Value Connect

Full On-Boarding Walk Through
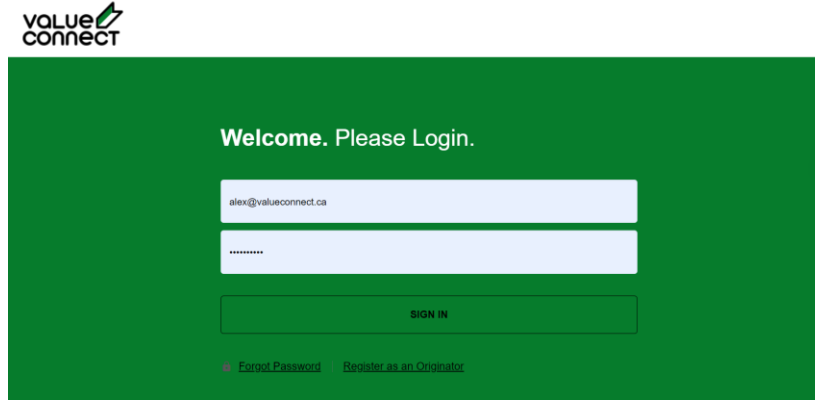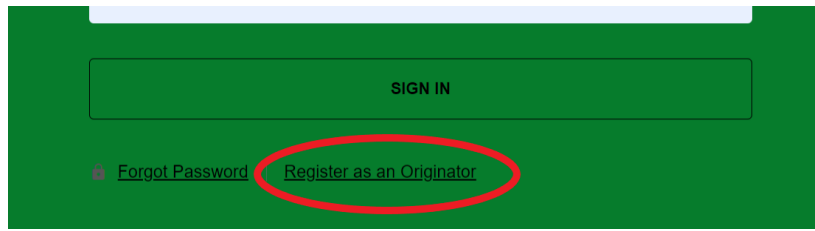
Contents

Signing Up to Value Connect

First step is to sign up/sign in. Go to www.valueconnect.ca and click Login or use this link. You can also go to "Solutions", then "Mortgage Sales", then "Register Now".

This Link will bring you to our login page, and under the Sign In button, you click 'Register as Originator' to create an account.

From here, you will go through our terms of service page (will need to scroll to the bottom of terms for you to accept).

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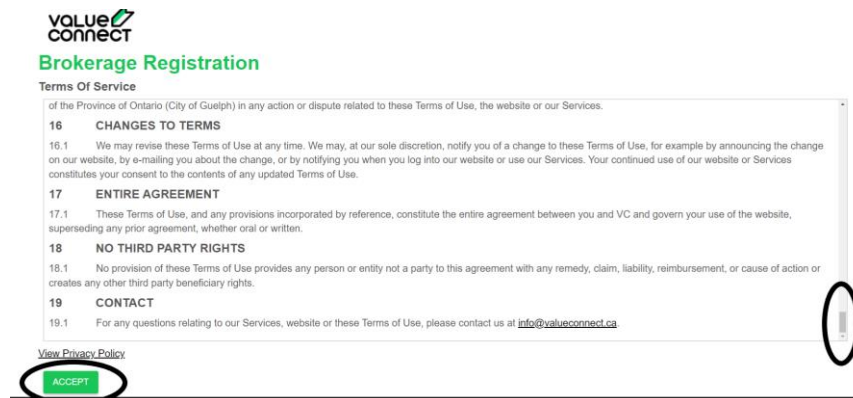
The next steps require you to completing our registration page. Every field with a red asterisk (*) is required.

Provide a password in the correct format and length. (Note, your password must be at least 8 characters, include an Upper AND Lower case letter, a number and a special character – like !@#$%).

Once the registration is complete. You will be directed to your home page Dashboard. From this Dashboard you can see all your appraisals in their different statuses, as well a place a new order. You will also have your Value Connect Account Rep's information in case you needed assistance.

