



Adding Appraisers in Track

This document provides instructions for adding appraisers to the Track database. Once configured, appraisers are quickly and easily assigned to orders and appropriate fee splits are consistently calculated.

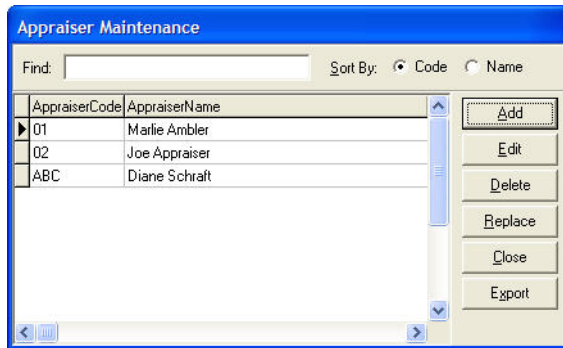
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The Appraiser Database

Set up appraiser fees, delivery options, and service areas in the Appraiser database.

1. Open the Track program.
2. Click **Databases > Appraisers**.



3. Click **Sort By:** *Code* or *Name*.

Code

Sorts appraisers by *Appraiser Code*.

Name

Sorts appraisers by *Appraiser Name*.

TIP: Quickly find an appraiser by entering the first few characters of the *Code* or *Name* in the *Find* field.

4. Select an action.

Add

Enter new appraiser information.

Edit

Update existing appraiser information.

Delete

Remove the appraiser from the database.

Replace

Deletes the selected appraiser from the database and reassigns the appraiser's orders to another appraiser.

Close

Exit *Appraiser Maintenance*.

Export

Exports the appraiser list as a comma delimited (.CSV) file.

Adding Appraisers

1. Click **Add** to open *Appraiser Setup*.

The screenshot shows the 'Appraiser Setup' dialog box with the 'Appraiser Info' tab selected. The form contains the following fields and options:

- Appraiser Code: []
- Name: []
- Designation: []
- QuickBooks Name: []
- Street Address 1: []
- Street Address 2: []
- City: []
- State: []
- Zip: []
- Phone: () - []
- Fax: () - []
- Other Phone: () - []
- Certification #: []
- License #: []
- Quality Rating: []
- Default Appraiser Fee or Percentage: []
- Default Supervisor Fee or Percentage: []
- FHA Approved:
- VA Approved:
- E&O:
- Insurance #: []
- Percentage:
- Percentage:
- Table: []
- Table: []

Buttons: OK, Cancel

2. Enter the appraiser information.

NOTE: *Appraiser Code* and *Appraiser Name* are required fields. These fields may contain letters, numbers and hyphens.

TIP: Select the appropriate *Fee Table* or enter a *Default Appraiser* and *Supervisor Fee* or *Percentage* (optional). The *Fee Split* section of the *Billing Info* tab in new orders populates based upon the *Job Type* selected for that order.

3. Click the **Delivery & Comments** tab to select the appropriate electronic delivery service and enter the delivery address (optional).

Electronic Delivery Service Options

Outlook 98/Exchange

Select this service if the appraisal order is sent using a MAPI compliant e-mail program.

File Copy

Select this service if the appraisal order is not actually sent but is copied to a specified location.

File Move

Select this service if the appraisal order is not actually sent but is moved to a specified location.

Direct LAN

Select this service if the data for the event connects directly to a pop2/smtp mail account without dialing.

4. Add *Appraiser Comments* (optional).
5. Click the **Service Areas** tab to select a service area (optional).
6. Click **OK** to add the appraiser to the database.

Editing Existing Appraisers

Edit existing appraisers using the Edit feature.

1. Click **Databases > Appraisers**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Appraiser Code* or *Appraiser Name* in the *Find* field.
3. Select an appraiser and click **Edit**.
4. Edit the data in *Appraiser Setup* and click **OK** to save changes.

Deleting Appraisers

Delete appraiser records using the Delete feature. Deleting an appraiser removes all references to that appraiser from the order database.

1. Click **Databases > Appraisers**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Appraiser Code* or *Appraiser Name* in the *Find* field.
3. Select an appraiser and click **Delete**.
4. Click **Yes** to confirm deletion or click **No** to cancel.

Replacing Appraisers

The Replace feature deletes the appraiser from the database and reassigns the appraiser's orders.

1. Click **Databases > Appraisers**.
2. Click **Sort By: Code** or **Name**, and enter the first few characters of the *Appraiser Code* or *Appraiser Name* in the *Find* field.
3. Select an appraiser and click **Replace**.
4. Select the replacement appraiser from the drop-down list and click **OK** to update the database.

Exporting Appraisers

The Export feature exports the appraiser database to a comma delimited .CSV (Comma Separated Value) file. Many popular database programs can import .CSV files.

1. Click **Databases > Appraisers**.
2. Click **Export**. Enter the name for the export file and select the destination location.
3. Click **Save** and the database exports.