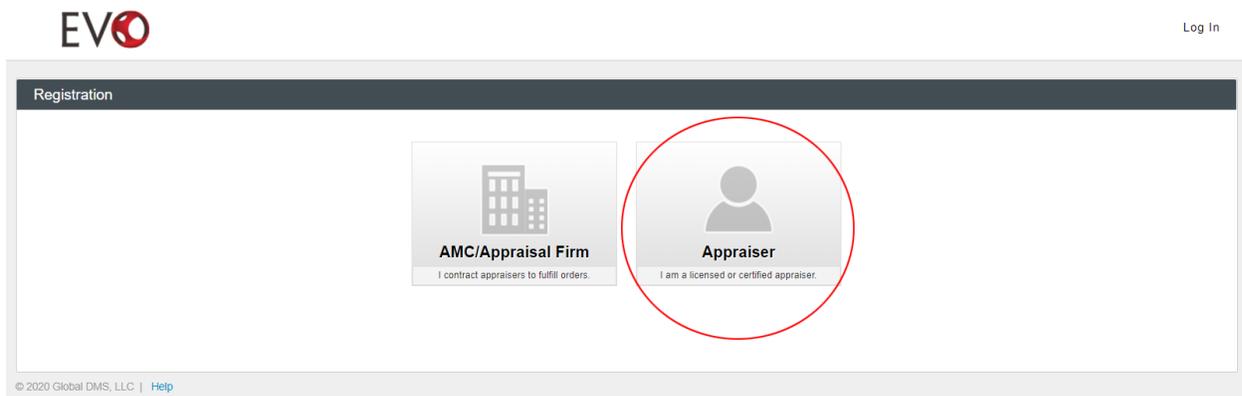


Joining the EVO Network

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*).



Username*

Password*

Remember Username

[Forgot Username | Forgot Password](#) [Vendor Registration](#)

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

- Acknowledge the Global DMS Software License Agreement

Global DMS, LLC Software License Agreement

BY CLICKING 'ACCEPT', SUBMITTING AN ORDER FOR USE OF SOFTWARE THAT IS REFERENCED IN THIS AGREEMENT, YOU AGREE TO THE TERMS OF THIS AGREEMENT. IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY AND ITS AFFILIATES. IN WHICH CASE "YOU" OR "YOUR" SHALL REFER TO SUCH ENTITY AND ITS AFFILIATES. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE WITH THIS AGREEMENT, DO NOT CLICK ANY ACCEPT BUTTON AND DO NOT USE THE SOFTWARE.

SOFTWARE LICENSE. Global DMS, LLC with offices at 1555 Bustard Road Suite 300 Lansdale, PA 19446 ("Global DMS") hereby grants You, and You accept subject to the terms and conditions of this Agreement, a nonexclusive right to use this Software commonly known as EVO-Commercial™ on a single computer located within the United States for purposes consistent with this Agreement (the "License"). You may be referred to hereinafter as the "User." The Software is intended for use by experienced real estate appraisers and those in the real estate valuation field. Use of the Software for other purposes is not authorized without the prior express written permission of Global DMS, and may require payment of additional fees. Except for the purposes indicated, raw data accessible through the Software may not be used, copied, distributed or commercialized in whole or in part in aggregated, bulk or raw form. Rights not expressly granted are reserved by Global DMS.

OTHER AGREEMENTS. You are using this Software for commercial appraisal data management services that you are performing for another person or party who is a customer of Global DMS ("Customer"). By accepting this Agreement, You agree to any other terms and conditions and agreements between Global DMS and the Customer that govern the restrictions of use of the Software.

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LOG-IN CREDENTIALS. Global DMS shall have the right to disable each Username and Password and deny access to the Software, with sufficient notice, upon User's violation of our security policy. Notice via phone, email, fax or regular mail shall be deemed sufficient notice.

OWNERSHIP AND TITLE: Title to the Software and all technology, including (without limitation) web sites or interface technology, in connection with the Software (excluding Third Party Technology), shall be the exclusive property of Global DMS, including but not limited to all ownership rights to patents, copyrights, trademarks and trade secrets in connection therewith. All customer data including clients, orders, appraisers and staff information is considered confidential and for use exclusively by the Customer. This data is private and cannot be used by Global DMS for any purpose without express written permission by the Customer, except that aggregate data may be used for statistical analysis by Global DMS.

REVERSE ENGINEERING. User shall not reverse engineer the Software and shall not allow the Software to be reverse engineered. In the event that this occurs the agreement shall be automatically terminated and Global DMS shall take legal action against the User in the state of Pennsylvania or elsewhere.

TRADE SECRETS. The Software contains Global DMS trade secrets. You agree not to decompile, reverse engineer, disassemble, or otherwise reduce the Software to human-perceivable form. You agree not to disable any functionality that limits the use of the Software or associated system. Nothing in this Agreement will entitle you to receive the source code of the Software, in whole or in part. Except as otherwise expressly provided in this Agreement, you may not modify, adapt, translate, rent, sublicense, assign, loan, resell for profit, publicly display or perform, grant access or use to any third party or entity, or distribute the Software or related materials or create derivative works based upon the Software.

GOVERNING LAW. The State laws of Pennsylvania govern this Agreement and venue for all claims or actions arising out of this Agreement shall be Pennsylvania or other venue as Global DMS may in its sole discretion decide is appropriate.

- Establish security questions

Security Questions Setup

To protect the security of your account, please answer the following questions: Required *

Question 1
-Select Question-

Answer*

Question 2
-Select Question-

Answer*

Question 3
-Select Question-

Answer*

- Enter a new password

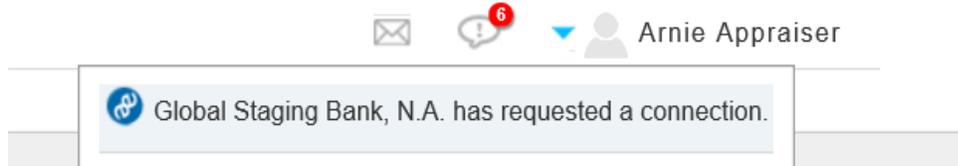
Password Setup

New Password* Required *

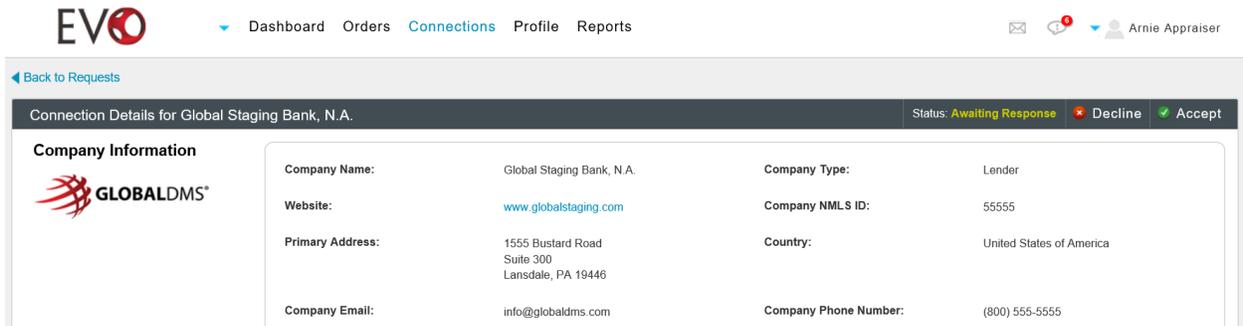
Confirm New Password*

Viewing Connection Requests

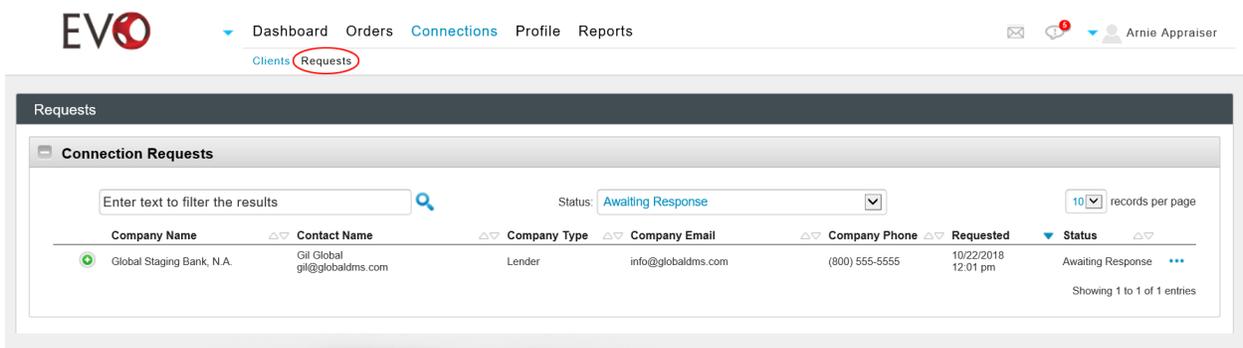
EVO connection requests must be accepted prior to receiving appraisal orders from a lender. An alert will be displayed in the top navigation menu if a connection request is pending.



