# Joining the EVO Network

Received an invitation to join the EVO Network? Simply, click "Sign Up" in the email to begin the registration process. Any corresponding documentation will be included as email attachments for your review.

1. Click the **Sign Up** link in the Join EVO Network email.

2. Select **Appraiser** from the Registration page.
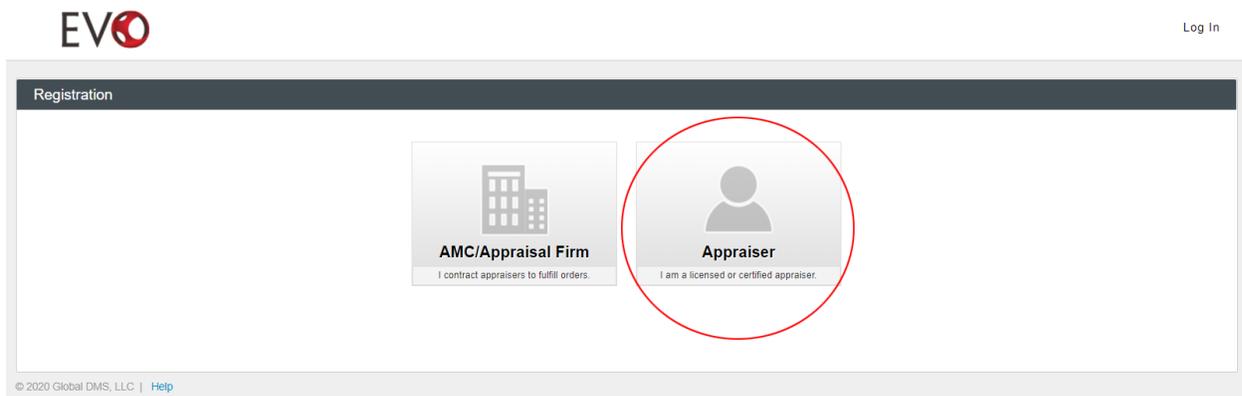
3. Complete the required fields on the registration form and click the **Save** button.

4. You will receive a confirmation email with your **EVO username**. A separate email will be sent with your **temporary password**.

5. **Log in** to EVO to manage your Connection Requests and complete your Vendor Profile (*Add your coverage areas, services, property type and loan info specialties*).

6. Once you have successfully logged in, you must:

❑ Acknowledge the Global DMS Software License Agreement

❑ Establish security questions

❑ Enter a new password

Viewing Connection Requests

EVO connection requests must be accepted prior to receiving appraisal orders from a lender. An alert will be displayed in the top navigation menu if a connection request is pending.
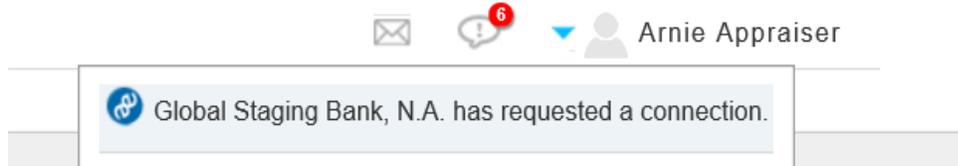
- Clicking on the alert message will redirect you to the **Connection Details** page for the requesting client.
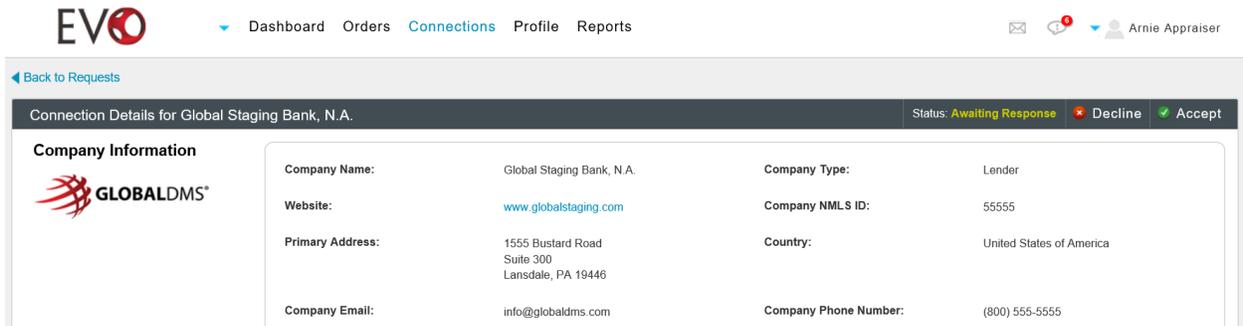
- You can view all pending connections requests by navigating to **Connections >> Requests**.
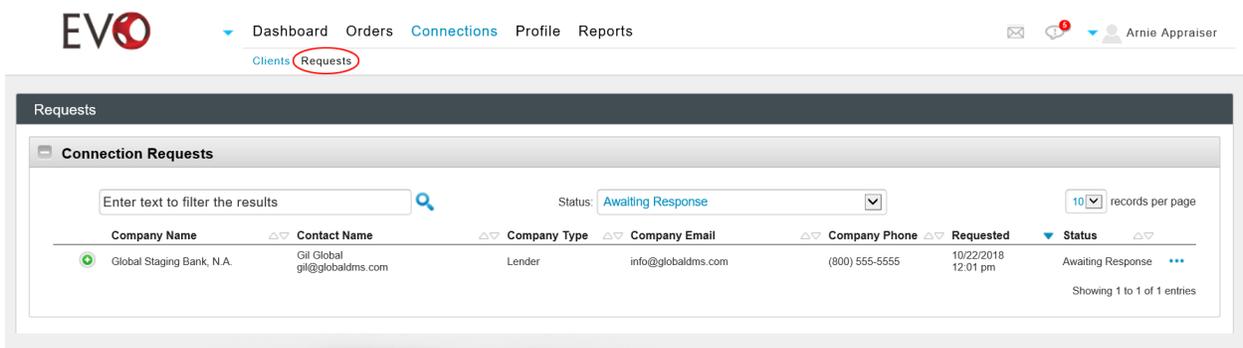
Accepting Connection Requests

To accept a pending connection request:

1. Click the **Accept** button in the Connection Details page header for the requesting Client.

2. The **Accept Connection** window will open.
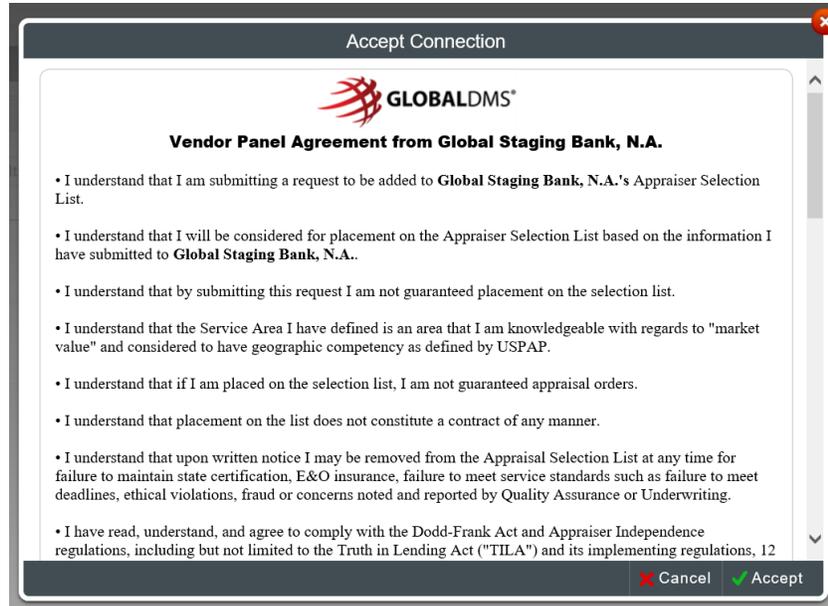
3. If the client requires an agreement to be acknowledged prior to joining their vendor panel, clicking the **Accept** button at the bottom of the window will constitute your signed acceptance of the terms and conditions outlined in the agreement.

