Creating Orders in Track

This document provides instructions for creating orders in Track, a professional tracking system within ACI that provides the ability to keep track of all your appraisal reports.

Creating Orders in Track

1. Click **File** > **New Order**, or click the **New Order** icon ( ), or press **CTRL+N** on the keyboard.
2. Enter the order information. Leave fields blank if the information is unknown. *Appr File #* is a required field. Letters, numbers, and hyphens are permitted file number characters.

   > **NOTE**: Track differentiates between upper and lower case letters when reconciling file numbers.

   > **TIP**: A drop-down arrow in a field indicates that Common Responses are available. Select from one of the available responses or enter text into the field.

3. Click the **Billing Info** tab. Enter the related billing information. If appraiser fees have been configured in the Appraisers Database, fees automatically display in *Fee Split*.
4. Click the **Additional Info** tab. Enter the contact information for the subject property and client specific instructions.
5. Click the **Comments** tab. Enter miscellaneous order information under *Comments*.

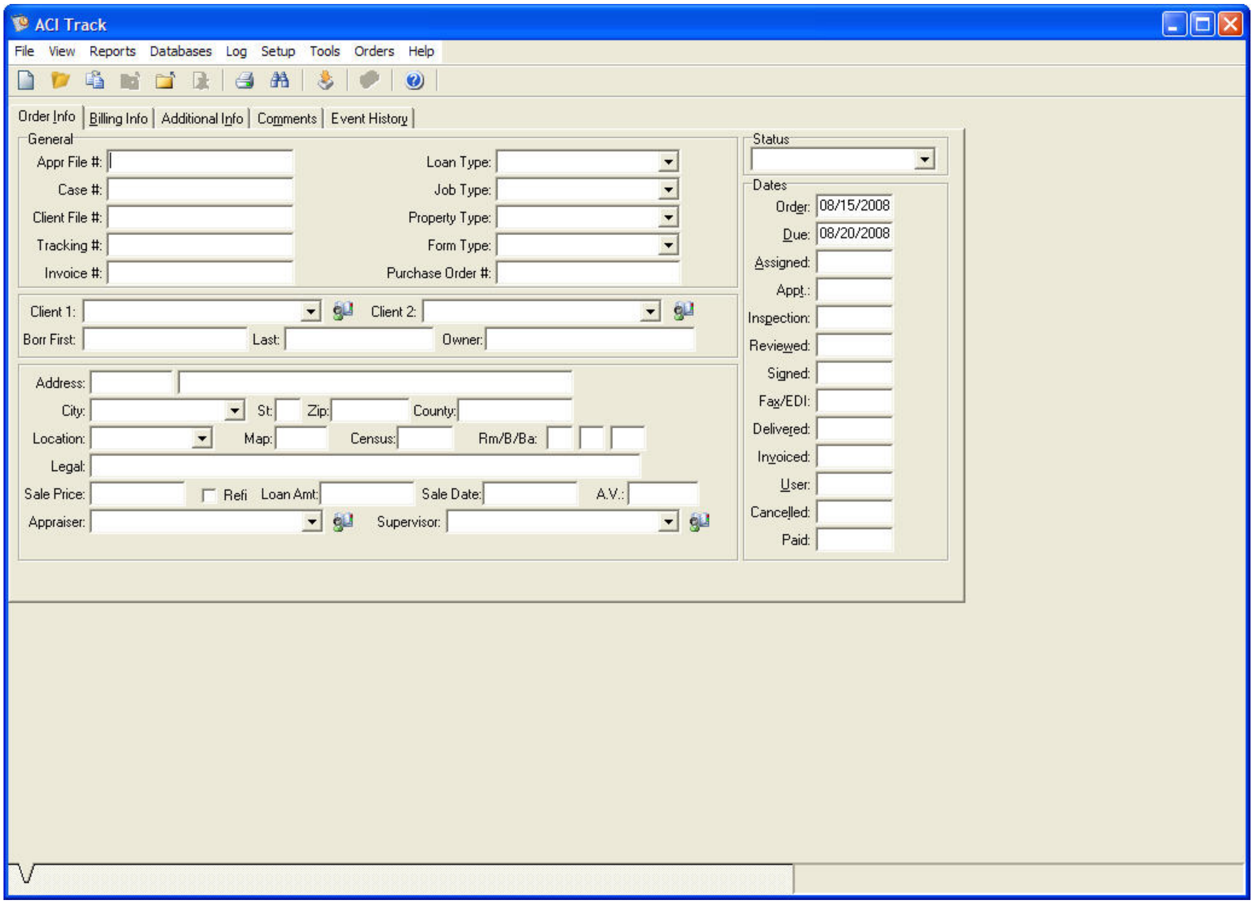
   > **NOTE**: The *DOS File #* is the location of the file on the computer's hard drive. It is the last location from which the file was opened. This field is blank in a new order.

