

# A LA MODE, INC. TRAINING

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# Why?



Plaza will be enhancing our appraisal process to better serve our customers. Some of the benefits you'll see from our transition to a la mode from Real EC are:

## **The New Order Form**

- ✓ Is shorter and easier
- ✓ Provides an interactive Google Earth map
- ✓ Provides product validation to ensure ordering accuracy
- ✓ Displays the appraisal fee

## **Managing Orders**

- ✓ Easier search option
- ✓ Order information is quick and accessible
- ✓ Duplicating an order has never been easier



# Ordering an Appraisal

1. Logon to Plaza Home page  
[www.plazahomemortgage.com](http://www.plazahomemortgage.com)
2. Click on **Order an Appraisal** and a pop-up window will appear with the a la mode order form.

The screenshot displays the Plaza Home mortgage website interface. On the left, a dark blue navigation menu contains the following items:

- Rates**
  - Today's Rates
  - Past Rate Sheets
  - Lock Policies
  - Subscribe to E-Rates and Announcements
  - Branch Approval Map
- Submit/Price Your Loan**
  - Log in to PULSE to Submit/Price
  - Order an Appraisal (indicated by a red arrow)
  - a la mode Appraisal Order Search (indicated by a red arrow)
  - RealEc Appraisal Order Search (indicated by a red arrow)
  - FHA Case Number Request

The main content area features the **PULSE** logo, with the tagline "PRICING & UNDERWRITING LOAN SCENARIO ENGINE". Below the logo is a login form with fields for "Company ID:", "User Name:", and "Password:". A descriptive paragraph follows: "Whether you're pricing a loan scenario, looking for answers on program eligibility, re-loan, or managing your pipeline, PULSE makes it easier for you to do business with PULSE login information please contact your Account Executive. If you need further can be reached at [pulsesupport@plazahomemortgage.com](mailto:pulsesupport@plazahomemortgage.com) or 888-846-9498. Please digit Plaza Client ID in your help request."

At the bottom of the page, a banner for "PLAZA HOME" is visible, featuring a house icon and a photograph of people.

# a la mode Order Form

**PLAZA HOME MORTGAGE** Orders Profile

### New Appraisal Order

Fields with red asterisks (\*) next to them are required. However, please fill out as much information as possible. Doing so will eliminate delays caused by us having to contact you for additional information.

#### Contact and Access Information

Occupancy: (None Selected) [v]  
Borrower: [ ] Home  
Co-Borrower: [ ] Home  
Owner: [ ] Home  
Occupant: [ ] Home  
Agent: [ ] Home  
Other: [ ] Home  
Appointment Contact: (None Selected) [v]

Additional Notification Recipients  
Enter additional e-mail addresses to receive notifications for this order

Additional Comments or Instructions to Vendor

#### Property Information

Address \* [ ] Prop Type: (None Selected) [v]  
City \* [ ]  
State \* (None Selected) [v]  
Zip Code \* [ ]

#### Assignment Information

Form/Type \* (None Selected) [v]  
Due Date \* [ ]  Loan # or Lender Case # \* [ ]  
Loan Type \* (None Selected) [v] File # [ ]  
Loan Purpose \* (None Selected) [v] Estimated Value \* [ ]  
Ordered By [ ] FHA # [ ]

#### Lender Information

Lender Name: Plaza Home Mortgage

# a la mode Order Form

The screenshot shows the 'New Appraisal Order' form in the Mercury Network. The form is divided into several sections: 'Assignment Information', 'Payment Information', 'Property Information', and 'Contact and Access Information'. A 'Property Map' is visible on the right. An 'Attach Document' dialog box is open, showing a list of document types with 'Tax Document' selected. The form includes fields for Due Date, Other Ref #, Loan Type, Loan Purpose, Ordered By, Lender, Client Group, Disclosure Date, Address, City, State, Zip Code, First Name, Last Name, Street Address, City, State, Zip, E-mail, Card Number, and Exp. Month/Year. There are also buttons for 'Back' and 'Finish'.