- 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**.



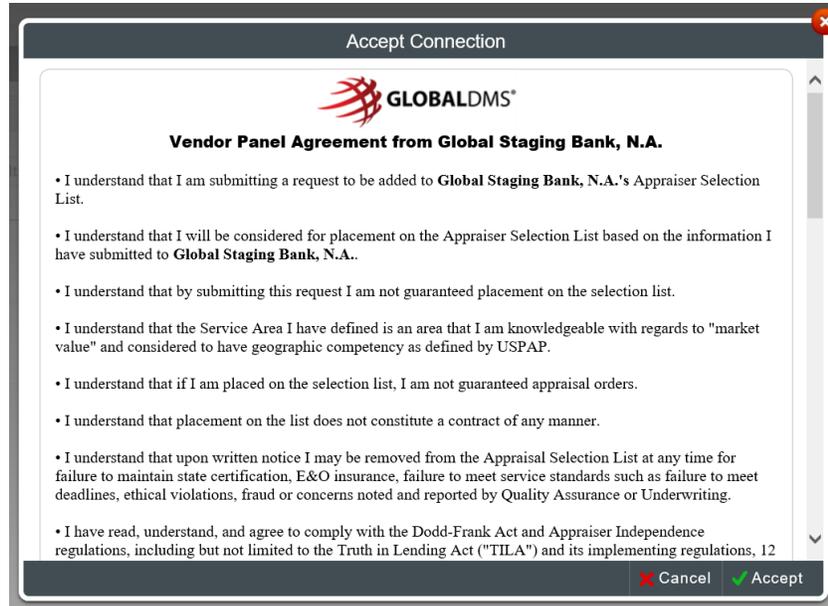
Accepting Connection Requests

To accept a pending connection request:

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



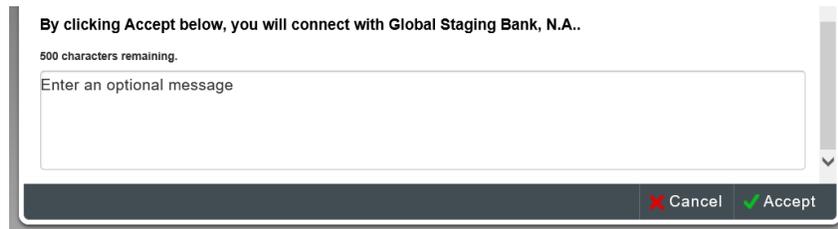
2. The **Accept Connection** window will open.



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 screenshot shows the EVOL dashboard with a navigation menu at the top. The menu items are: Dashboard, Orders, **Connections**, Profile, and Reports. Below the menu, there are icons for email, a notification bell with a red dot, and a user profile for 'Arnie Appraiser'. The 'Clients' link in the navigation menu is circled in red.

- 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.

This screenshot shows the 'Client Connections' table. The first row is for 'Global Staging Bank, N.A.'. To the right of this row is a plus sign icon. Below the table, a detailed view of the client record is shown, including a table of messages and a section for 'Connection Request Attachments'. One attachment, 'Signed Connection Agreement.pdf', is circled in red.

Date	Company	User	Message	Status
3/5/2020 11:01 am	Appraisals by Arnie	Arnie Appraiser		Accepted
3/5/2020 10:55 am	Global Staging Bank, N.A.	Vania Baez	Please respond ASAP.	Awaiting Response
3/5/2020 2:05 pm	Appraisals by Arnie	Arnie Appraiser		Registered
3/5/2020 2:03 pm	Global Staging Bank, N.A.	Vania Baez		Pending Registration

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

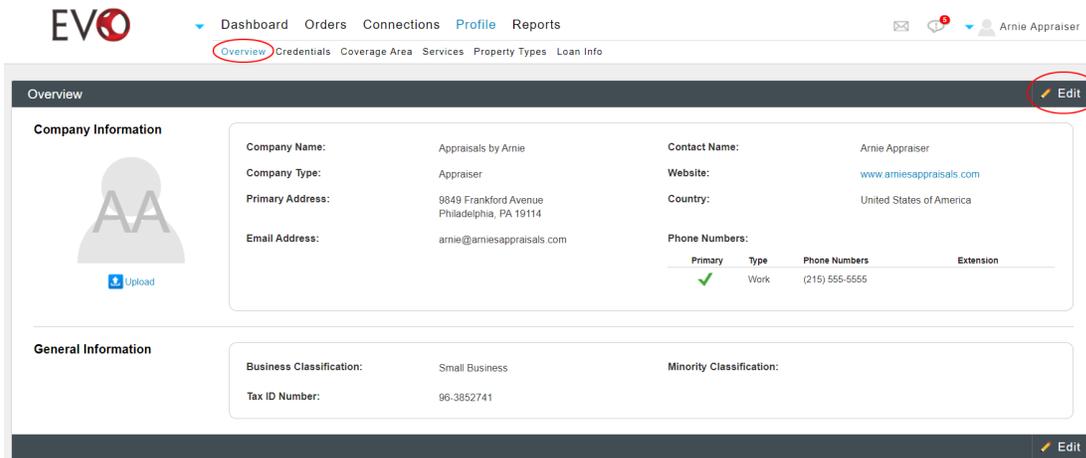
The screenshot shows the 'Client Detail' page for 'Global Staging Bank, N.A.'. It is divided into three main sections: 'Company Information', 'Contact Information', and 'Fees'. The 'Company Information' section includes details like company name, website, address, and phone number. The 'Contact Information' section includes contact name, title, email, and phone numbers. The 'Fees' section states that service fees will be determined by the client at assignment.

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.

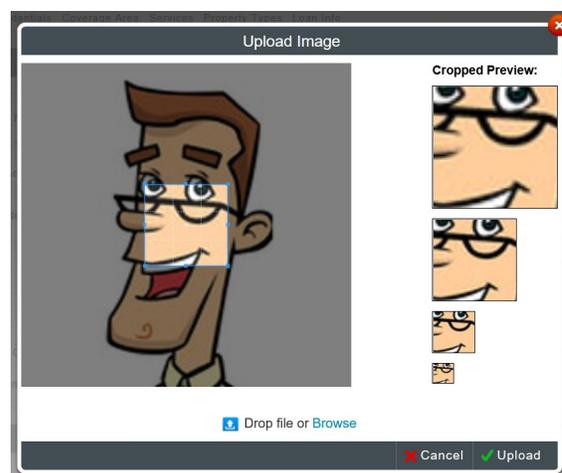


2. Make any necessary updates on the Edit Profile Overview page and remember to click the **Save** button to save your changes.