6. Click the **Event History** tab. *Event History* is a log of all events that occur in an order's life. Data recorded in *Event History* does not carry forward to the appraisal report. Some events are recorded automatically upon sending a report file or assigning an appraiser. Additional events are entered manually. Click **Add** to enter an event.
7. Click **File > Save and Close Order**, or click the **Save and Close Order** icon ( ), or press **CTRL+S** on the keyboard to save the order in the Track database.

   > **TIP**: Click the **Launch Report** icon ( ) to open the Report program.
   >
   > **TIP**: When multiple orders are open, click **Orders** on the menu bar and select an order, or click the file number tabs at the bottom of the open window to switch between orders.

The Order Info Tab

The Order Info tab contains general order and client information and property address information. Status and date/times are also included.



General

Appr File #

The unique file number associated with the appraisal. *Appr File #* is a required field.

Case #

User-defined.

Client File #

User-defined.

Tracking #

User-defined. Some management companies include tracking numbers in their orders.

Invoice #

User-defined.

Loan Type

The mortgage type. Click the drop-down arrow and select a *Loan Type* from the pre-defined list, or enter a new type. Add additional types to the menu using the *Common Responses* feature.

Job Type

The appraisal product type. Click the drop-down arrow and select a *JobType* from the pre-defined list, or enter a new type. Add additional types to the menu using the *Common Responses* feature.

Property Type

The structure type. Click the drop-down arrow and select a *Property Type* from the pre-defined list, or enter a new type. Add additional types to the menu using the *Common Responses* feature.

Form Type

The appraisal form. Click the drop-down arrow and select a *Form Type* from the pre-defined list, or enter a new type. Add additional types to the menu using the *Common Responses* feature.

Purchase Order #

User-defined.

Client 1

User-defined. Usually the primary client. Click the drop-down arrow and select a *client* from the user-defined list. Click the **Select/Add Client** icon to open the appraiser database.

Client 2

User-defined. Usually the secondary client. Click the drop-down arrow and select a *client* from the user-defined list. Click the **Select/Add Client** icon to open the appraiser database.

Borr First

The borrower's first name.

Borr Last

The borrower's last name.

Owner

The owner's name.

Address

The subject property street address.

> **NOTE**: Enter the address number in the first field.
> Enter the street name in the second field.

City

The subject property city.

St.

The subject property state abbreviation.

Zip

The subject property ZIP Code.

County
The subject property county.

Location
The subject property location. Click the drop-down arrow and select a *location* from the user-defined list, or enter a location.

Map
The location map reference number.

Census
The census tract number.

Rm/B/Ba
The total number of rooms/bedrooms/bathrooms.

Legal
The legal description of the subject property. Field size is limited to 65 characters.

Sale Price
The sale price.

Refi
Select Refi if the job is for a refinance.

Loan Amt
The mortgage amount.

Sale Date
The transaction sale date.

A.V.
The appraised value of the property.

Appraiser
The appraiser assigned to the job. Click the drop-down arrow and select an *appraiser* from the user-defined list. Click the **Select/Add Appraiser** icon to open the appraiser database.

Supervisor
The supervisory appraiser assigned to the job. Click the drop-down arrow and select a *supervisory appraiser* from the user-defined list. Click the **Select/Add Appraiser** icon to open the appraiser database.