**Test Orders II | Mercury Network** Help | Terms of Use | Sign Out

**PLAZA HOME MORTGAGE** Orders Profile

Cancel

**New Appraisal Order** Back Finish

**Property Map** Automatic

**Confirm Your Order**  
Please review the details of your order. If you need to make changes, click 'Back'.

**Assignment Information**

Due Date: 3/15/2013  
Other Ref #:   
Loan Type: Conventional  
Loan Purpose: Purchase  
Ordered By:   
Lender: Plaza Home Mortgage  
Client Group:   
Disclosure Date:   
Property Information  
Address: 5090 San Diego Ave  
City: San Diego  
State: CA  
Zip Code: 92122  
Contact and Access Information  
Occupancy:   
Borrower: Joe Borrero  
Co-Borrower:   
Owner:   
Occupant:   
Agent:   
Other:   
Appointment Contact:   
Additional Comments or Instructions to the Vendor  
Payment Information  
Fee Notes: [No Fee Notes]  
Order Fee: 0  
Payment Method: CC to Vendor  
First Name:   
Last Name:   
Street Address:   
City:   
State: (None Selected)  
Zip:   
E-mail:   
Card Number:   
Exp. Month/Year: 01 / 2013  
VISA MasterCard  
Back Finish

**Attach Document**

1 Choose the document type  
Other (None Selected) Hazard Disclosure Insurance License Other Sales Contract Special Instructions Statement of Engagement Tax Document

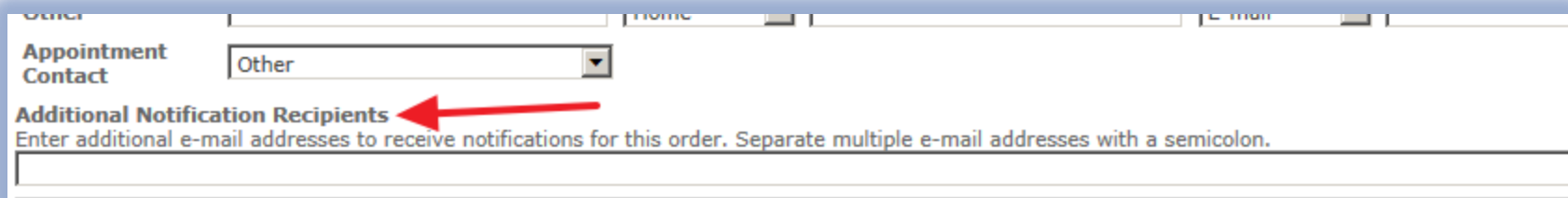
2 Attach paper documents using DirectFax™  
Our DirectFax technology lets you send us paper documents using any fax machine. Click the Print button below to print the special bar coded cover page. Fax it along with your documents to the printed toll free number.  
Upload documents button below and select your file to attach.

Print DirectFax cover sheet Upload documents

# a la mode Order Notifications

To ensure all appropriate parties receive the automated status notifications please complete the **Additional Notifications Recipients** field on every appraisal order.

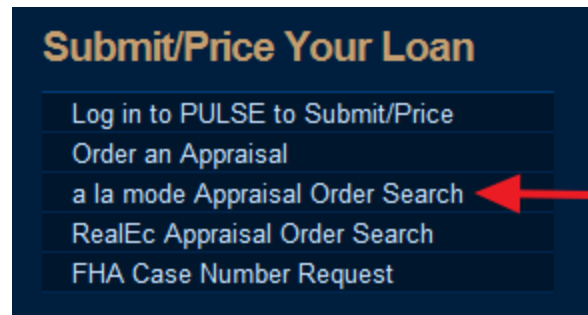
- Add all the recipients email addresses separated by a semicolon (;).
- Recipients can be the broker, AE, CSR, Processor or Borrower.



The screenshot shows a web form with several fields. The 'Appointment Contact' dropdown menu is set to 'Other'. Below it, the 'Additional Notification Recipients' field is highlighted with a red arrow. The text below the field reads: 'Enter additional e-mail addresses to receive notifications for this order. Separate multiple e-mail addresses with a semicolon.'