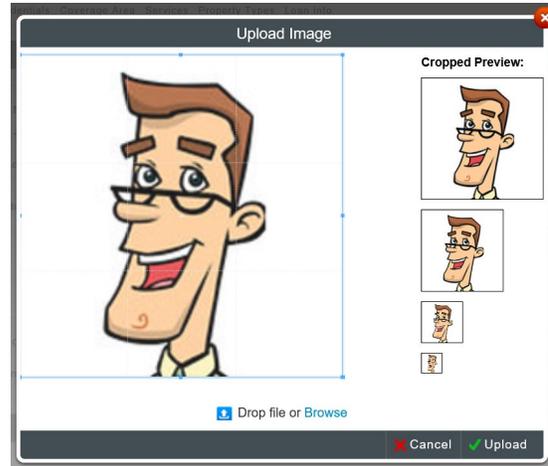
From the **Profile >> Overview** page, you can also upload a photo or company logo to your EVO Vendor Profile. To upload an image:

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.

EVO Dashboard Orders Connections **Profile** Reports Arnie Appraiser

Overview Credentials Coverage Area Services Property Types Loan Info

Overview Edit

Company Information



Company Name:	Appraisals by Arnie	Contact Name:	Arnie Appraiser								
Company Type:	Appraiser	Website:	www.arniesappraisals.com								
Primary Address:	9849 Frankford Avenue Philadelphia, PA 19114	Country:	United States of America								
Email Address:	vania+arnie@globaldms.com	Phone Numbers:									
		<table><thead><tr><th>Primary</th><th>Type</th><th>Phone Numbers</th><th>Extension</th></tr></thead><tbody><tr><td>✓</td><td>Work</td><td>(215) 555-5555</td><td></td></tr></tbody></table>	Primary	Type	Phone Numbers	Extension	✓	Work	(215) 555-5555		
Primary	Type	Phone Numbers	Extension								
✓	Work	(215) 555-5555									

General Information

Business Classification:	Small Business	Minority Classification:	
Tax ID Number:	96-3852741		

Edit

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.

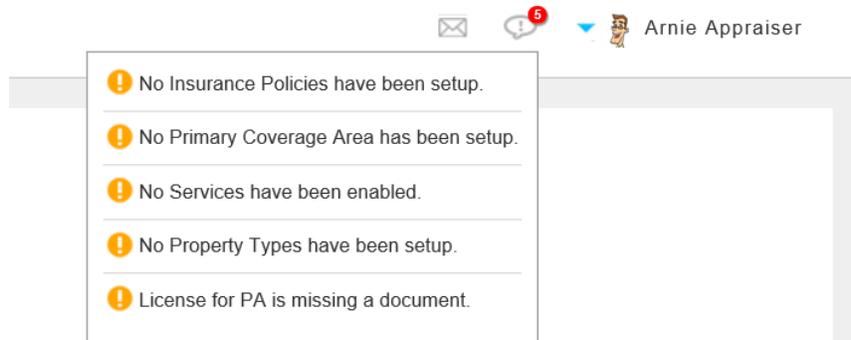
Completing the Vendor Profile

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.

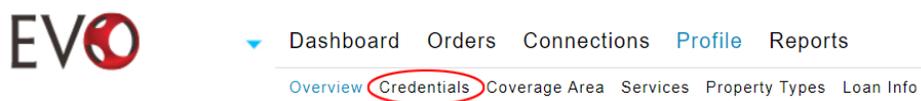
- Roll over the Alert  icon to view your alert messages.
- The number circled in red indicates the number of pending alerts.
- These alerts will display any Vendor Profile areas that have not yet been set up, but are required in order to be eligible for service assignment.

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:**

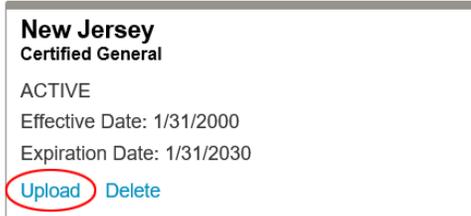


- Appraiser Licenses
- Appraiser Designations
- Experience
- Insurance Policies
- Background Checks
- Additional Documents

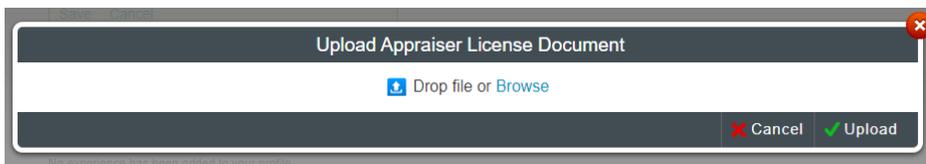
Appraiser Licenses

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.

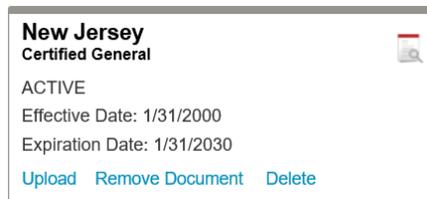


3. Click the **Upload** button.

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*).

Appraiser Licenses [+ Add](#)



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](#).

 License number match not found. Please verify license number against ASC.gov National Registry.

Add Appraiser License Required*

License State*

License Number*
 

 Drop file or [Browse](#)

[Cancel](#)

4. **Drop file or Browse** to upload an Appraiser License document.
5. Click the **Save** button.

Add Appraiser License Required*

License State*

License Number*
 

 **PA License Doc.pdf**
32.61 KB

[Save](#) [Cancel](#)

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.

Pennsylvania
Certified General 

ACTIVE
 Effective Date: 1/31/2000
 Expiration Date: 1/31/2030

[Upload](#) [Remove Document](#) [Delete](#)

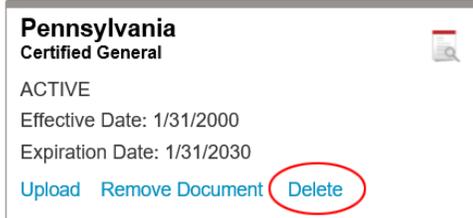
To remove an Appraiser License document, click the **Remove Document** link on the Appraiser License card.

Pennsylvania
Certified General 

ACTIVE
 Effective Date: 1/31/2000
 Expiration Date: 1/31/2030

[Upload](#) [Remove Document](#) [Delete](#)

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



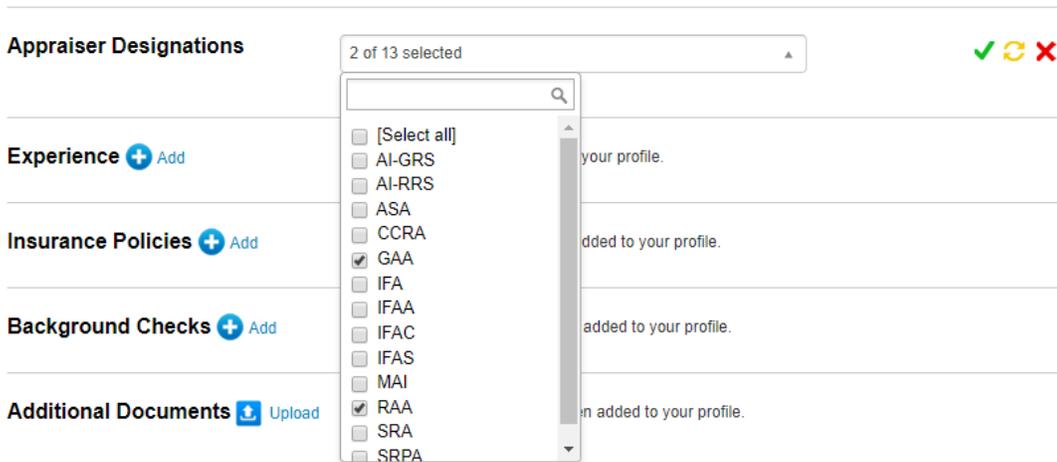
Appraiser Designations

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.

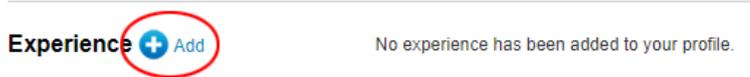


(Clicking the Reset  icon will clear your selections. Clicking the Cancel  icon will close out of the Appraiser Designation selection field.)