Status
The current stage of the appraisal. Click the drop-down arrow and select a *Status* from the pre-defined list, or enter a *Status*. Add additional types to the menu using the *Common Responses* feature.

Dates

Order

The date of the appraisal order. Auto-populates with the system date when a file number is entered in the *Appr File #* field.

Due

The promised delivery date of the appraisal. Auto-populates based on the settings configured under **Setup** > **Office Controls**.

Assigned

The date of appraiser assignment. Auto-populates with the current system date after selecting an appraiser from the *Appraiser* drop-down list, or after assigning an appraiser using the *Assign Orders* feature.

Appt.

The scheduled appointment date.

Inspection

The scheduled inspection date.

Reviewed

The appraisal review date.

Signed

The signed date.

Fax/EDI

User-defined. The faxed or electronic receipt or delivery date of the appraisal.

Delivered

The delivery date of the appraisal. Auto-populates when a report is sent via **File** > **Send**.

Invoiced

The date the invoice was generated. Auto-populates with the current system date when an invoice is printed from Track.

User

A user defined date field. For consistency, use this field for the same purpose on all orders.

Cancelled

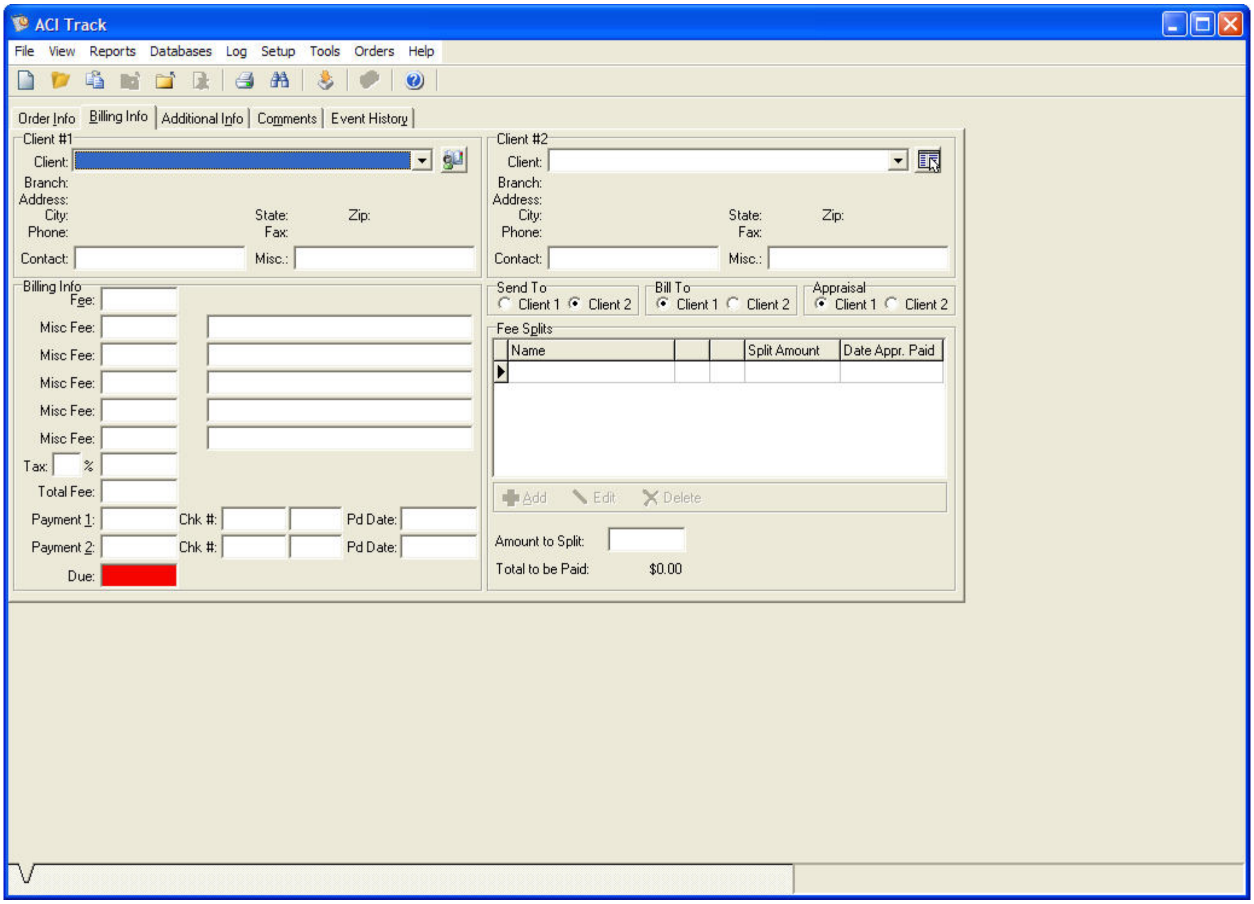
The date the order was cancelled.