   (*An electronically signed version of the Connection Agreement will be attached to the Client's record on the Client Connections page as a PDF*.)

4. An optional message can be entered prior to accepting the connection request.
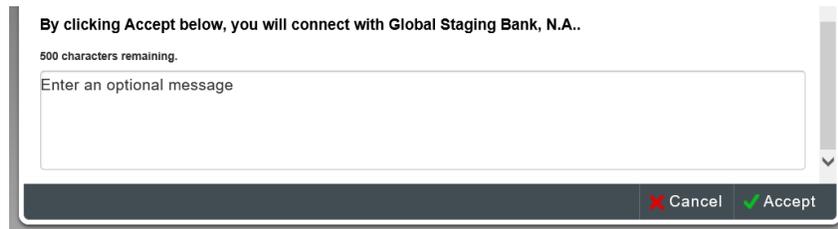
5. Once the connection request has been accepted, you are ready to begin receiving orders from your clients as soon as your Vendor Profile is complete!

Viewing Client Connections

- You can view your client connections by navigating to **Connections >> Clients**.

- The **Signed Connection Agreement** can be accessed by clicking on the plus sign icon adjacent to the Client's record. Click on the link to download the PDF.

- Click on a Client in the **Client Connections** table to view their **Client Detail** page.

Reviewing Company Profile Information

The Company Information you entered when you registered for EVO is displayed on the **Profile >> Overview** page. The information on this page can be edited at any time.

To update your Company Information:

1. Click the **Edit** button in the page header or footer.
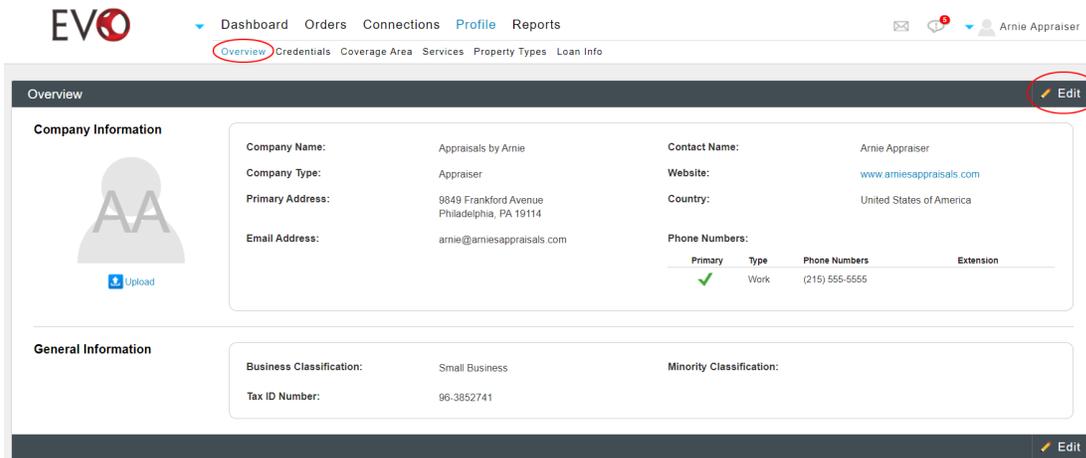
2. Make any necessary updates on the Edit Profile Overview page and remember to click the **Save** button to save your changes.

From the **Profile >> Overview** page, you can also upload a photo or company logo to your EVO Vendor Profile. To upload an image:

1. Click the Upload button under the Company Information section header.

2. **Drop file or Browse** to upload a file in the **Upload Image** window.
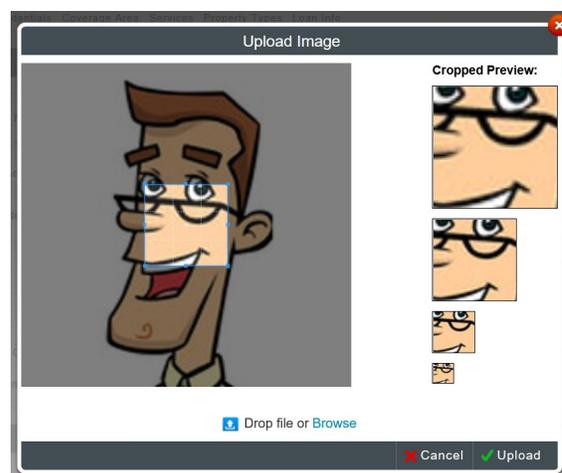
3. Resize the bounding box to adjust the image. The scroll wheel on your computer mouse can be used to zoom in and out on the image.

   As you make adjustments, the **Cropped Preview** will display the image as it will appear in EVO.
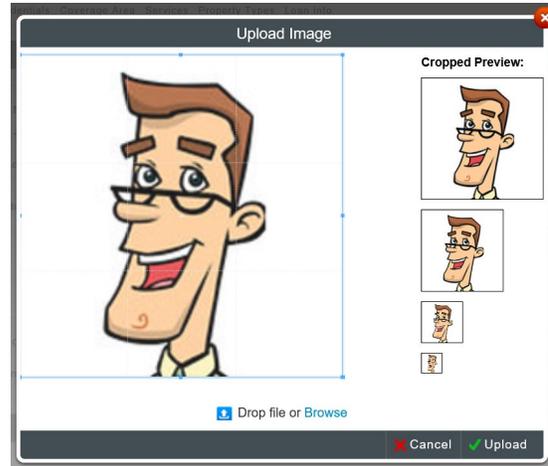
4. Click the **Upload** button.

5. Your image will now be displayed on your Profile.

6. Images can be updated or deleted from the Company Information section on the **Profile >> Overview** page at any time:

   Click the Update Image button under the Company Information section header to replace your Vendor Profile image.

   Click the Trash Can icon to remove the image from your Vendor Profile.

Completing the Vendor Profile

Your Credentials, Coverage Area, Services, Property Types and Loan Info must be configured on your EVO Vendor Profile. Your Profile only has to be established once, and will be administered solely by you going forward. Should you have any other Client Connections in future, your Vendor Profile information will be shared with them as well.

Alerts for missing Vendor Profile information will be displayed to you in the EVO site header.

- Roll over the Alert icon to view your alert messages.

- The number circled in red indicates the number of pending alerts.

- These alerts will display any Vendor Profile areas that have not yet been set up, but are required in order to be eligible for service assignment.