(Note: see Originator Dashboard for more info.)
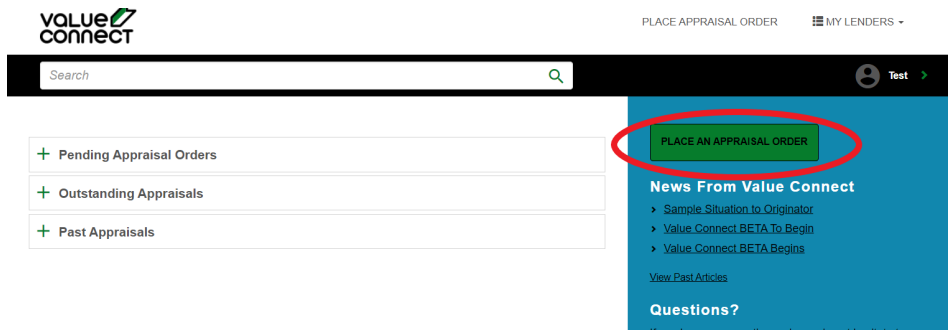
Integrated Ordering Process

The Ordering Process for appraisals through Value Connect is very simple.

*This is a walk-through for One-Click Ordering using an Integration.
To Order Manually through the portal, please see "[Manual Ordering Process](#)"

Value Connect is integrated with major platforms (Filogix, LMS360), with the option to integrate with many more.

If you use an alternate platform, please contact us toll free 1-844-383-2473 to investigate integration opportunities.

Filogix Expert®

Ordering appraisals through Filogix Expert is very easy. Complete your application in Filogix as you would normally, inputting all necessary fields.

Request the appraisal from the Subject Property section – click Request Appraisal button.

Once you click 'Request Appraisal' – select Value Connect and the report type from the drop-down boxes.

Once you have selected Value Connect and the product type, fill out the additional information below. Be sure to insert special Instructions, such as appraising house + 5 acres, or best time to contact borrower to schedule the inspection.

By Selecting the Validate button, it will tell you whether you have all the necessary information Value Connect needs to do an appraisal. You can select each hyperlink to fill out the necessary field(s). Note: it's unlikely for there to be many alerts with a completed/detailed application.

If all the necessary fields were completed, the validate option will confirm you are good to go!
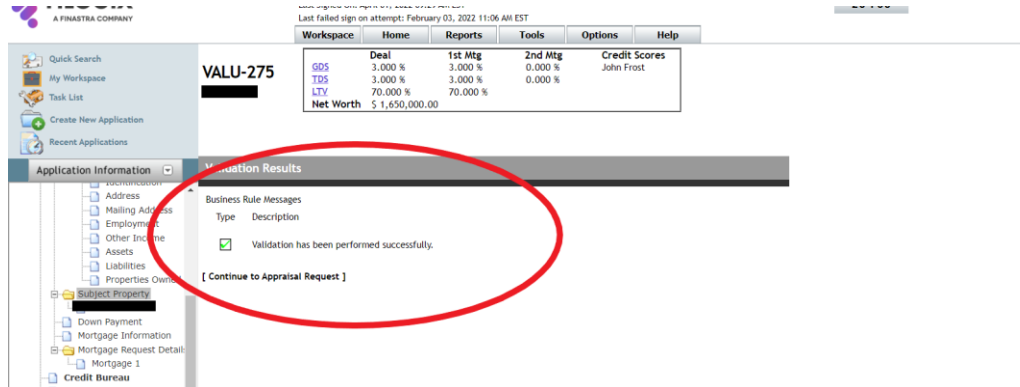
Once the validation process is complete, you can select submit request.
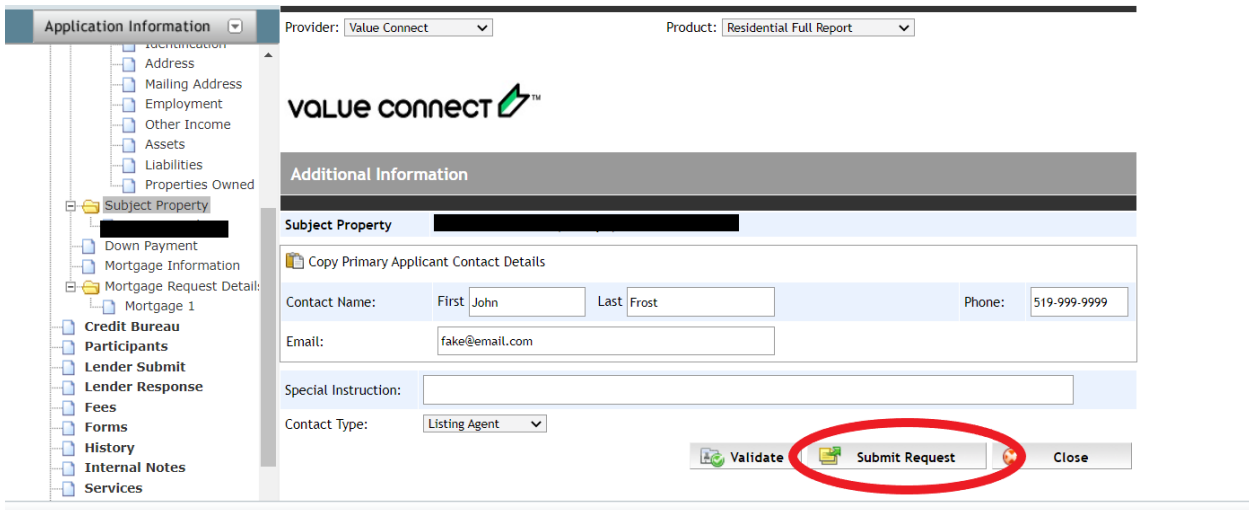
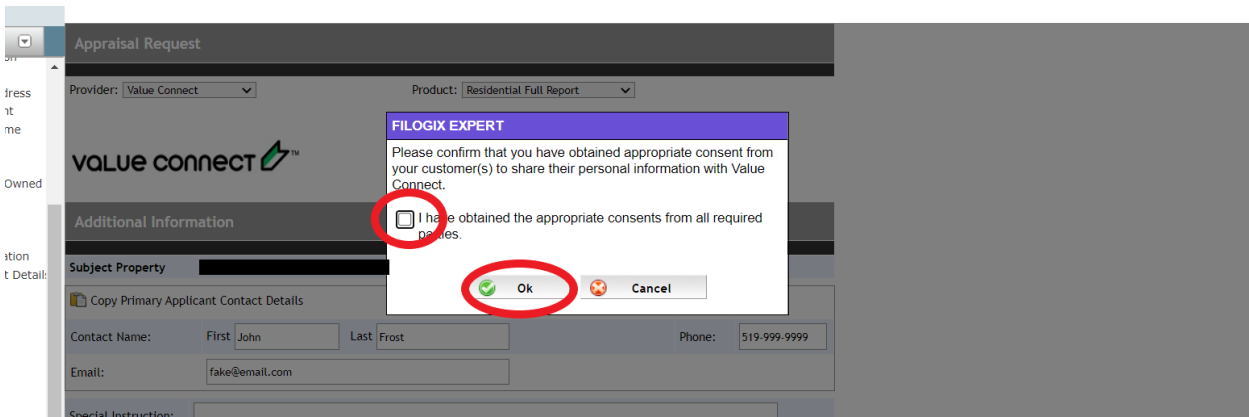Confirm you have the clients consent to pass information/order appraisal.