Paid

The paid date of the order. Auto-populates when a report is marked paid through the **File** > **Post Payments** feature.

The Billing Info Tab

The Billing Info tab contains Client 1 and Client 2 information, billing information, and fee splits.



Client #1

Client
The client listed as Client 1. Click the drop-down arrow and select a *client* from the user-defined list. Client address information automatically populates. Click the **Select/Add Client** icon to open the appraiser database.

Contact
The Client 1 contact person.

Misc.
User-defined.

Client #2

The client listed as Client 2. Click the drop-down arrow and select a *client* from the user-defined list. Client address information automatically populates. Click the **Select/Add Client** icon to open the appraiser database.

Contact
The Client 2 contact person.

Misc.
User-defined.

Billing Info

Fee
The appraisal fee.

Misc. Fee
Additional fees associated with the job. Enter up to 5 miscellaneous fees and fee descriptions.

Tax %
The tax charged expressed as a percentage. Tax % defaults to the percentage entered in **Setup > Office Controls**. The *tax amount* calculates automatically based on the entered fee and the tax percentage.

Total Fee
Automatically calculated. The total fees charged for the appraisal. Total fee is the sum of the fee, plus miscellaneous fees, plus tax.

Payment 1
The amount of the first payment.

Chk #
The check number of the first payment. Enter the initials for the payment in the second field.

Pd Date
The paid date of the first payment.

Payment 2
The amount of the second payment.

Chk #
The check number of the second payment. Enter the initials for the payment in the second field.

Pd Date
The paid date of the second payment.

Due
Automatically calculated. The Due amount equals the Total Fee less Payment 1 and Payment 2.

Send To
Select the client for report delivery. This is an optional setting used when e-mailing the report from the software.

Bill To
Select the client for the invoice.

Appraisal
Select the client for the appraisal report.

Fee Splits

The calculated amount paid to the appraiser(s). Click **Add**, **Edit,** or **Delete** fee splits.