# Checking the Appraisal Status

1. Logon to Plaza Home page  
[www.plazahomemortgage.com](http://www.plazahomemortgage.com)
2. Click on **a la mode Appraisal Order Search**. A pop-up window will appear and take you into your appraisal pipeline.
3. To access orders previously completed in RealEc, click on **RealEc Appraisal Order Search**. A pop-up window will appear and take you to the search menu.



# a la mode Appraisal Pipeline

**Order Search** →

**Folders** →

**Active Orders** ←

Michael Smith | Mercury Network

Orders | Profile

New Order | View Order | Delete Order | Restore Column Widths

**Orders**

Find:

Starts With | Contains

In Field: Subject Street

Placed: Last 6 Months

**All Open Orders (152)**

Tracking #	Current Status	Due Date	In
392033-61317	Revision Needed	10/11/2006	
392033-61318	Modification Requested	11/11/2006	
392033-61319	In Progress	09/29/2006	
392033-61597	In Progress	12/07/2006	
392033-66236	In Progress	10/14/2009	
392033-66550	In Progress	11/25/2009	
392033-68701	In Progress	03/18/2010	
392033-68896	In Progress	03/24/2010	
392033-70066	In Progress	04/21/2010	
392033-70273	In Progress	04/29/2010	
392033-70700	In Progress	05/26/2010	
392033-70702	In Progress	05/26/2010	
392033-70708	In Progress	05/27/2010	
392033-70714	In Progress	05/26/2010	
392033-70897	In Progress	06/15/2010	
392033-70090	In Progress	06/17/2010	

Order Status Summary:

- All Open Orders: 183
- In Progress: 4
- Inspection Scheduled: 0
- Inspection Complete: 0
- Pending Quality Review: 0
- Due Today: 0
- Past Due: 176
- Exceptions: 0
- Awaiting Disclosure Expiration: 178
- Require Disclosure Date: 46
- No Borrower E-mail: 1
- Revision Needed: 3
- Delayed: 0
- On Hold: 3
- Payment Failed: 13
- Completed: 7
- Cancelled: 0
- Deleted: 0



# a la mode Appraisal Pipeline

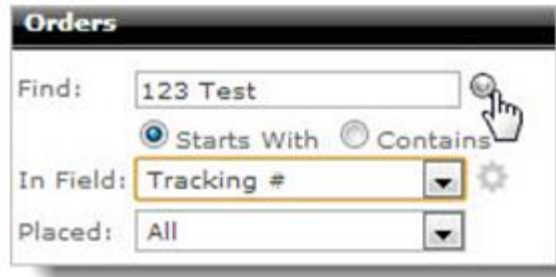
From the a la mode appraisal pipeline you can:

- Search for existing orders using the search tool on the left
- Managing your appraisal orders by clicking on the various folders that appear, i.e. Past Due, Payment Failed, On Hold, Completed
- Start a new order or view an order you have selected from your list



# Search for an Order

1. Type the search criteria into the Find box on the left side of the screen



The screenshot shows a search interface titled "Orders". It features a "Find:" text input field containing "123 Test". Below it are two radio buttons: "Starts With" (selected) and "Contains". To the right of these is a magnifying glass icon. Below the radio buttons is an "In Field:" dropdown menu currently showing "Tracking #". At the bottom is a "Placed:" dropdown menu showing "All".

2. Select the appropriate radio button to search for an item that **Starts With** or simply **Contains** your search criteria.
3. Using the **In Field** drop-down, select the field in which you would like to search.
4. In the **Placed** field, choose the timeframe in which you would like to search.
5. Press **Enter** or click the magnifying glass to execute your search



# Order Details

The following tasks can be completed from within the order:

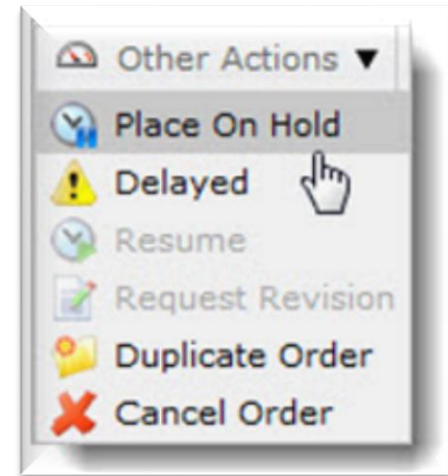
- Send a Message
- View and Attach Documents
- Change the order status
- Edit the FHA case number
- View the history of the order
- Edit property contacts
- View special instructions