  PLEASE NOTE: Each of your Client Connections will notify you of any other specific requirements that must be met in order to be eligible for assignment.
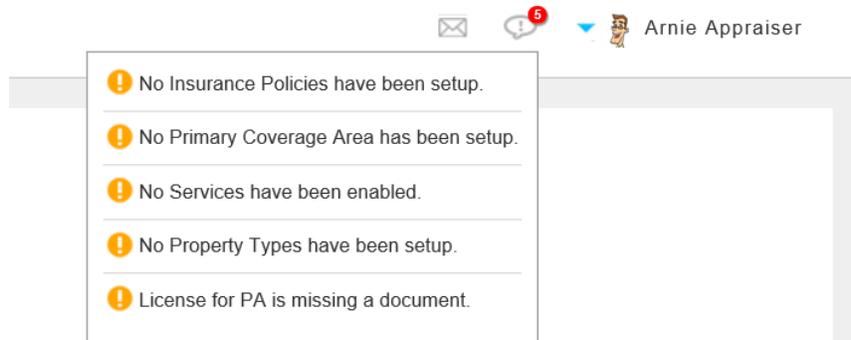
Manage Credentials

You can add/update your credentials by navigating to **Profile >> Credentials**:
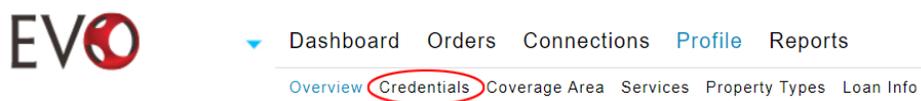
- Appraiser Licenses
- Appraiser Designations
- Experience

- Insurance Policies
- Background Checks
- Additional Documents

Appraiser Licenses

To upload an Appraiser License document for the license you registered with:

1. Click the **Upload** link on the Appraiser License card.
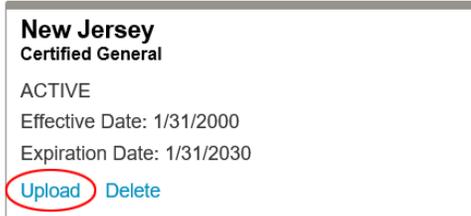
2. **Drop file or Browse** to upload an Appraiser License document in the **Upload Appraiser License Document** window.
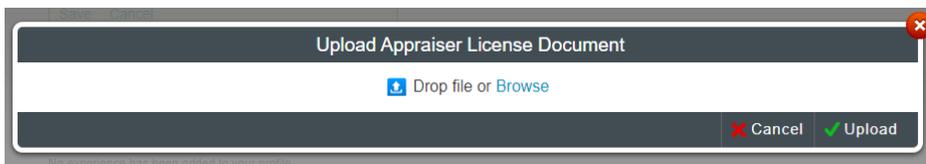
3. Click the **Upload** button.

To add additional Appraiser Licenses to your Profile:

1. Click the **Add** button adjacent to the Appraiser Licenses header (*there is no limit to the number of Appraiser Licenses that can be added*).
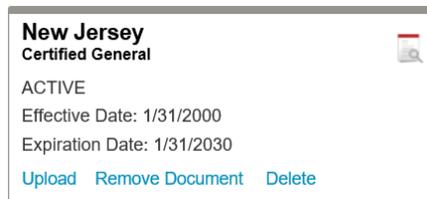
2. In the **Add Appraiser License** card, select the appropriate state from the **License State** drop down menu.

3. Enter the corresponding license number in the **License Number** field.

   An error message will be returned if an invalid license number is entered. Appraiser Licenses are validated against the ASC.gov National Registry.

4. **Drop file or Browse** to upload an Appraiser License document.

5. Click the **Save** button.

6. Repeat these steps to add additional Appraiser Licenses.

To download and view an Appraiser License document, click the Document Preview 🔍 icon on the Appraiser License card.

To remove an Appraiser License document, click the **Remove Document** link on the Appraiser License card.

To delete an Appraiser License, click the **Delete** link on the Appraiser License card.
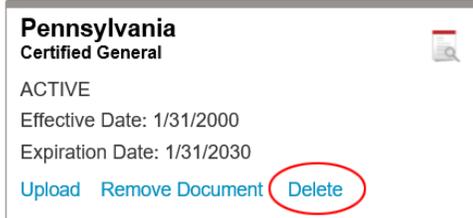
Appraiser Designations

To add Appraiser Designations:

1. Click the Pencil ✏ icon adjacent to the "No appraiser designations have been added to your profile." text.

2. Select one or more Appraiser Designations from the drop down menu.
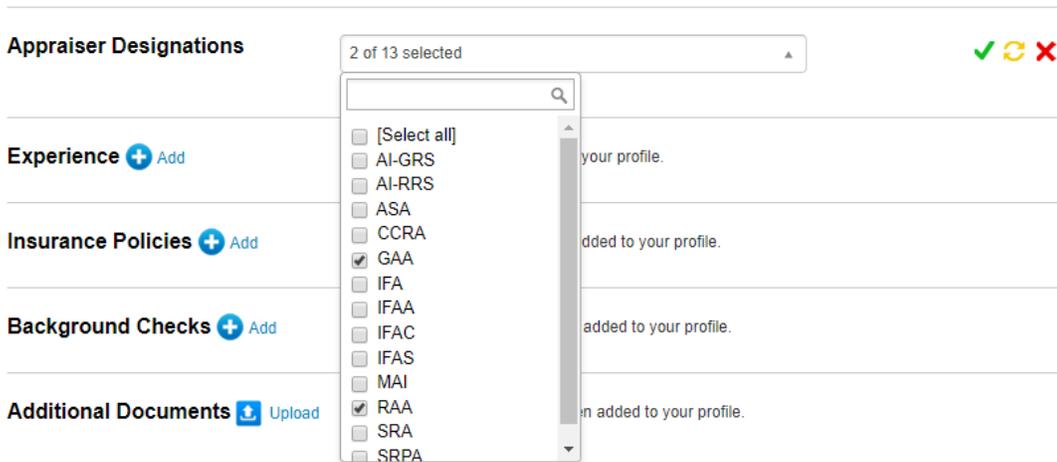
3. Click the Check Mark ✔ icon to save your selections.

(*Clicking the* Reset ↻ *icon will clear your selections. Clicking the* Cancel ✖ *icon will close out of the Appraiser Designation selection field*.)

Experience

To add Experience:

1. Click the **Add** button adjacent to the Experience header (*Experience can be entered for each Appraiser License that has been added*).
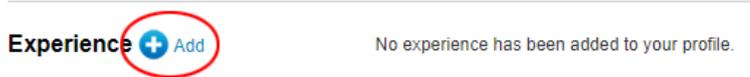
2. In the **Add Experience** window, select a saved **License** from the drop down menu.

3. Enter the **Year Issued** for the selected License.

4. The **License Type** field will be populated based on the License selected.

5. The **Experience** field will be populated based on the Year Issued.

6. Click the **Save** button.

7. Repeat these steps to enter Experience for additional Appraiser Licenses.

Insurance Policies

To add Insurance Policies (General Liability and/or Errors and Omissions):

1. Click the **Add** button adjacent to the Insurance Policies header (*there is no limit to the number of Insurance Policies that can be added*).
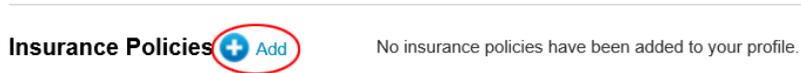

2. In the **Add Insurance** card, select *General Liability* or *Errors and Omissions* from the **Insurance Type** drop down menu.