Amount to Split

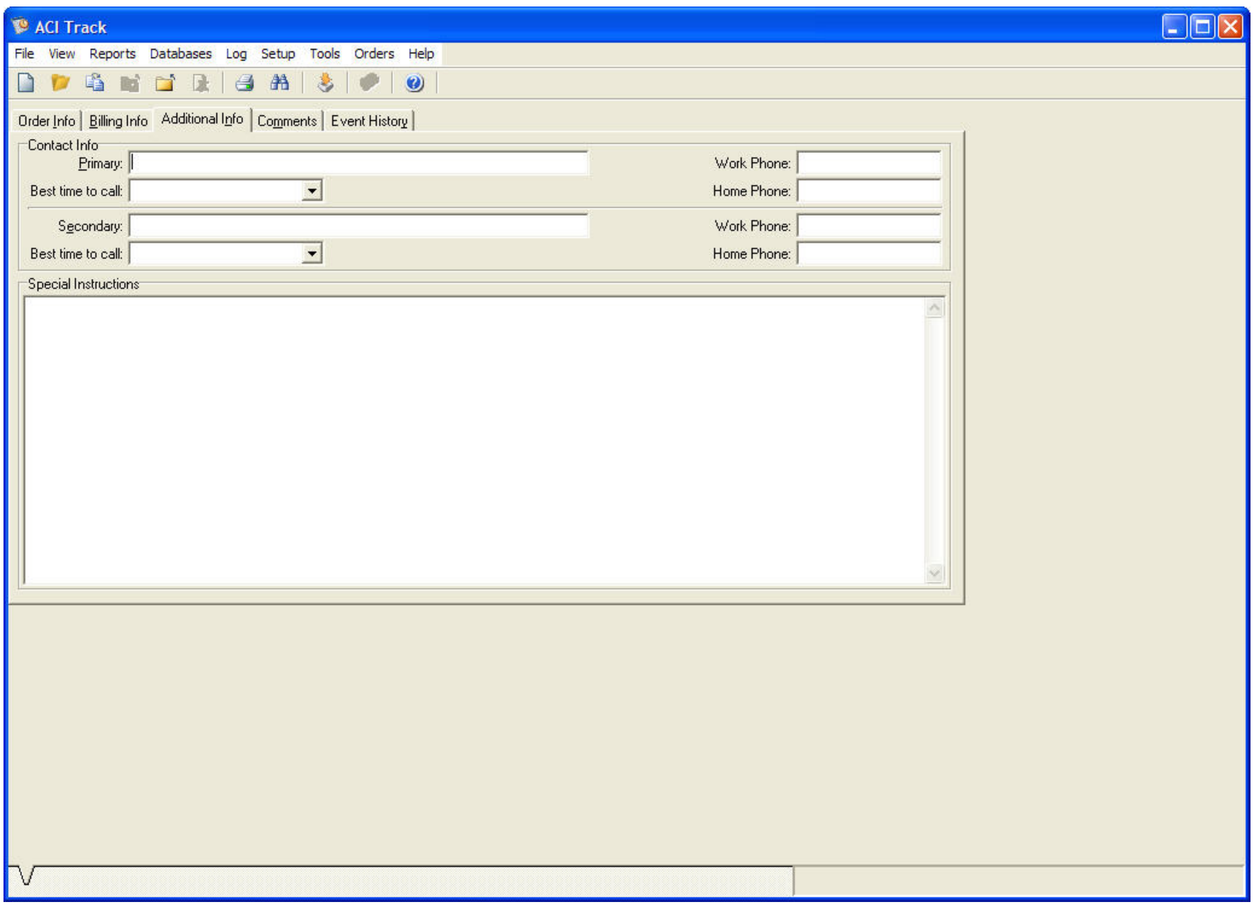
The amount used to calculate fee splits.

Total to be paid

The total amount to be paid. Automatically calculated from the entered billing information.

The Additional Info Tab

The Additional Info tab contains contact information and special instructions.



Contact Info

Primary

The primary contact name.

Best time to call

The best time to call the primary contact. Select *Afternoon*, *Anytime*, *Evening*, *Morning* from the drop-down list, or manually enter a specific time.

Work Phone
The work phone number of the primary contact.

Home Phone
The home phone number of the primary contact.

Secondary
The secondary contact name.

Best time to call
The best time to call the secondary contact. Select *Afternoon*, *Anytime*, *Evening*, *Morning* from the drop-down list, or manually enter a specific time.

