



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**.

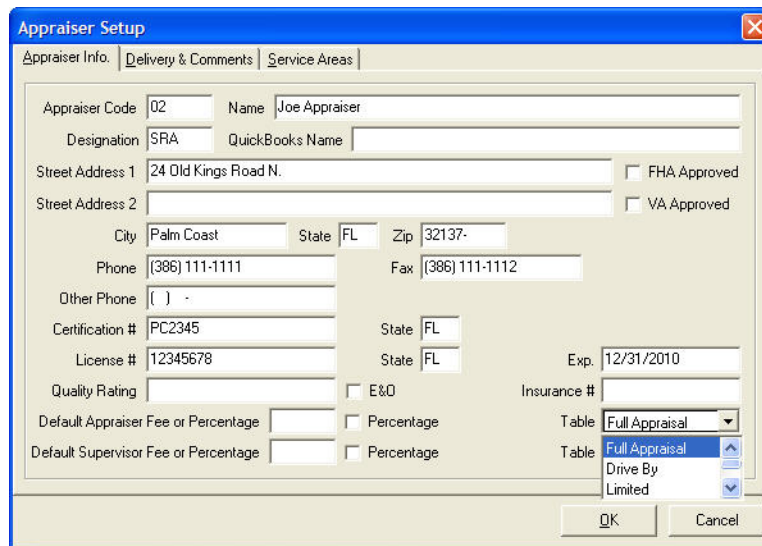
The screenshot shows the 'Appraiser Setup' dialog box with the 'Appraiser Info' tab selected. The form contains the following fields and values:

- 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: 50
- Percentage:
- Table: (dropdown menu)
- Default Supervisor Fee or Percentage: (empty)
- Percentage:
- Table: (dropdown menu)

Buttons: 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:

Field	Value
Appraiser Code	02
Name	Joe Appraiser
Designation	SRA
QuickBooks Name	
Street Address 1	24 Old Kings Road N.
Street Address 2	
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&D	<input type="checkbox"/>
Insurance #	
Default Appraiser Fee or Percentage	<input type="checkbox"/> Percentage
Default Supervisor Fee or Percentage	<input type="checkbox"/> Percentage
Table	Full Appraisal
Table	Full Appraisal
Table	Drive By
Table	Limited

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. The 'Billing Info' tab is active. The 'Client #1' section is populated with '88 - Megabucks Bank' and address '1111 Main Street, Oak Harbor WA 98277'. The 'Client #2' section is empty. The 'Billing Info' section shows a 'Fee' of \$450.00 and a 'Total Fee' of \$450.00. The 'Fee Splits' table has one entry: 'ABC - Diane Schraft' with a 'Split Amount' of \$300.00. The 'Amount to Split' is \$450.00 and the 'Total to be Paid' is \$300.00. The 'Due' amount is \$450.00.

Name	Split Amount	Date Appr. Paid
ABC - Diane Schraft	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.