3. Enter the corresponding **Provider Name** and **Policy Number**.

4. Enter the **Coverage Amount** for the Insurance Policy.

5. Select the **Effective Date** from the date picker calendar (*if a future date is entered, the Insurance Policy will not be active until the Effective Date*).

6. Select the **Expiration Date** from the date picker calendar.

7. **Drop file or Browse** to upload an Insurance Policy document.

8. Click the **Save** button.
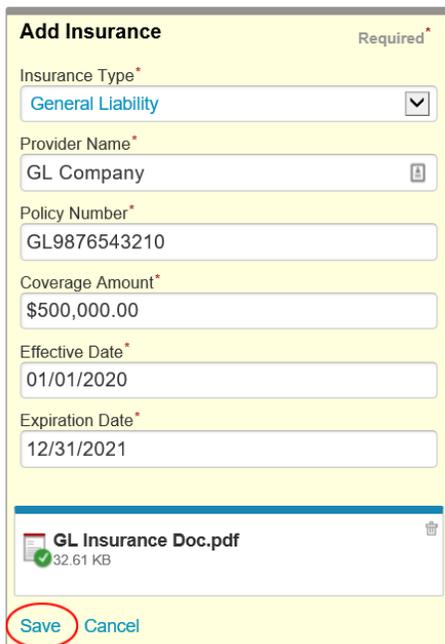
9. Repeat these steps to add additional Insurance Policies.

To edit an Insurance Policy, click **Edit** on the Insurance Policy card.

General Liability
GL Company

GL9876543210
$500,000.00
Effective Date: 1/1/2020
Expiration Date: 12/31/2021

Edit   Upload   Remove Document   Delete
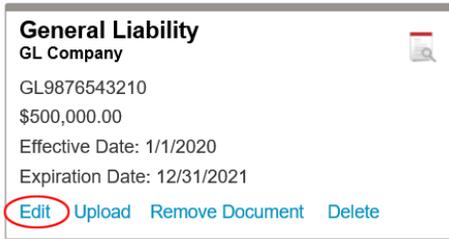
To download and view an Insurance Policy document, click the Document Preview icon on the Insurance Policy card.

General Liability
GL Company

GL9876543210
$500,000.00
Effective Date: 1/1/2020
Expiration Date: 12/31/2021

Edit   Upload   Remove Document   Delete
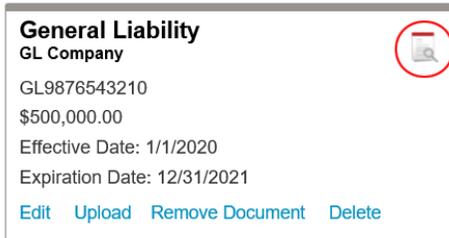
To upload or revise an Insurance Policy document, click **Upload** on the Insurance Policy card.

General Liability
GL Company

GL9876543210
$500,000.00
Effective Date: 1/1/2020
Expiration Date: 12/31/2021

Edit   Upload   Remove Document   Delete
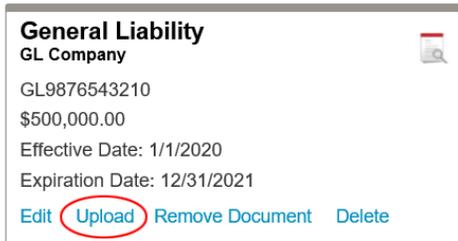
To remove an Insurance Policy document, click **Remove Document** on the Insurance Policy card.

General Liability
GL Company

GL9876543210
$500,000.00
Effective Date: 1/1/2020
Expiration Date: 12/31/2021

Edit   Upload   Remove Document   Delete
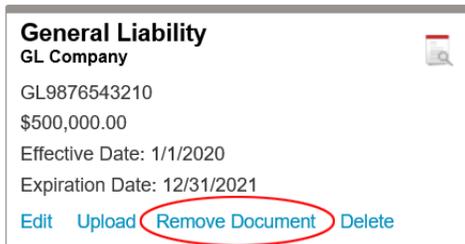
To delete an Insurance Policy, click **Delete** on the Insurance Policy card.

General Liability
GL Company

GL9876543210
$500,000.00
Effective Date: 1/1/2020
Expiration Date: 12/31/2021

Edit   Upload   Remove Document   Delete
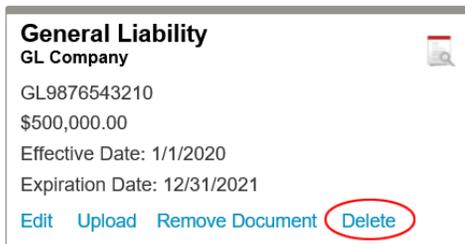
Background Checks

To add Background Checks:

1. Click the **Add** button adjacent to the Background Checks header (*there is no limit to the number of Background Checks that can be added*).
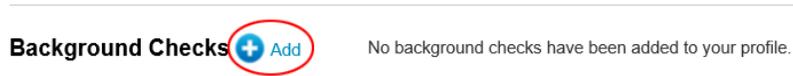

2. In the **Add New Background Check** card, enter the **Provider Name**.

3. Select the **Effective Date** from the date picker calendar (*if a future date is entered, the Background Check will not be active until the Effective Date*).

4. Select the **Expiration Date** from the date picker calendar.

5. **Drop file or Browse** to upload a Background Check document. *A file upload is required*.

6. Click the **Save** button.

7. Repeat these steps to add additional Background Checks.

To edit a Background Check, click **Edit** on the Background Check card.

To download and view a Background Check document, click the Document Preview 🔍 icon on the Background Check card.
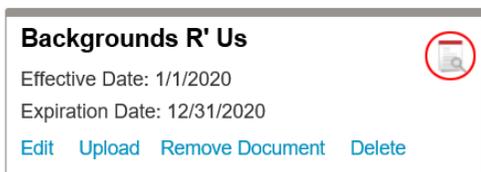

To upload or revise a Background Check document, click **Upload** on the Background Check card.

To remove a Background Check document, click **Remove Document** on the Background Check card.
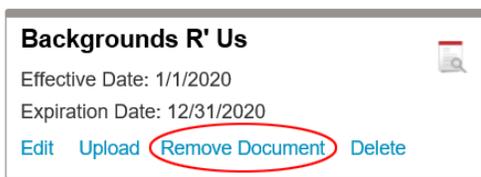

To delete a Background Check, click **Delete** on the Background Check card.
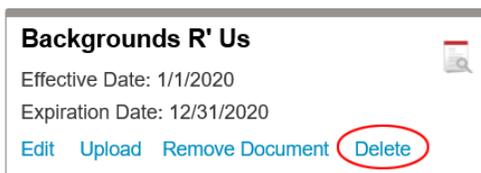
Additional Documents

To upload Additional Documents to your Vendor Profile:

1. Click the **Upload** button adjacent to the Additional Documents header

2. **Drop file or Browse** to upload document(s) in the **Upload Documents** window. (*One or more documents can be dragged and dropped into the window at a time*.)
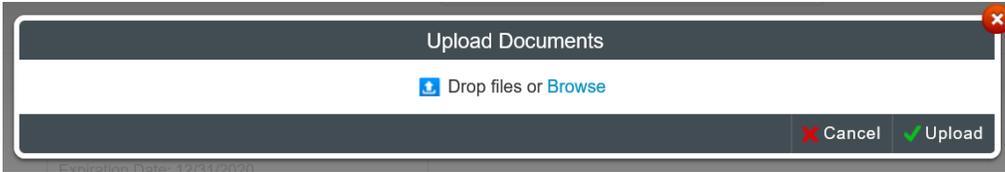
3. A Document Type must be selected for each uploaded document:

   ○ Driver's License
   ○ Photo
   ○ Resume
   ○ Sample Appraisal
   ○ Signature
   ○ W-9
   ○ Other
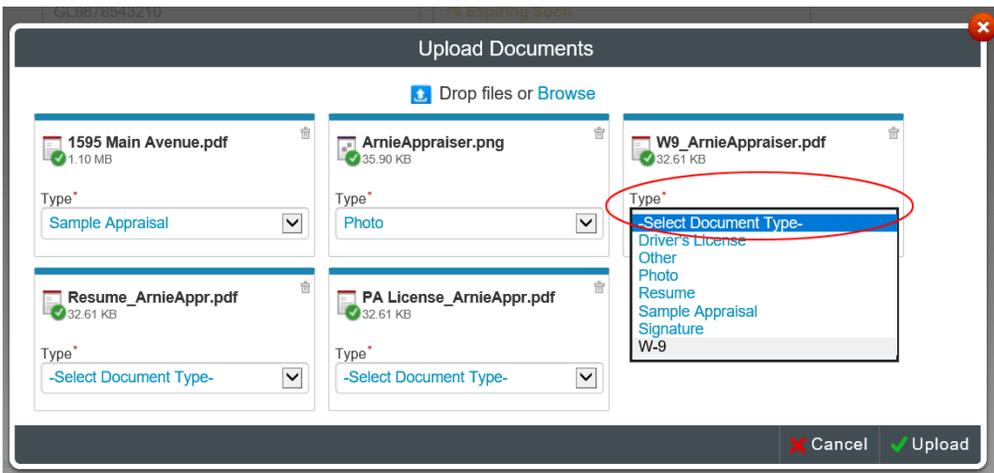
4. Click the **Upload** button.

5. Uploaded documents will be displayed in the **Additional Documents** table.

6. Roll over the Ellipsis ••• icon for a document record in the **Additional Documents** table to access the Actions menu. **Download** and **Upload Revision** actions are available for each document saved to the table.

   Clicking the Trash Can 🗑 icon will delete the selected document from the table.

Manage Coverage Area

You can add or update your Coverage Area by navigating to **Profile >> Coverage Area**.
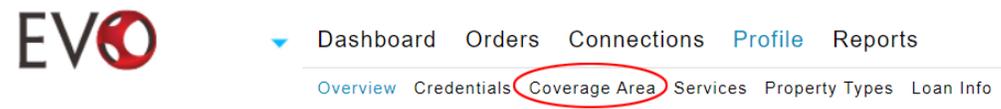
PLEASE NOTE: **Coverage Area can only be added for states where you are licensed**.

To add Coverage Area for a licensed state:

1. Click the **Add** button in the page header.

2. The **Add Coverage Area** window will open.
3. Select **Coverage Type**. Coverage Type can also be adjusted after a Coverage Area is saved to your Profile.

   - Primary (*default selection)*
   - Secondary
   - Tertiary
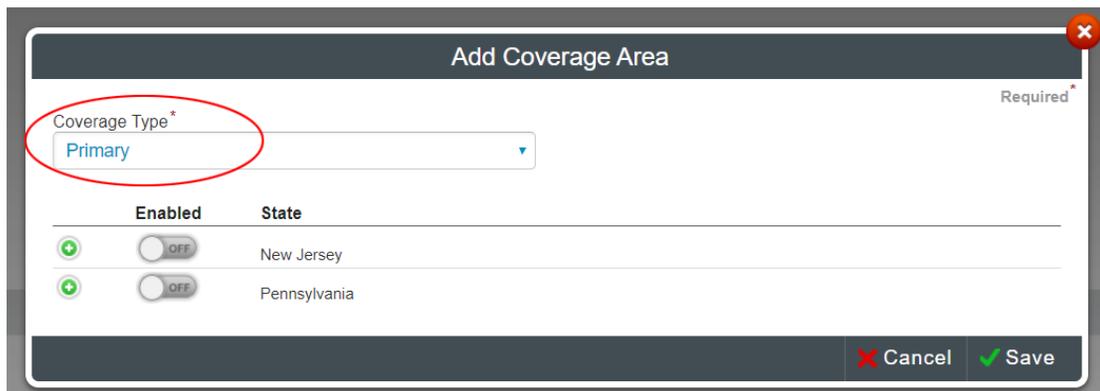
4. Click the ON/OFF toggle to enable a Coverage Area. Coverage can be enabled at the **State**, **County** or **ZIP Code** level.

   Click on the plus sign 🞤 icon for the selected State to expand to enable coverage at the County level.

   Click on the plus sign 🞤 icon for the selected County to expand to enable coverage at the ZIP Code level.
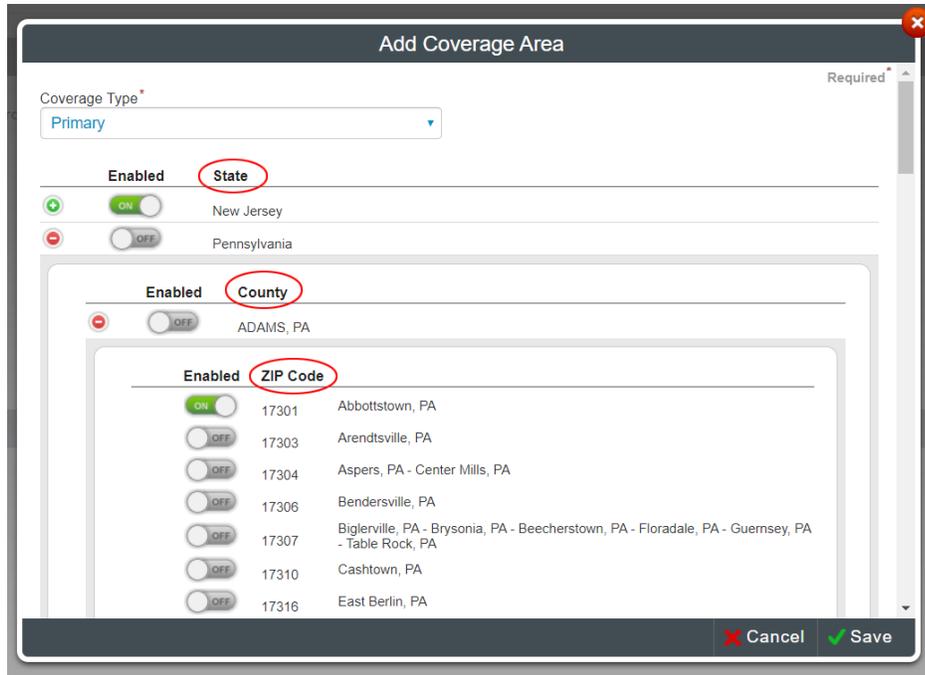
5. Click the **Save** button.