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.

The 'Add Experience' dialog box contains the following fields and values:

Field	Value
License*	Pennsylvania active
License Type	Required*
Experience	0
Year Issued*	

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

The 'Add Experience' dialog box contains the following fields and values:

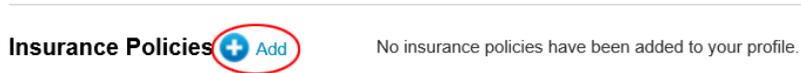
Field	Value
License*	Pennsylvania active
License Type	Certified General
Experience	30
Year Issued*	1990

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.

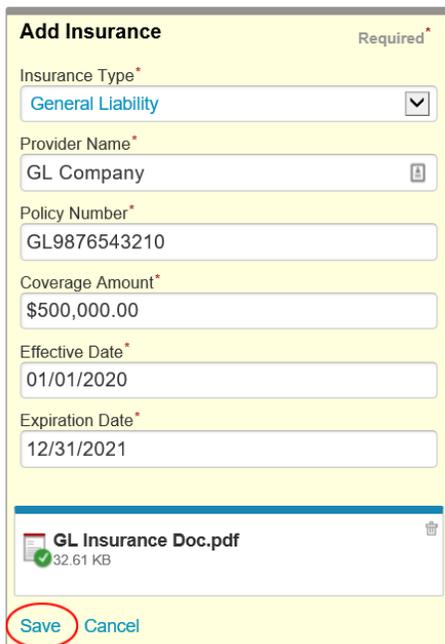
Insurance Policies

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.



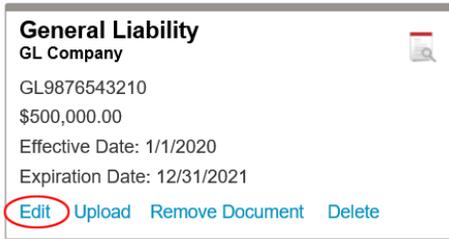
The screenshot shows the 'Add Insurance' form with the following fields and values:

- Insurance Type***: General Liability (dropdown menu)
- Provider Name***: GL Company
- Policy Number***: GL9876543210
- Coverage Amount***: \$500,000.00
- Effective Date***: 01/01/2020
- Expiration Date***: 12/31/2021

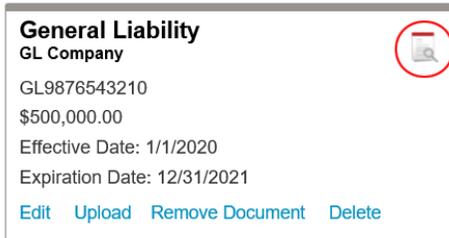
At the bottom, there is a file upload section showing 'GL Insurance Doc.pdf' (32.61 KB) with a green checkmark. Below the file upload section, the 'Save' button is circled in red, and the 'Cancel' button is also visible.

9. Repeat these steps to add additional Insurance Policies.

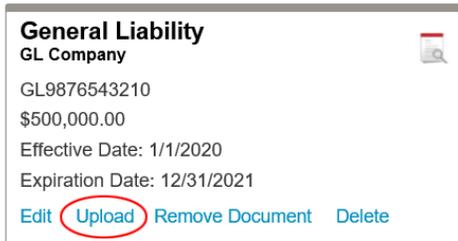
To edit an Insurance Policy, click **Edit** on the Insurance Policy card.



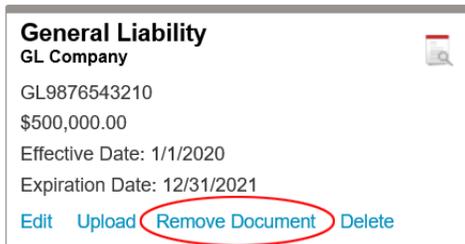
To download and view an Insurance Policy document, click the Document Preview  icon on the Insurance Policy card.



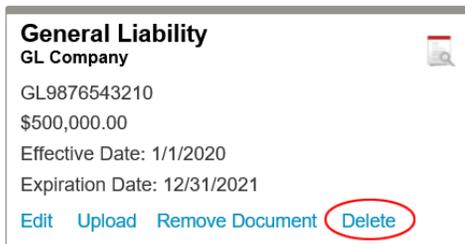
To upload or revise an Insurance Policy document, click **Upload** on the Insurance Policy card.



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



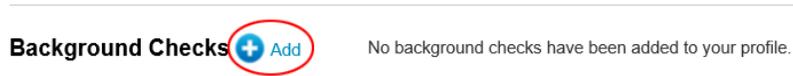
To delete an Insurance Policy, click **Delete** on the Insurance Policy card.



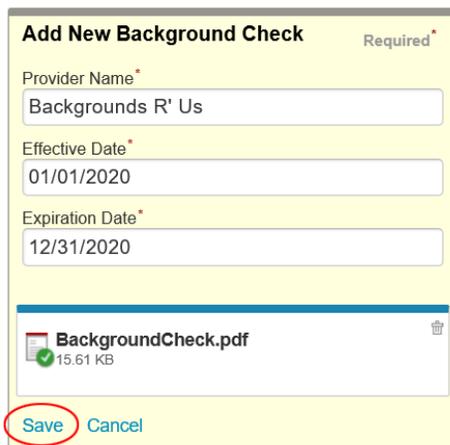
Background Checks

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*).

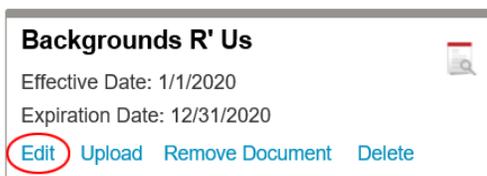


2. In the **Add New Background Check** card, enter the **Provider Name**.
3. Select the **Effective Date** from the date picker calendar (*if a future date is entered, the Background Check will not be active until the Effective Date*).
4. Select the **Expiration Date** from the date picker calendar.
5. **Drop file or Browse** to upload a Background Check document. **A file upload is required.**
6. Click the **Save** button.

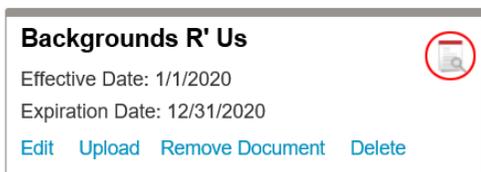
A form titled "Add New Background Check" with a "Required" asterisk. It contains three input fields: "Provider Name" with the value "Backgrounds R' Us", "Effective Date" with the value "01/01/2020", and "Expiration Date" with the value "12/31/2020". Below the fields is a file upload section showing a green checkmark, a trash icon, and the filename "BackgroundCheck.pdf" with a size of "15.61 KB". At the bottom of the form are two buttons: "Save" (circled in red) and "Cancel".

7. Repeat these steps to add additional Background Checks.

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

A card titled "Backgrounds R' Us" with a trash icon in the top right corner. It displays "Effective Date: 1/1/2020" and "Expiration Date: 12/31/2020". At the bottom of the card are four buttons: "Edit" (circled in red), "Upload", "Remove Document", and "Delete".

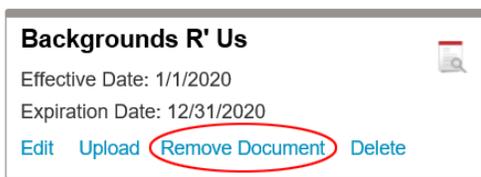
To download and view a Background Check document, click the Document Preview  icon on the Background Check card.



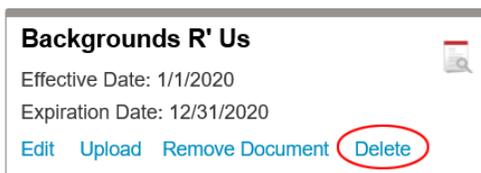
To upload or revise a Background Check document, click **Upload** on the Background Check card.



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.