The screenshot displays the 'Appraisal Order Details' page for a property at 2512 Briar Ridge Road, Naples, FL 34102. The interface includes a navigation bar with options like 'Back', 'Send Message', 'Attach Documents', and 'Other Actions'. The main content area is divided into several sections: 'Borrower' information, 'Appraised Value' (Order Date: 11/5/2012, Due Date: 12/21/2012, Fee: \$400, Payment Type: C.O.D.), 'Vendor Name' (Michael Smith), 'Ordered By' (Michael Smith), 'Lender Address', 'Appraisal Date', 'Loan Type', 'Loan Purpose' (1004 Fu/URAR (UAD)), 'Disclosure Date', 'Neighborhood', 'Sale Price', 'Estimated Value', 'Prior Date', 'Property Type', 'Legal Description', 'County' (Collier), 'Sq. Ft.', 'GSE Doc File ID', and 'Directions'. A map of the property is shown in the center. Below the map is a 'Documents' section with the message 'No documents are attached to this order, yet.' and an 'Attach Documents' button. On the right, a 'History (1)' section shows the order event: '11/5/2012 1:25 PM CST - In Progress by Test User'. At the bottom, there are sections for 'Inspection Contacts' (with an 'Edit Property Contacts' link) and 'Special Instructions' (with the message 'No special instructions were added to this order.').

# Other Actions

The **Other Actions** menu allows you:

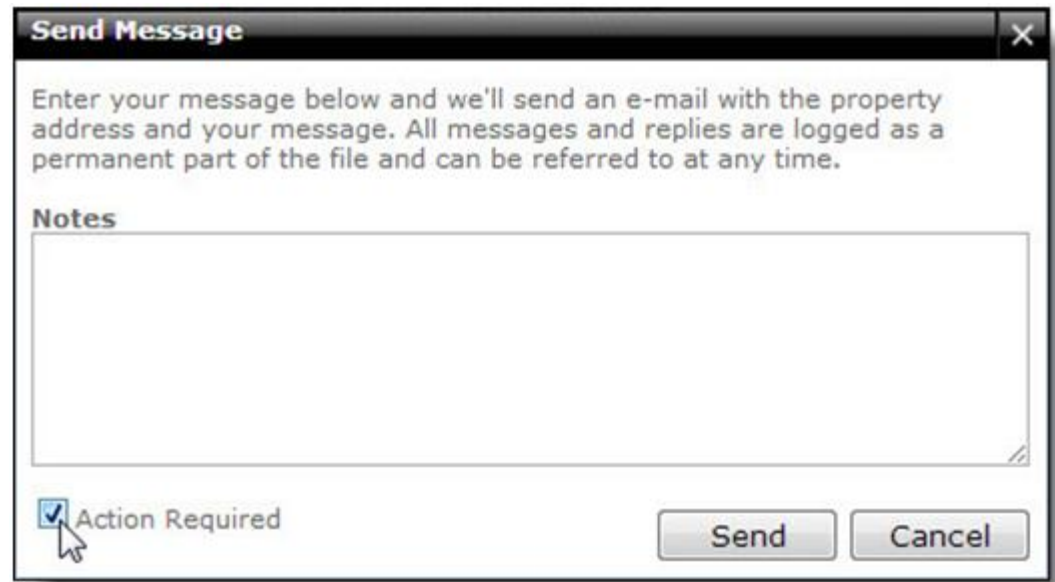
- Place an order on Hold
- Remove the order from Hold
- Request Revisions
- Duplicate the Order
- Cancel the Order



# Adding Comments to an Order

From the order details:

- Click **Send Message** on the upper left
- In the **Send Message** box, enter your message, check the Action Required box if the recipient needs to do something, and click **Send**.



