



Assigning Appraiser Fees in Track

This document provides instruction for automating the assignment of Appraiser fees and fee splits.

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Appraiser Fees

Appraiser and Supervisory Appraiser fees can be a dollar amount, a percentage of the fee, or a flat fee assigned by job type.

Individual Appraiser and Supervisory Appraiser fees populate the *Fee Splits* section of the Billing Info tab of an Order. Enter a total fee for the appraisal and the *Amount to Split* field is automatically populated.

Fee or Percentage Basis

1. Click **Databases > Appraisers**.
2. Select an *Appraiser* and click **Edit**.
3. Enter the *Default Appraiser Fee or Percentage*, or the *Default Supervisor Fee or Percentage*. Select *Percentage* if the amount entered is a percentage. Deselect *Percentage* if the amount entered is a dollar amount. Click **OK**.

Appraiser Setup

Appraiser Info | Delivery & Comments | Service Areas

Appraiser Code: 02 Name: Joe Appraiser

Designation: SRA QuickBooks Name:

Street Address 1: 24 Old Kings Road N. FHA Approved

Street Address 2: VA Approved

City: Palm Coast State: FL Zip: 32137

Phone: (386) 111-1111 Fax: (386) 111-1112

Other Phone: () -

Certification #: PC2345 State: FL

License #: 12345678 State: FL Exp.: 12/31/2010

Quality Rating: E&O Insurance #:

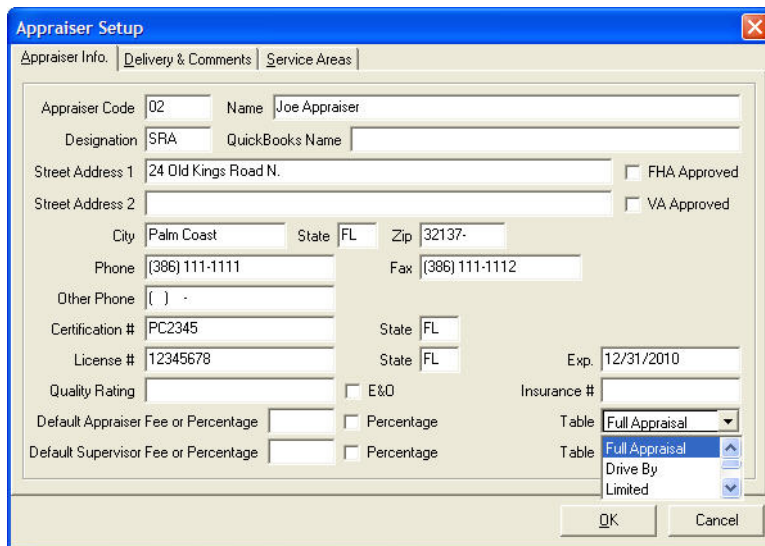
Default Appraiser Fee or Percentage: 50 Percentage Table:

Default Supervisor Fee or Percentage: Percentage Table:

OK Cancel

Using Fee Tables

1. Click **Databases > Appraisers**.
2. Select an *Appraiser* and click **Edit**.
3. Select a *Fee Table* from the drop-down list and click **OK**.



The screenshot shows the 'Appraiser Setup' dialog box with the following fields and values:

- Appraiser Code: 02
- Name: Joe Appraiser
- Designation: SRA
- QuickBooks Name: (empty)
- Street Address 1: 24 Old Kings Road N.
- Street Address 2: (empty)
- City: Palm Coast
- State: FL
- Zip: 32137-
- Phone: (386) 111-1111
- Fax: (386) 111-1112
- Other Phone: () -
- Certification #: PC2345
- State: FL
- License #: 12345678
- State: FL
- Exp: 12/31/2010
- Quality Rating: (empty)
- E&O:
- Insurance #: (empty)
- Default Appraiser Fee or Percentage: (empty)
- Percentage:
- Table: Full Appraisal
- Default Supervisor Fee or Percentage: (empty)
- Percentage:
- Table: Full Appraisal
- Drive By: (empty)
- Limited: (empty)

Buttons: OK, Cancel

NOTE: See *Setting Up Fee Tables* for additional information on using Fee Tables.