To change Coverage Type for Coverage Area:

1. Check the box adjacent to the selected Coverage Area(s) on the Manage Coverage Area page.

   Click on the plus sign ⊕ icon for the State to expand to select coverage at the County or ZIP Code levels.
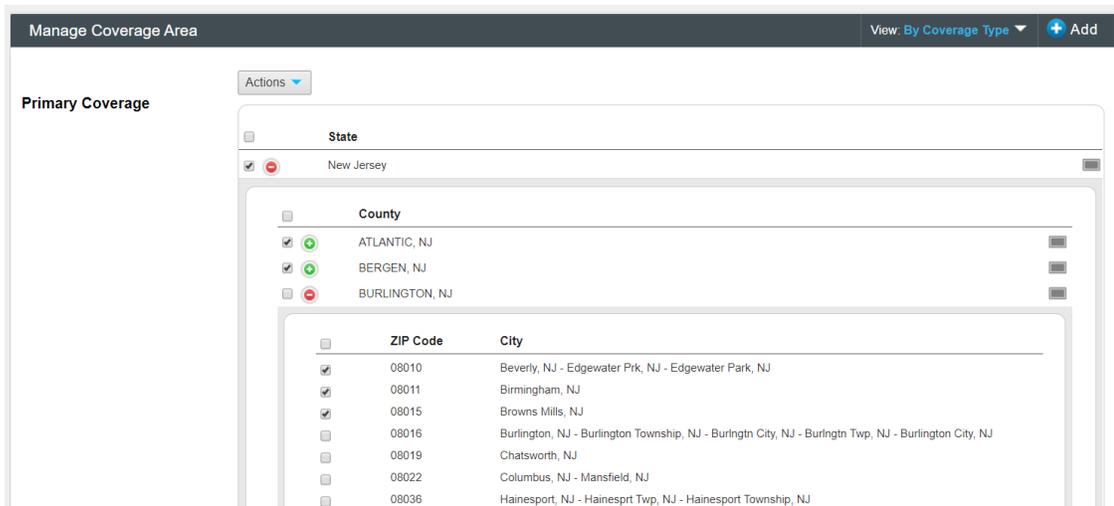
2. From the **Actions** menu, select *Set Primary*, *Set Secondary* or *Set Tertiary*.
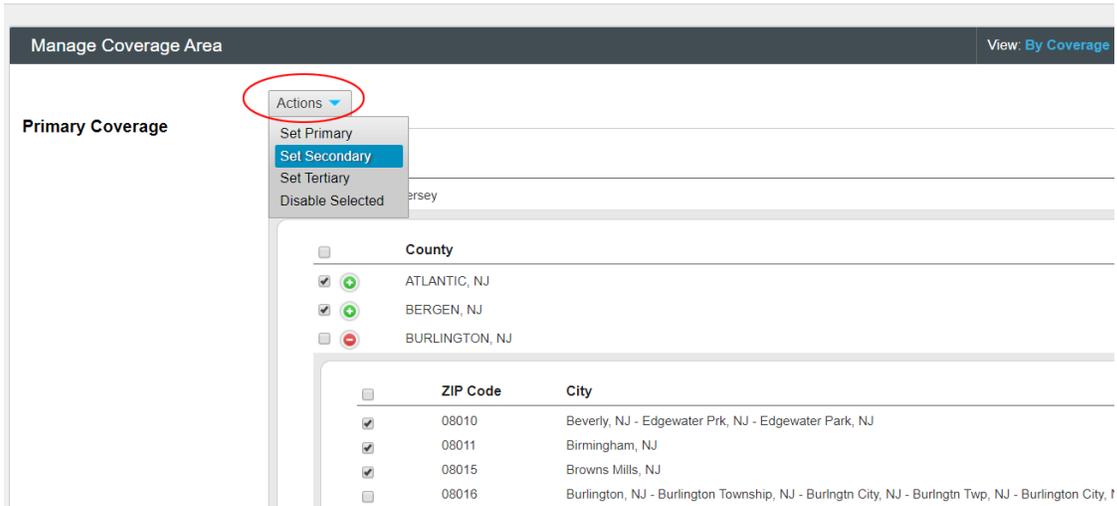

3. The **Set Coverage Type** window will open.

4. Click **Yes** to confirm updated Coverage Type for selected Coverage Area.

To disable Coverage Area:

1. Check the box adjacent to the selected Coverage Area(s).

2. From the **Actions** menu, select *Disable Selected*.
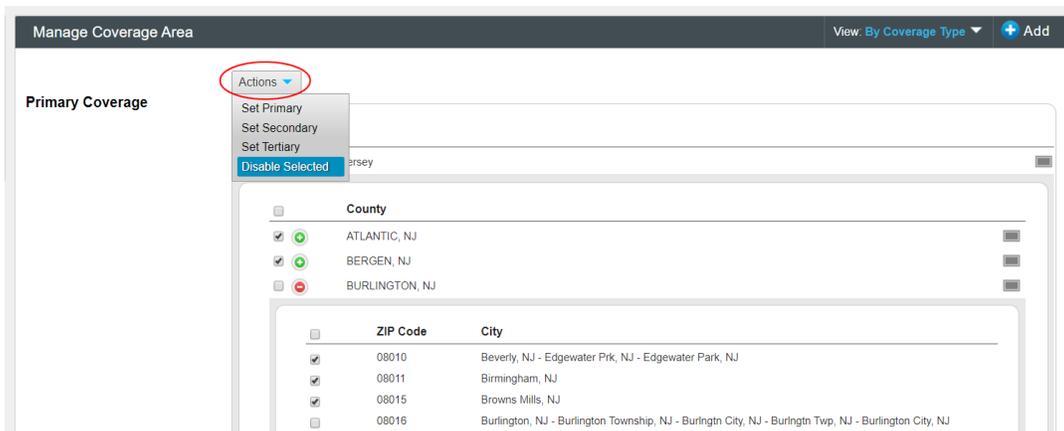
3. The **Disable Coverage Area** window will open.
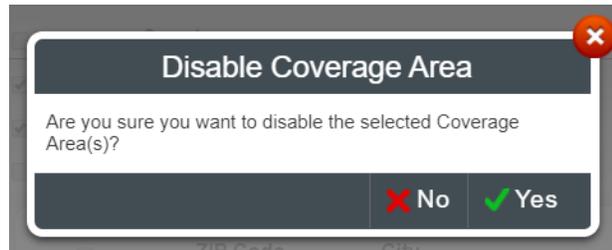
4. Click **Yes** to disable selected Coverage Area.

You can search for Coverage Area in the left navigation panel by:

- **State**
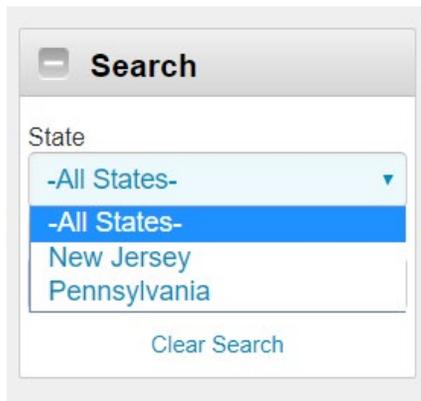
- **Coverage Type**
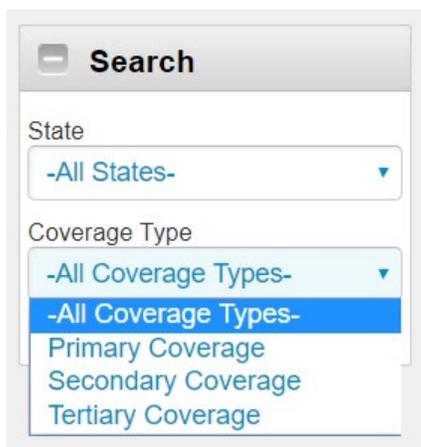
Coverage Area can be viewed:

- **By Coverage Type** (*default view*)

- **By State**

- **By County**

Manage Services

You can manage your Services and Fees by navigating to **Profile >> Services**.
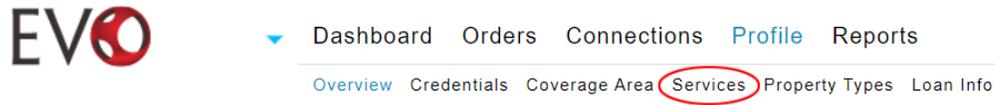
To enable Residential services, navigate to the **Residential** tab under the Manage Services header:

1. Click the ON/OFF toggle to enable a Service. The **Enable All** button can be clicked to enable all Residential Services.