**Send Message**

Enter your message below and we'll send an e-mail with the property address and your message. All messages and replies are logged as a permanent part of the file and can be referred to at any time.

**Notes**

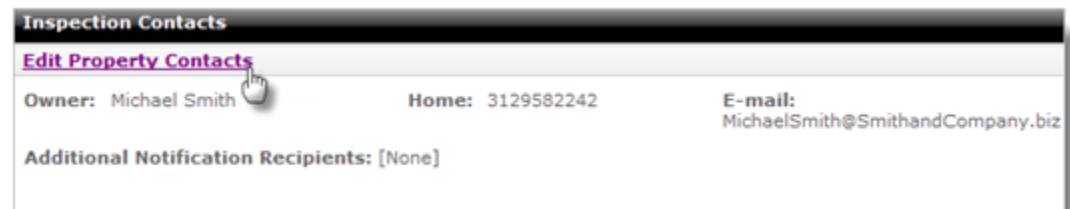
Action Required

Send Cancel

# Editing Contacts

To edit the property contacts for an order:

- Click **Edit Property Contacts**
- Enter the updated information
- Click **OK** to submit the changes

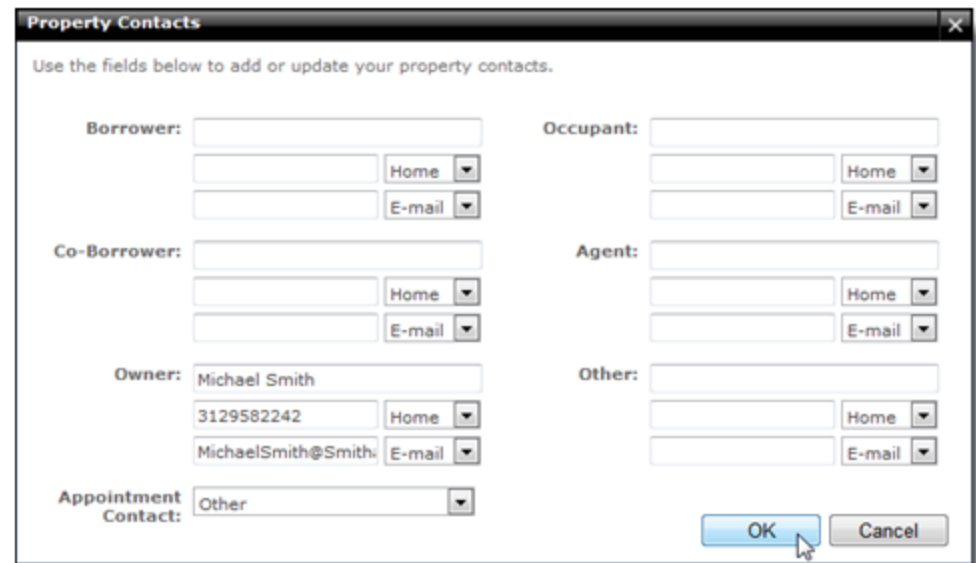


**Inspection Contacts**

[Edit Property Contacts](#)

Owner: Michael Smith      Home: 3129582242      E-mail: MichaelSmith@SmithandCompany.biz

Additional Notification Recipients: [None]



**Property Contacts**

Use the fields below to add or update your property contacts.