The Fee Table Database

Fee tables are designed to make the billing of appraisals more reliable, consistent, and less time consuming. After minimal front end work, Track automatically calculates Appraiser and/or Client fees.

Setting up Fee Tables

1. Click **Databases > Fee Tables**.
2. Click **Add**.

Code	Name
1	Full Appraisal
2	Drive By
3	Limited

Code: 1
Name: Full Appraisal

JobType	Fee
Commercial	
Drive By	
Full Appraisal	
Limited	

3. Enter the fee table *Code* and *Name*. Code and Name are used for internal reference.
4. Enter the appropriate *Fees* for each *Job Type*. Once fees are entered, click **OK** to add the fee table to the database.
5. Click **Close** to exit.

TIP: Data from the Job Type field in the Common Responses database is used to populate the Fees grid. Save time by setting up Common Responses for Job Type first, before creating a fee table.

Editing Fee Tables

1. Click **Databases > Fee Tables**.
2. Select a *Fee Table* click **Edit**.
3. Click in the *Fees* grid, enter the changes, and click **OK**.
4. Click **Close** to exit.

Deleting a Fee Table

1. Click **Databases > Fee Tables**.
2. Select the *Fee Table* and click **Delete**.

CAUTION: Fee Tables are deleted immediately.

3. Click **Close** to exit.

Fee Splits

Fee Splits calculate the amount paid to an Appraiser for a particular appraisal. Setup of Appraiser fees is required to use automatic *Fee Splits*. See *Appraiser Fees* for information on Appraiser fees setup.

Automatic Fee Splits

1. Click **File > New Order**, or click the **New Order** icon (📄), or press **CTRL+N** on the keyboard.
2. Enter the order information, including *Appraiser* and *Supervisor*.
3. Click the **Billing Info** tab.

NOTE: Appraiser and Supervisor carry forward from the *Order Info* tab.

4. Enter the fee in the *Billing Info* section. Fee Splits automatically calculate.

The screenshot shows the ACI Track software interface with the Billing Info tab selected. The Client #1 section is populated with '88 - Megabucks Bank' and address '1111 Main Street, Oak Harbor WA 98277'. The Billing Info section shows a Fee of \$450.00 and a Total Fee of \$450.00. The Fee Splits table contains one entry: 'ABC - Diane Schrott' with a Split Amount of \$300.00. The Amount to Split is \$450.00 and the Total to be Paid is \$300.00.

Name	Split Amount	Date Appr. Paid
ABC - Diane Schrott	300 \$	\$300.00

NOTE: By default, the *Amount to Split* only includes the Fee.

Manual Fee Splits

1. Click **File > New Order** to create an order, or click **File > Open Order** to open an existing order.
2. Enter the order information and click the **Billing Info** tab.
3. Enter the fee in the *Billing Info* section.
4. Click **Add** under *Fee Splits*.
5. Select the *Appraiser Name* and enter the *Fee Split*. Select *Dollar* or *Percent*.
6. Enter the *Paid Date* and *Notes* (optional) and click **OK**.

Fee Split: 47 Water Street

Order Info:
File Number: 12346677998
Remaining Amount: \$0.00
Amount to Split: \$450.00

Name: ABC - Diane Schraft

Fee Split: 150 Dollar Percent

Split Amount: \$150.00

Paid Date: 09/05/2008

Quality Control

OK Cancel

NOTE: The *Paid Date* is the date that the Appraiser is paid. *Notes* are comments, reminders, or any other text.

NOTE: If the *Amount to Split* is greater than the *Remaining Amount*, the *Total to be Paid* displays in red indicating an overpayment.

Editing Fee Splits

1. Click **File > Open Order**. Select an order and click **Open**.
2. Click the **Billing Info** tab.
3. Select an *Appraiser* under *Fee Splits*, and click **Edit**
4. Edit the *Fee Split* details and click **OK**.

Deleting Fee Splits

1. Click **File > Open Order**. Select an order and click **Open**.
2. Click the **Billing Info** tab.
3. Select an *Appraiser* under *Fee Splits* and click **Delete**.

NOTE: Only manually added Fee Split records may be deleted. To delete automatic Fee Split records, click the *Order Info* tab and delete the *Appraiser* and/or *Supervisor* from the order.