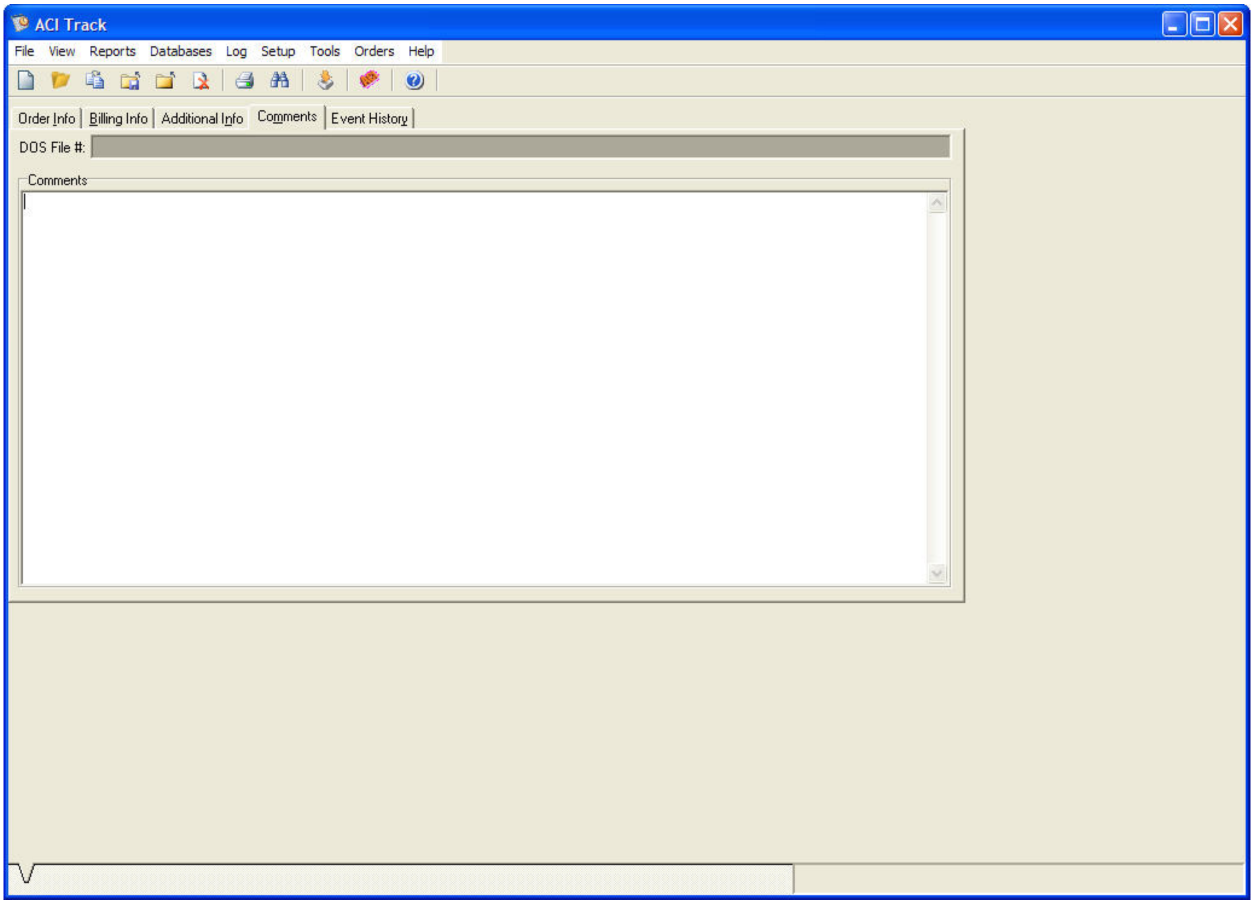
Work Phone
The work phone number of the secondary contact.

Home Phone
The home phone number of the secondary contact.

Special Instructions
Enter special instructions requested by the client.

The Comments Tab

The Comments Info tab contains office comments and instructions.