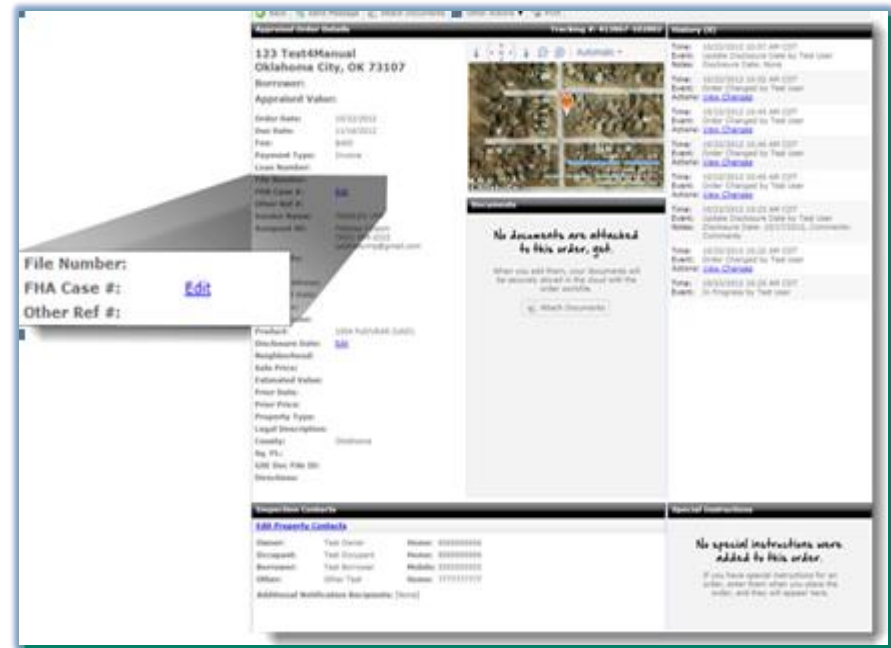
<b>Borrower:</b>	<input type="text"/> <input type="text"/> Home ▾ <input type="text"/> E-mail ▾	<b>Occupant:</b>	<input type="text"/> <input type="text"/> Home ▾ <input type="text"/> E-mail ▾
<b>Co-Borrower:</b>	<input type="text"/> <input type="text"/> Home ▾ <input type="text"/> E-mail ▾	<b>Agent:</b>	<input type="text"/> <input type="text"/> Home ▾ <input type="text"/> E-mail ▾
<b>Owner:</b>	Michael Smith <input type="text"/> 3129582242 Home ▾ <input type="text"/> MichaelSmith@Smith. E-mail ▾	<b>Other:</b>	<input type="text"/> <input type="text"/> Home ▾ <input type="text"/> E-mail ▾
<b>Appointment Contact:</b>	Other ▾		

OK Cancel

# Editing FHA Case Number

To edit the **FHA Case #** for your order:

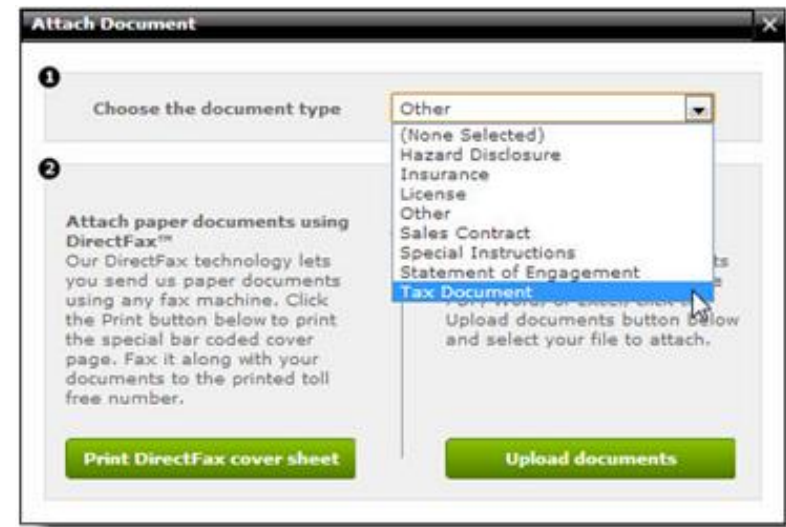
1. If your order already has an FHA Case #, click the **FHA Case #** to edit it. If the order does not have an FHA Case #, click **Edit**.
2. Enter the FHA Case # and click **OK**.
3. Click **OK** to confirm your changes.



