal order...

1. In Mercury Network, click **Completed** in the list of folders on the left.
2. Find the order in the list of orders and double-click it.
3. Scroll down to the **Documents** section and click **Completed Report** to download the appraisal.



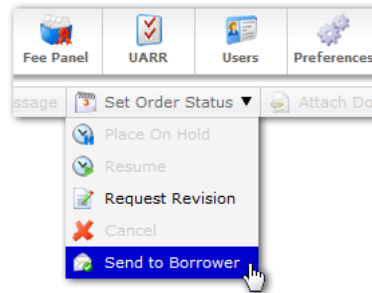
Note: Your completed appraisal order will remain on the Mercury Network for 90 days. After 90 days it is automatically removed from the order.

Send the Report to the Borrower

Once the appraisal has been completed, you can easily send the report to the borrower. When you do, you'll have an "audit trail" in the history for this order. The history will even show when the borrower viewed the report. Best of all, the report is delivered securely, since the appraisal itself is not in the e-mail that the borrower receives.

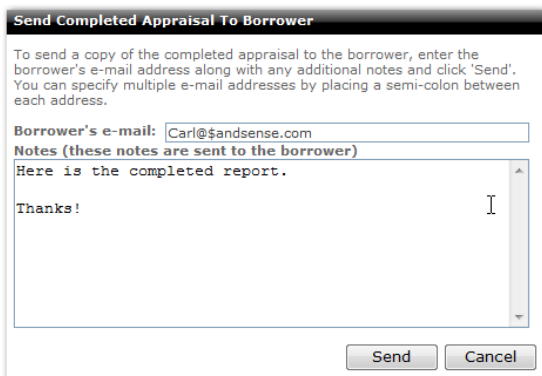
To send the report to the borrower...

1. Open the completed report that you want to send.
2. From the toolbar at the top, click **Set Order Status, Send to Borrower**.



Send the Report to the Borrower (continued)

3. A dialog appears, and you'll see that the borrower's e-mail address will be pre-filled (if one was entered on the order). If necessary, you can type additional e-mail addresses by placing a **semi-colon (;)** between them. Type any note you would like to include in the body of the message the recipients will receive. Then click **Send**.



Send Completed Appraisal To Borrower

To send a copy of the completed appraisal to the borrower, enter the borrower's e-mail address along with any additional notes and click 'Send'. You can specify multiple e-mail addresses by placing a semi-colon between each address.

Borrower's e-mail: Carl@\$andsense.com

Notes (these notes are sent to the borrower)

Here is the completed report.

Thanks!

Send Cancel

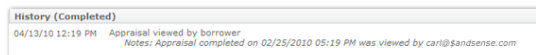
4. When the message is sent, an event will be recorded in the order history.



History (Completed)

04/13/10 12:11 PM Copy of completed appraisal e-mailed to borrower Carl@\$andsense.com by Client (Stefan Sowder)

5. The borrower then receives an e-mail containing a link to the report on a secure server. When the borrower clicks on the link and views the report, you are notified and an event is added to the history indicating when the report was viewed.



History (Completed)

04/13/10 12:19 PM Appraisal viewed by borrower
Notes: Appraisal completed on 02/25/2010 05:19 PM was viewed by carl@\$andsense.com

Support and Training



Finding help is easy

Mercury Network is easy to use, but it's natural to have questions as you get started. We're ready to help and have informative resources to minimize the learning curve.

LIVE TECHNICAL SUPPORT

When you need us, we're here.

1-888-794-0455

IN MERCURY NETWORK

Click **Help Manual** (in the upper right) at any time when you're working in Mercury Network. You'll get access to the complete searchable manual, plus the Mercury Network Video Library.

E-MAIL

Send us an e-mail at clientrelations@alamode.com and we'll get back to you ASAP.

ACCOUNT REP

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ONLINE SUPPORT

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