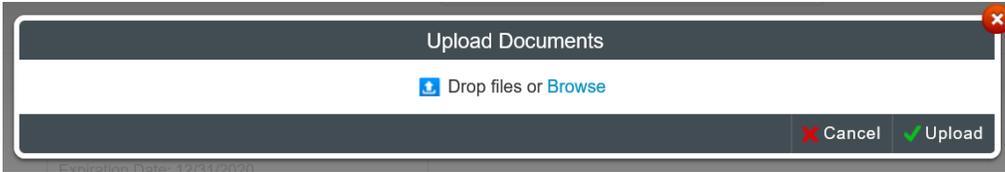
Additional Documents

To upload Additional Documents to your Vendor Profile:

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

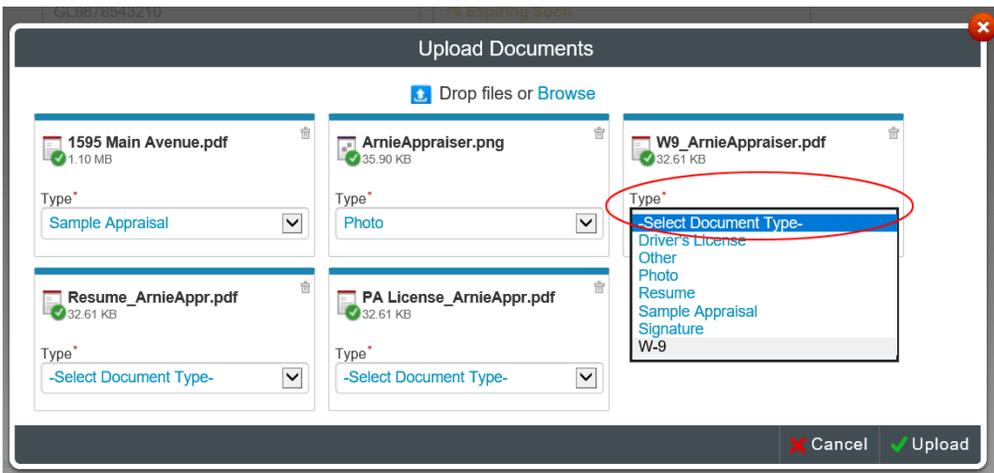


2. **Drop file or Browse** to upload document(s) in the **Upload Documents** window. (*One or more documents can be dragged and dropped into the window at a time.*)



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.

Additional Documents Upload		Name	Type	Uploaded Date	Uploaded By	
	1595 Main Avenue.pdf	1595 Main Avenue.pdf	Sample Appraisal	3/5/2020 6:41 pm	Arnie Appraiser	Download Upload Revision
	ArnieAppraiser.png	ArnieAppraiser.png	Photo	3/5/2020 6:41 pm	Arnie Appraiser	...
	PA License_ArnieAppr.pdf	PA License_ArnieAppr.pdf	Driver's License	3/5/2020 6:41 pm	Arnie Appraiser	...
	Resume_ArnieAppr.pdf	Resume_ArnieAppr.pdf	Resume	3/5/2020 6:41 pm	Arnie Appraiser	...
	W9_ArnieAppraiser.pdf	W9_ArnieAppraiser.pdf	W-9	3/5/2020 6:41 pm	Arnie Appraiser	...

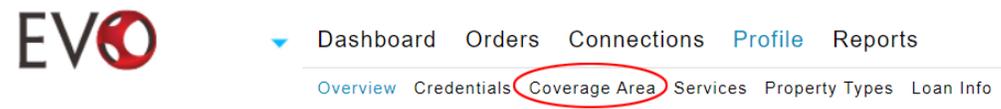
Showing 1 to 5 of 5 entries

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**.



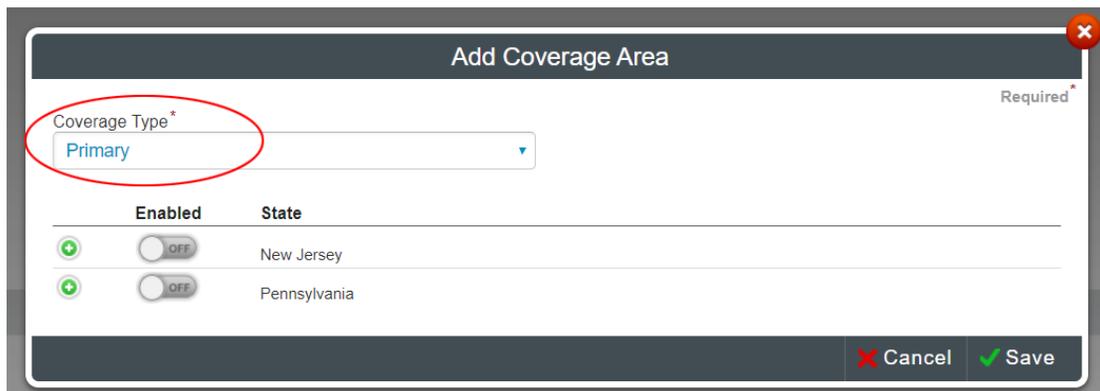
PLEASE NOTE: Coverage Area can only be added for states where you are licensed.

To add Coverage Area for a licensed state:

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



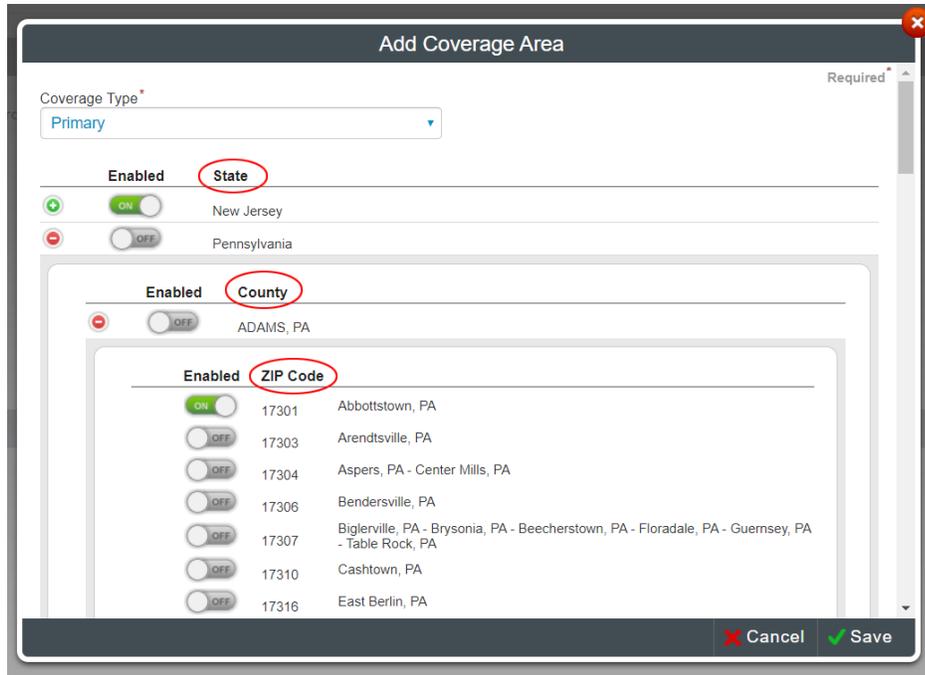
2. The **Add Coverage Area** window will open.
3. Select **Coverage Type**. Coverage Type can also be adjusted after a Coverage Area is saved to your Profile.
 - Primary (*default selection*)
 - Secondary
 - Tertiary



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.