# Attach Documents

From the order detail:

1. Click **Attach Document** on the top toolbar
2. Choose the document type from the drop-down list
3. Choose **Upload Documents**
4. Browse to the location of the document and select the file, click **Open**.
5. When the document finishes uploading, click **OK** on the confirmation screen





# Duplicate Order

Duplicating the order allows you to make an exact copy of the order:

1. Click on **Other Actions**
2. **Duplicate Order**
3. Complete the required fields
4. Verify the order information, update or change the order fee and payment method (if necessary), and click **Finish**
5. Click **OK** on the confirmation screen to return to you list of orders

The screenshot shows a web application interface for creating a new appraisal order. The form is titled "New Appraisal Order" and is part of a system named "PEBBLES VMP". The form is divided into several sections:

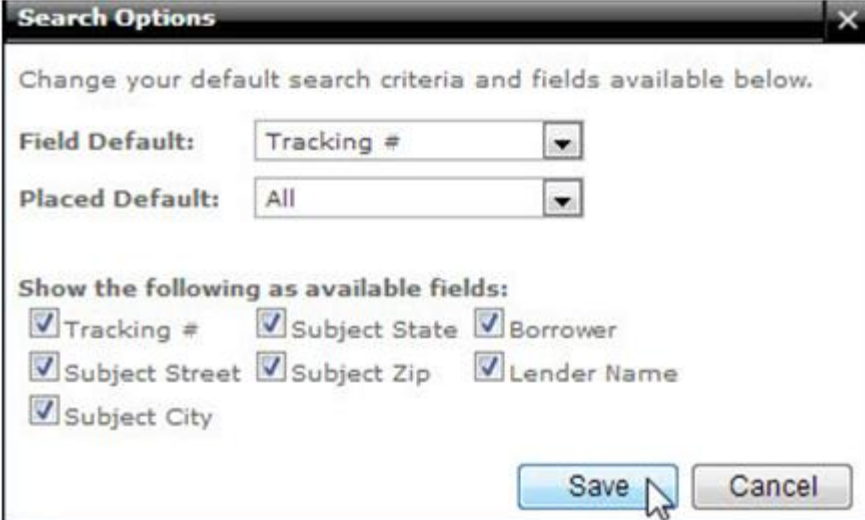
- Assignment Information:** Includes fields for Due Date (11/14/2012), Loan #, File #, Form/Type (1004 FUDUAAA), Sales Price, Loan Amount, Estimated Value, and FNA #.
- Property Information:** Includes fields for Address (123 TestManual), City (Oklahoma City), State (OK), Zip Code (73107), and County (Oklahoma).
- Contact and Access Information:** Includes fields for Occupancy, Borrower, Co-Borrower, Owner, Occupant, Agent, Other, and Appointment Contact.
- Payment Information:** This section is highlighted with a red box. It includes fields for Order Fee\* (400) and Payment Method\* (C.O.D.).

The form also includes a section for "Additional Comments or Instructions to the Vendor" and "Back" and "Finish" buttons at the bottom right.

# Tips-Search Defaults

For faster searching, you can change what these fields are set to by default.

1. In the **Field Default** drop-down, choose which option should be chosen by default.
2. In the **Placed Default** drop-down, choose which search option should be chosen by default.
3. Under **Show the following as available fields:**, choose the items to appear as options in the **In Field** drop-down. **Fewer checked boxed will result in a faster search.**
4. When you've made your selections, click **Save**



The screenshot shows a dialog box titled "Search Options" with a close button (X) in the top right corner. The dialog contains the following elements:

- A heading: "Change your default search criteria and fields available below."
- A "Field Default:" label followed by a dropdown menu showing "Tracking #".
- A "Placed Default:" label followed by a dropdown menu showing "All".
- A section titled "Show the following as available fields:" containing six checked checkboxes:
  - Tracking #
  - Subject State
  - Borrower
  - Subject Street
  - Subject Zip
  - Lender Name
  - Subject City
- At the bottom right, there are two buttons: "Save" (highlighted with a mouse cursor) and "Cancel".



- If a **refund** or **additional funds** are required on an order the AMC can process that directly. Simply **post a message** stating the additional charge is approved on the original card or add another credit card by **Update the Payment Information** under **Other Actions**.
- The AMC can change the **appraisal product type** in the event it was ordered wrong. Once the AMC has made the change it will automatically update in a la mode.



# Contacts

- Your **AE** or **CSR's** can answer questions about how to use a la mode.
- System slowness or login issues- a la mode Client Relations – (888)794-0455



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