2. Enter a Fee for **All Coverage** or click the Arrow ▼ icon to enter a different fee for **Primary**, **Secondary** and/or **Tertiary** coverage. (*Entering a Fee is not required.*)

3. Click the **Save** button in the page header or footer to save your changes.
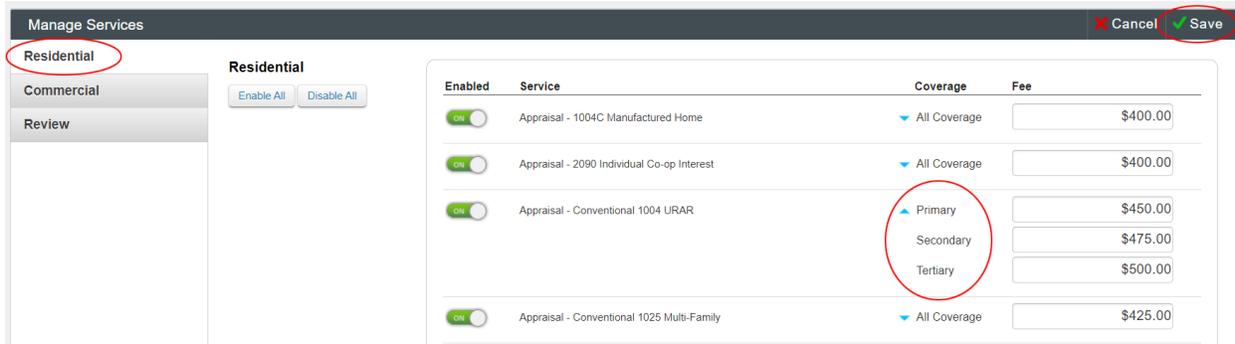
To enable Commercial services, navigate to the **Commercial** tab under the Manage Services header:

1. Click the ON/OFF toggle to enable a Service. The **Enable All** button can be clicked to enable all Commercial Services.

2. Enter a Fee for **All Coverage** or click the Arrow ▼ icon to enter a different fee for **Primary**, **Secondary** and/or **Tertiary** coverage. (*Entering a Fee is not required.*)

3. Click the **Save** button in the page header or footer to save your changes.
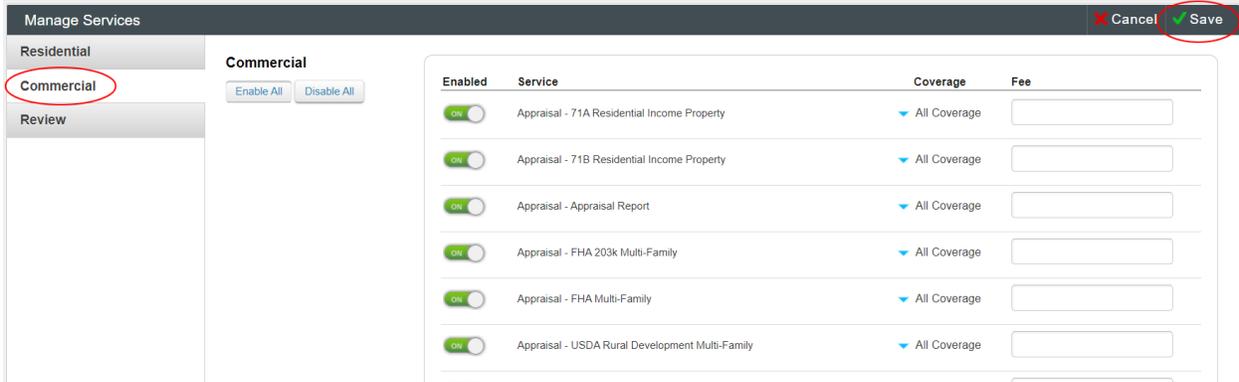
To enable Review services, navigate to the **Review** tab under the Manage Services header:

1. Click the ON/OFF toggle to enable a Review Service. The **Enable All** button can be clicked to enable all Residential Review Services or all Commercial Review Services.

2. Enter a Fee for **All Review Types** or click the Arrow ▼ icon to enter a different fee for **Standard** and/or **Technical** reviews. (*Entering a Fee is not required.*)

3. Click the **Save** button in the page header or footer to save your changes.
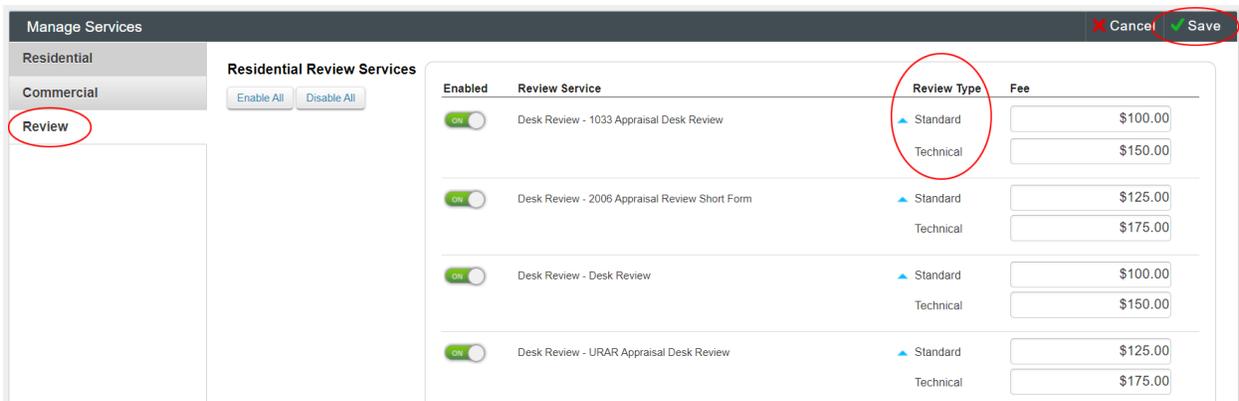
Manage Property Types

You can manage your Property Types by navigating to **Profile >> Property Types**.
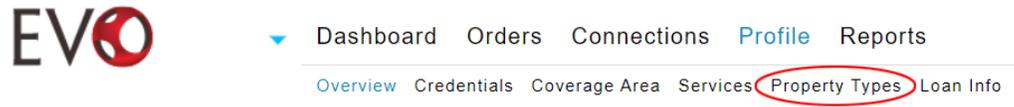
Make a selection from the **Type** drop down menu to jump to a particular Property Type category. This will filter your view to the selected Property Type:

- Agricultural
- Commercial
- Health Care
- Industrial
- Land
- Lodging and Hospitality

- Municipal/Institutional
- Office
- Recreational
- Residential
- Retail
- Special Purpose

To add a Property Type:

1. Click the ON/OFF toggle to enable the Property Type. The **Enable All** button can be clicked to enable all Property Types within a Property Type category.
2. Click the **Save** button in the page header or footer to save your changes.
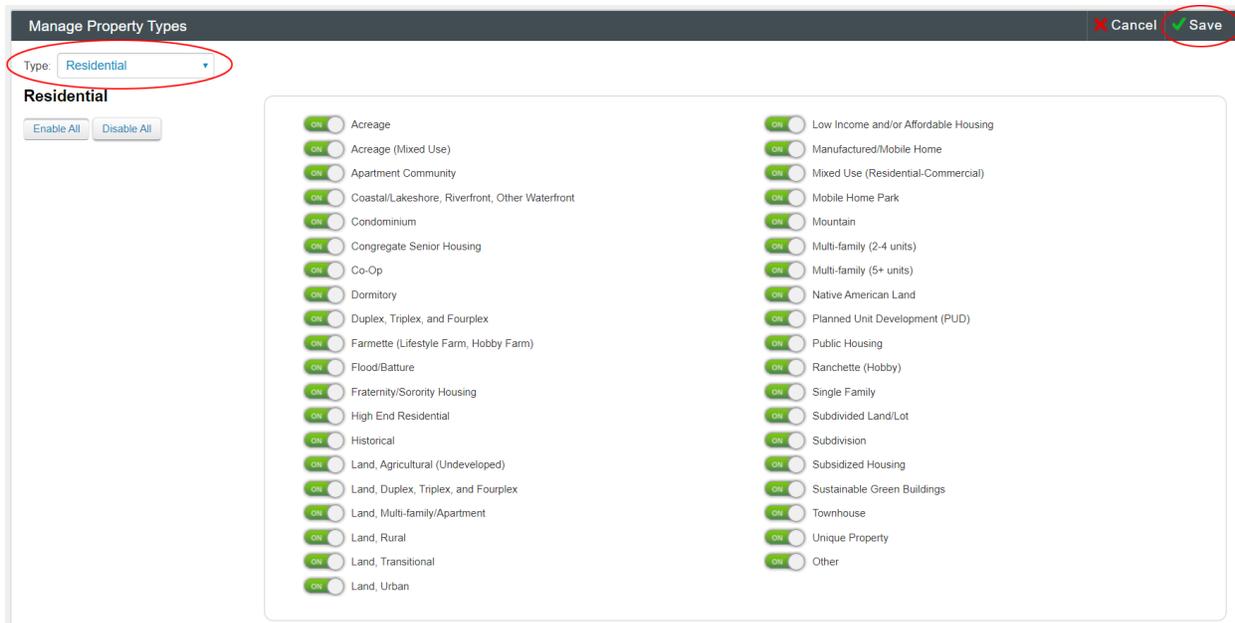
Manage Loan Types

You can manage your Loan Types by navigating to **Profile >> Loan Info**.
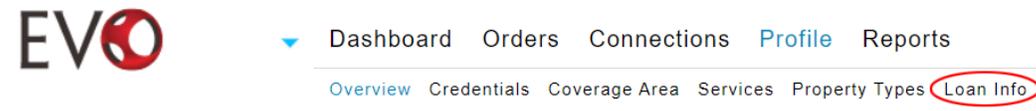
To add a Loan Type:

1. Click the ON/OFF toggle to enable the Loan Type. The **Enable All** button can be clicked to enable all Loan Types.

2. Click the **Save** button in the page header or footer to save your changes.
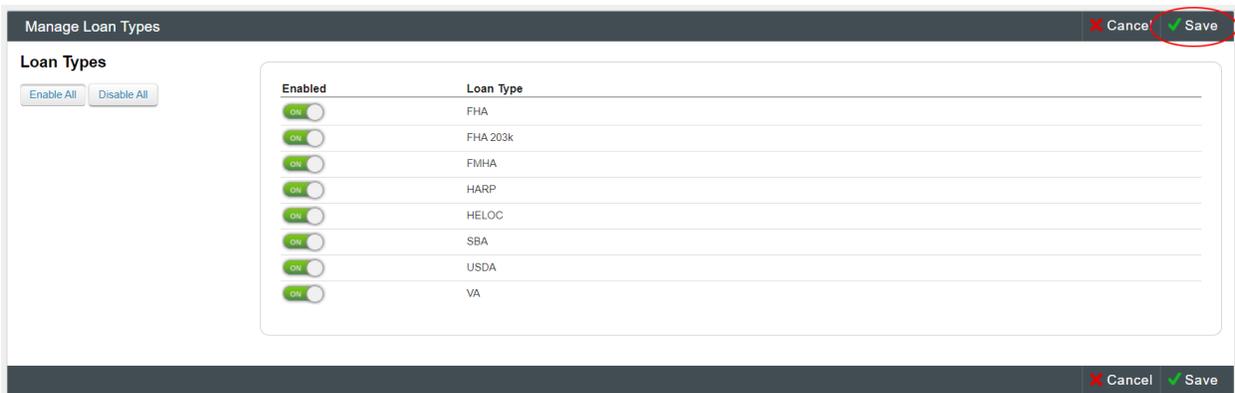
Updating Account Information

You can manage your Account Information by navigating to **User >> Account**.
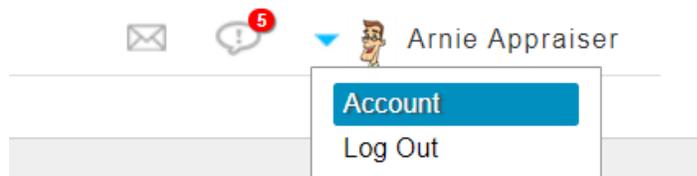
To update your User Information, navigate to the **User** tab under the Account header:

1. Click the **Edit** button in the page header or footer.

2. Make any necessary updates to your First Name, Last Name, Username, Time Zone or Title.

3. Click the **Save** button to save your changes.

To change your Password, navigate to the **Security** tab under the Account header:

1. Enter your **Current Password**.

2. Enter a **New Password**. (Roll over the Question Mark icon to view Password Requirements).

3. Re-enter the password to **Confirm New Password**.

4. Click the **Change Password** button.

To change your Security Questions, navigate to the **Security** tab under the Account header:

1. Click the Pencil ✏ icon adjacent to the Security Question you would like to update.

2. The **Edit Security Question** window will open.


3. Select a new Security Question from the **Question** drop down menu or **Create your own question**. If you create your own question, you will be prompted to enter the question in the **Configure Question** field.

4. Enter an **Answer**.

5. Enter your **Password**.

6. Click the **Update** button.

To configure your Notification Preferences, navigate to the **Preferences** tab under the Account header:

1. Click the ON/OFF toggle to disable a Notification Type. (*All Workflow Notification Types are enabled by default*).

2. PLEASE NOTE: If a Notification Type is disabled, you will no longer receive an email notification for the corresponding workflow action when it occurs.

3. Click the **Save** button in the page header or footer to save your changes.