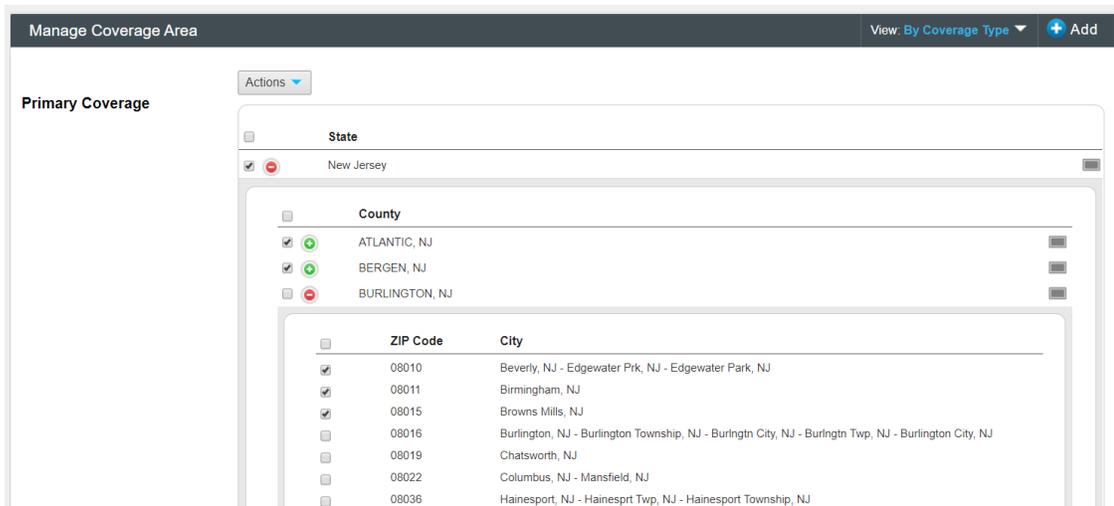


5. Click the **Save** button.

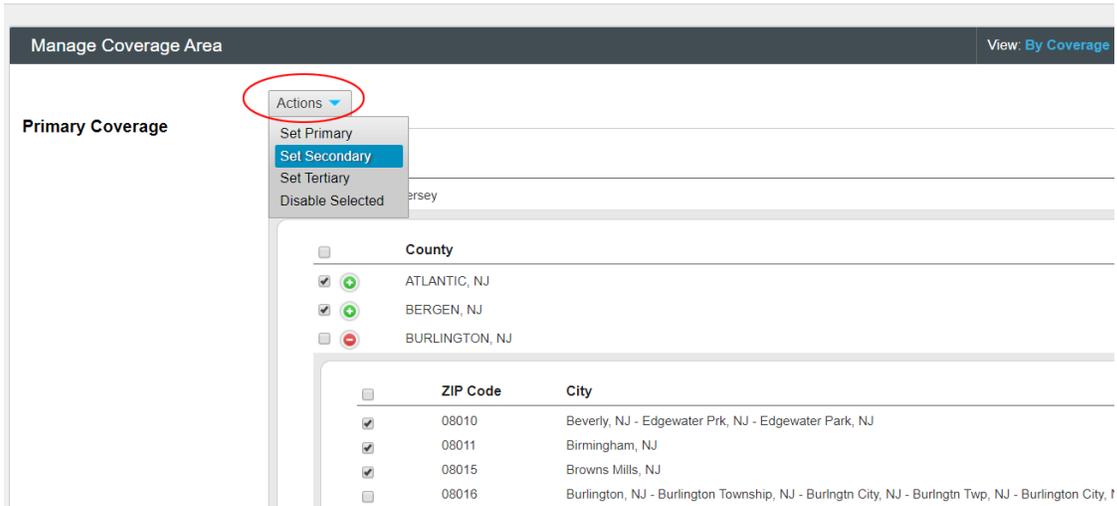
To change Coverage Type for Coverage Area:

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*.



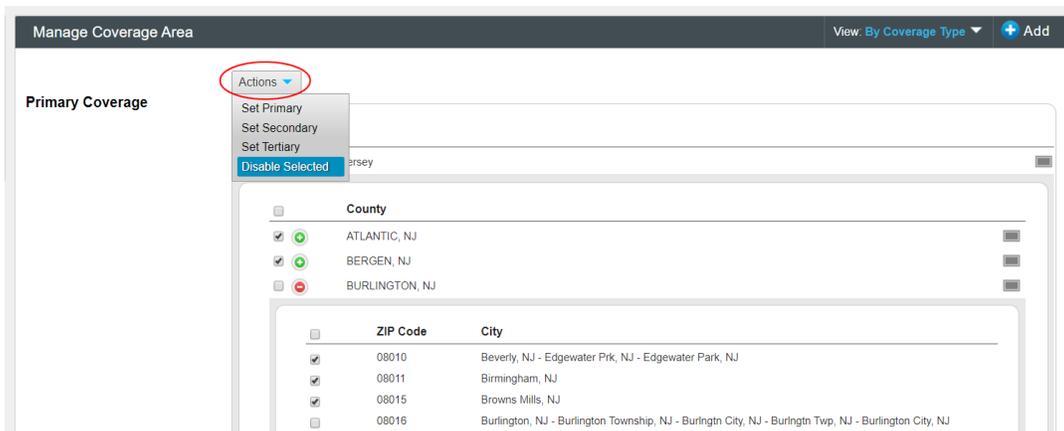
3. The **Set Coverage Type** window will open.



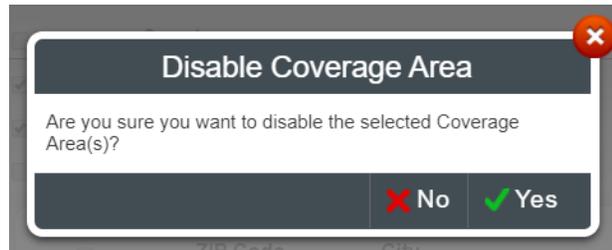
4. Click **Yes** to confirm updated Coverage Type for selected Coverage Area.

To disable Coverage Area:

1. Check the box adjacent to the selected Coverage Area(s).
2. From the **Actions** menu, select *Disable Selected*.



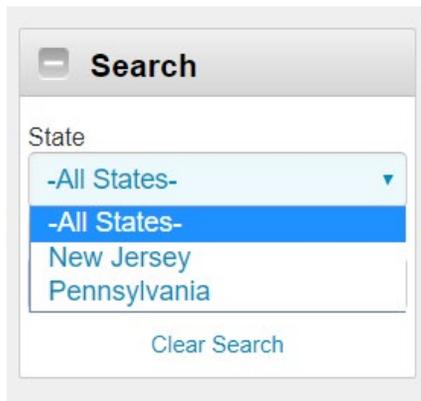
3. The **Disable Coverage Area** window will open.



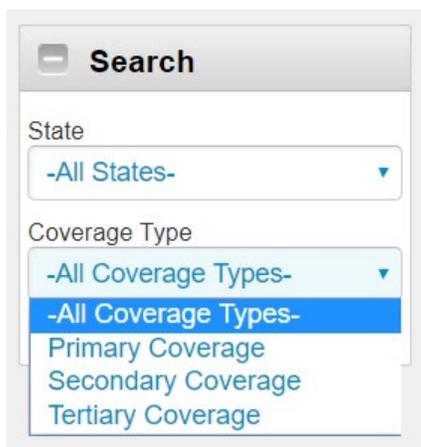
4. Click **Yes** to disable selected Coverage Area.