DOS File #

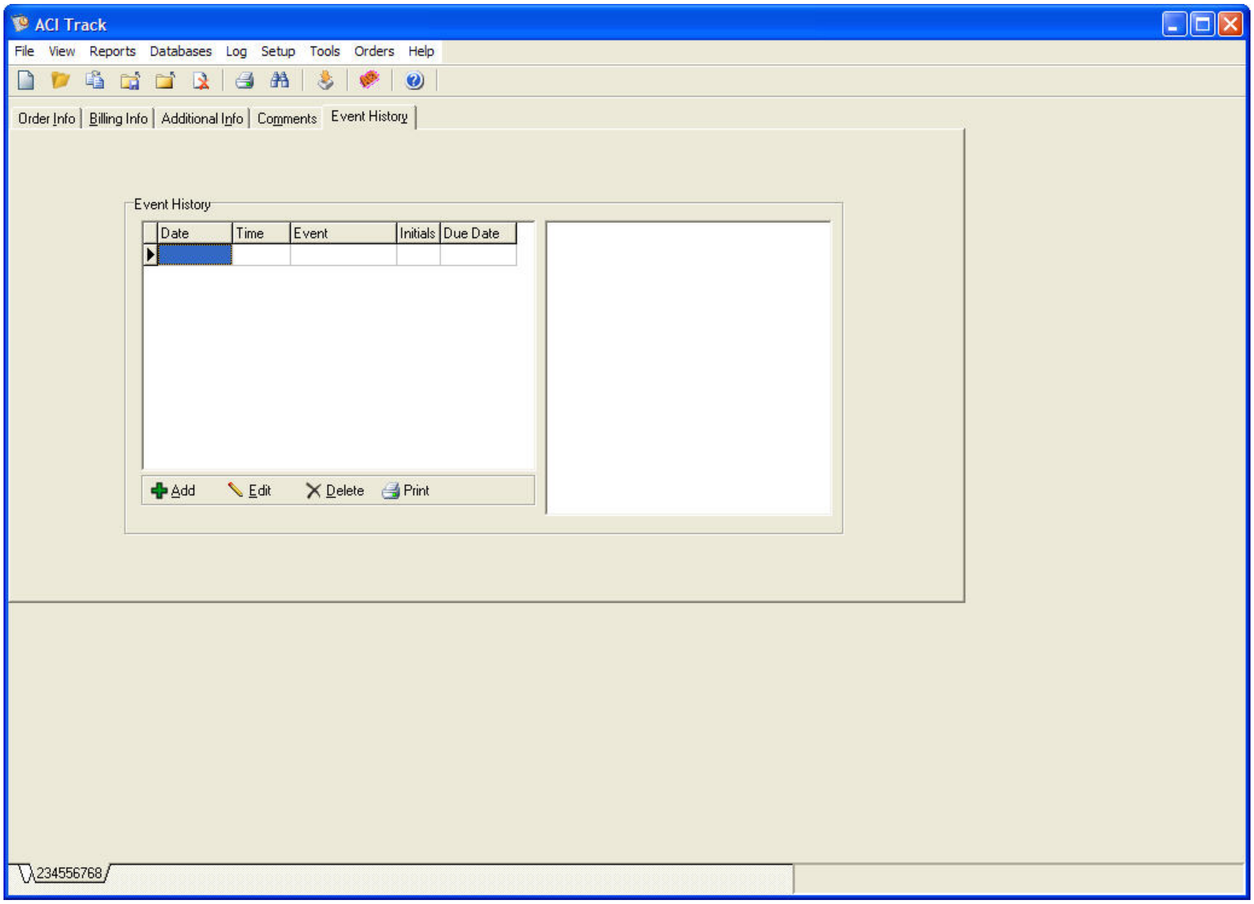
Automatically populated. The location of the file on the computer's hard drive.

Comments

Office comments or special instructions.

The Event History Tab

Event History is a log of all events that occur in an order's life. Data recorded in *Event History* does not carry forward to the appraisal report. Some events are recorded automatically upon sending a report file or assigning an appraiser.



Adding an Event

1. Create a new order or open an existing order.
2. Click the **Event History** tab.
3. Click **Add** to enter an event.
4. The date and time of the event defaults to the computer's current date and time. Manually enter the event date and time for other dates / times.
5. Select an event from the drop-down menu or enter a custom event.
6. Enter event comments and initials of the person recording the event.
7. Click **OK**. Recorded events display chronologically.

Editing a Recorded Event

1. Open an existing order.
2. Click the **Event History** tab.
3. Select an event and click **Edit**.
4. Enter corrections and click **OK** to save.

Deleting a Recorded Event

1. Create a new order or open an existing order.
2. Click the **Event History** tab.
3. Select the event and click **Delete**.

> **CAUTION**: Events are deleted immediately.

Printing a List of Recorded Events

1. Create a new order or open an existing order.
2. Click the **Event History** tab.
3. Click the **Print** icon to print the event history to the default printer.