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)**

Manage Coverage Area View: By Coverage Type ▾ + Add

Primary Coverage

Actions ▾

State
<input type="checkbox"/> New Jersey
<input checked="" type="checkbox"/> Pennsylvania

Secondary Coverage

State
<input checked="" type="checkbox"/> New Jersey

View: By Coverage Type ▾ + Add

- **By State**

Manage Coverage Area View: By State ▾ + Add

Coverage Areas

Actions ▾

State	Coverage Type
<input checked="" type="checkbox"/> New Jersey	P S
<input checked="" type="checkbox"/> Pennsylvania	P

View: By State ▾ + Add

- **By County**

Manage Coverage Area View: By County ▾ + Add

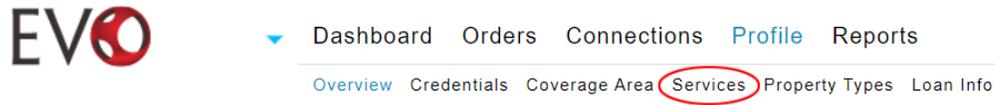
Coverage Areas

Actions ▾

County	Coverage Type
<input checked="" type="checkbox"/> ATLANTIC, NJ	S
<input checked="" type="checkbox"/> BERGEN, NJ	S
<input checked="" type="checkbox"/> BURLINGTON, NJ	P
<input checked="" type="checkbox"/> CAMDEN, NJ	P
<input checked="" type="checkbox"/> CAPE MAY, NJ	P
<input checked="" type="checkbox"/> CUMBERLAND, NJ	P
<input checked="" type="checkbox"/> ESSEX, NJ	P
<input checked="" type="checkbox"/> GLOUCESTER, NJ	P
<input checked="" type="checkbox"/> HUDSON, NJ	P
<input checked="" type="checkbox"/> HUNTERDON, NJ	P
<input checked="" type="checkbox"/> MERCER, NJ	P

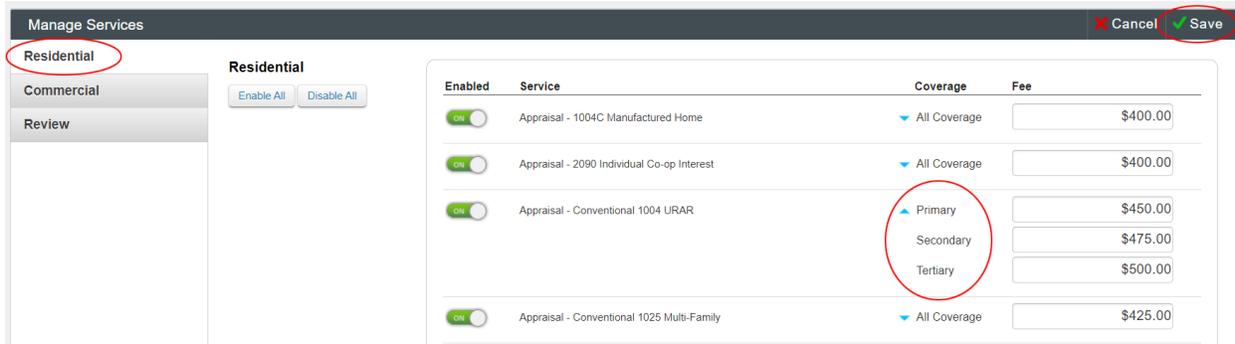
Manage Services

You can manage your Services and Fees by navigating to **Profile >> Services**.



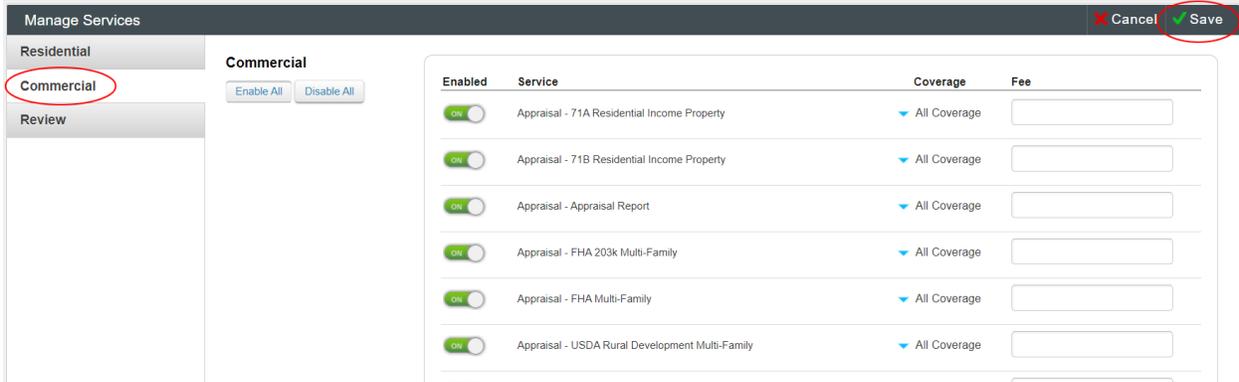
To enable Residential services, navigate to the **Residential** tab under the Manage Services header:

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.



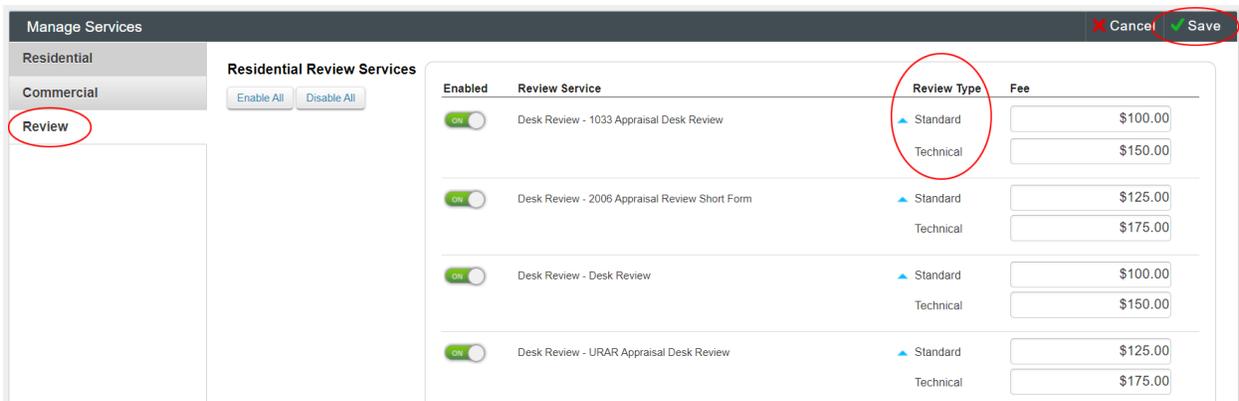
To enable Commercial services, navigate to the **Commercial** tab under the Manage Services header:

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.



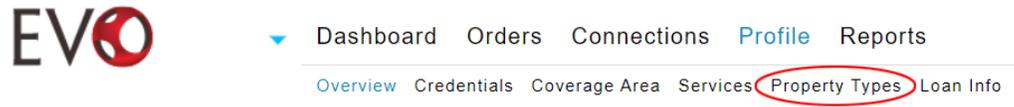
To enable Review services, navigate to the **Review** tab under the Manage Services header:

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**.

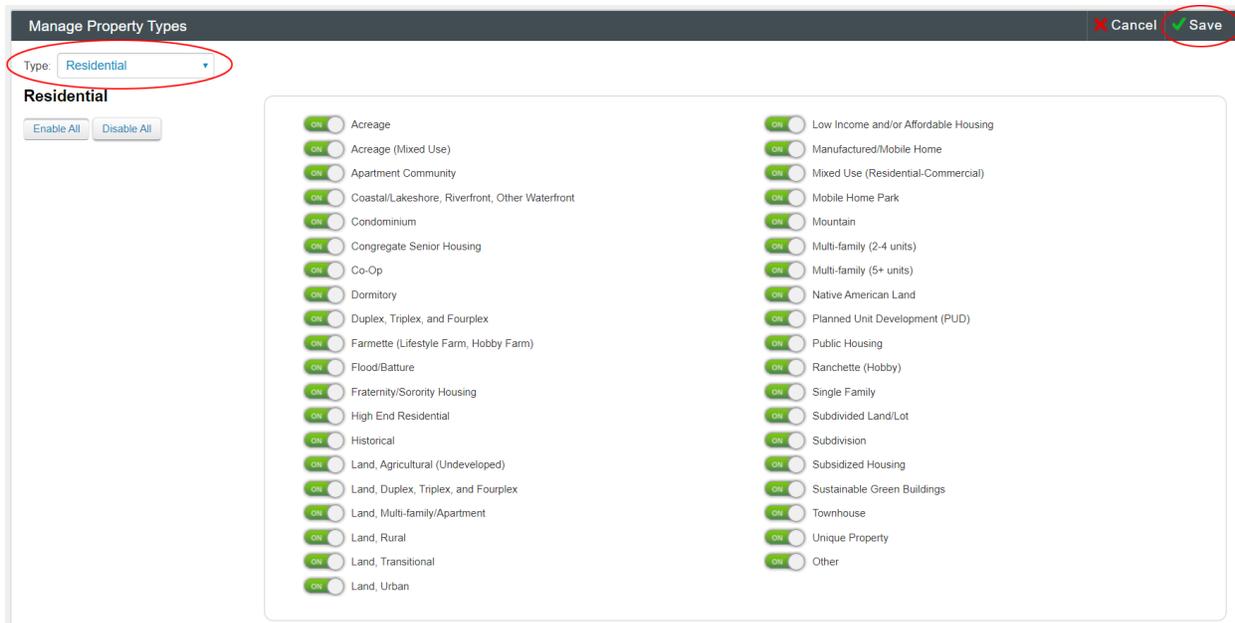


Make a selection from the **Type** drop down menu to jump to a particular Property Type category. This will filter your view to the selected Property Type:

- Agricultural
- Commercial
- Health Care
- Industrial
- Land
- Lodging and Hospitality
- Municipal/Institutional
- Office
- Recreational
- Residential
- Retail
- Special Purpose

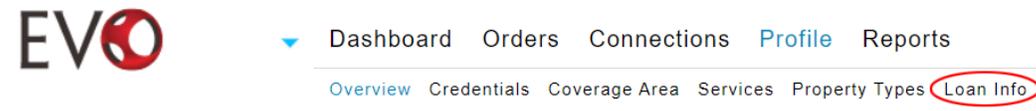
To add a Property Type:

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.



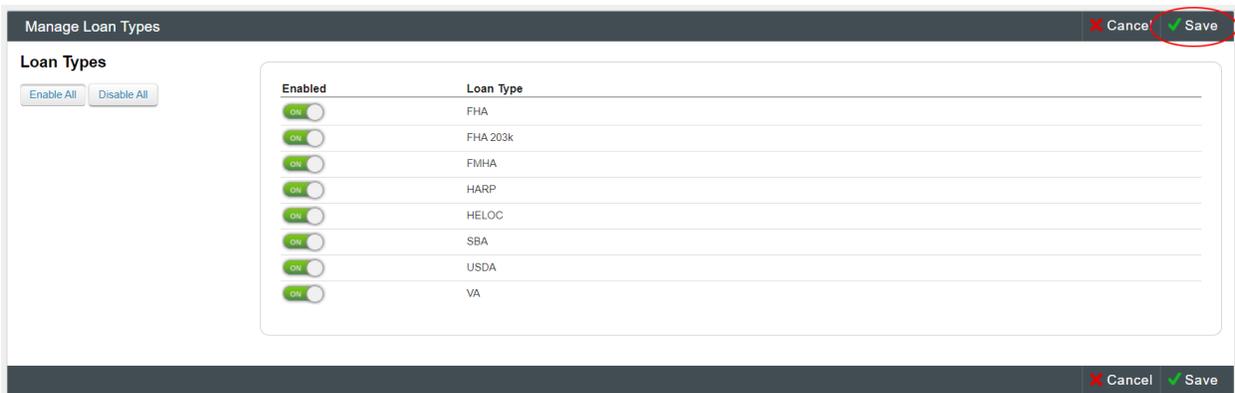
Manage Loan Types

You can manage your Loan Types by navigating to **Profile >> Loan Info**.



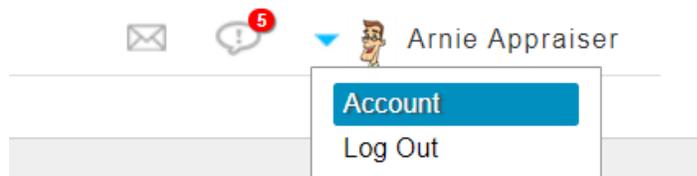
To add a Loan Type:

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.

Account Cancel Reset **Save**

User Information

First Name*
Arnie

Last Name*
Appraiser

Username*
arnie@arniesappraisals.com

Time Zone*
(GMT-05:00) Eastern Time

Cancel Reset **Save**

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.

Account

User

Security

Preferences

Credentials

Change Password

Current Password*

New Password* ?

Confirm New Password*

Change Password

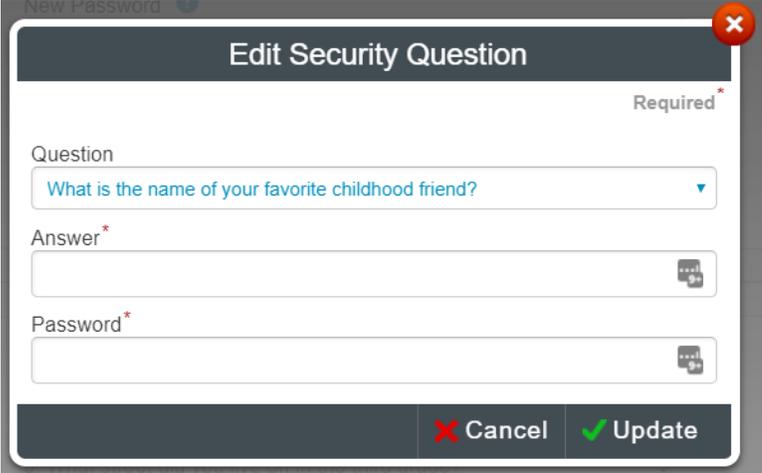
To change your Security Questions, navigate to the **Security** tab under the Account header:

Security Questions

1. What is the name of your favorite childhood friend? 
2. What is the middle name of your oldest child? 
3. What street did you live on in the third grade? 

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

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

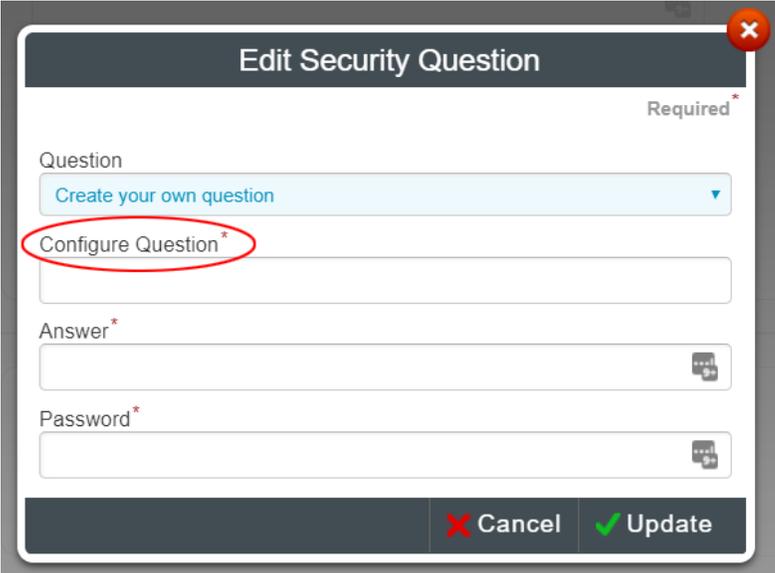


The screenshot shows a window titled "Edit Security Question" with a close button in the top right corner. The window contains a form with the following fields:

- Question**: A dropdown menu with the selected option "What is the name of your favorite childhood friend?".
- Answer ***: A text input field.
- Password ***: A password input field with a strength indicator icon.

At the bottom of the window, there are two buttons: "Cancel" (with a red X icon) and "Update" (with a green checkmark icon).

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.



The screenshot shows the same "Edit Security Question" window. In this view, the "Question" dropdown menu is set to "Create your own question". Below this dropdown, the "Configure Question *" field is circled in red. The "Answer *" and "Password *" fields remain the same. The "Cancel" and "Update" buttons are still present at the bottom.

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.