Once confirmed, you will see the summary of the order below with the submission status. You then need to click view order to complete the final steps.

After Integration Sends Info to Value Connect

This will take you to the Value Connect site. All the information from the Filogix will be imported into this order and the final steps would be to select a lender and underwriter associated with that lender, so we can make sure an approved appraiser receives the order.

Placeholder Lender
NOTE: Choose **"Placeholder Lender"** option if unsure which lender you are going with. Placeholder Lender options include AAA, Alt-A / B, and MIC/Private. Insert/Select Value Connect email/info as the Underwriter until you find the Lender. Adjust the order when you choose the Lender and have the Underwriter's contact info.

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Once the Lender and Underwriter are selected, you have the option of selecting an appraiser if the Lender's guidelines allow.

Draft an Appraisal Order

Talk to your account representative

Lender Information

Lender *

Placeholder Lender Alt-A / B

Loan Amount *

$350,000.00

Lender Reference Number

Select Lender Underwriter Contact *

Test Underwriter (test@valueconnect.ca)

Test Underwriter
Lender Underwriter Contact

Client Information
Appraisal Information
Property Information
Property Access Contacts
Lender Information
Appraiser Selection
Additional Files

Review Order →

***Please Note: We suggest letting our system select Appraisal Firm for best turnaround time. ***

Appraiser Selection

Appraisal Firm Selection

◉ Auto Assign Appraisal Firm
○ Choose an Appraisal Firm

Previous ←   Clear Fields   Continue →

Client Information
Appraisal Information
Property Information
Property Access Contacts
Lender Information
Appraiser Selection
Additional Files

Review Order →

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Additional Files

If this is a purchase, the Agreement of Purchase & Sale must be added in the additional Files Section. We recommend uploading the MLS or property Feature Sheet if one is available. You can also add any additional documentation in the section as well.

From Here click – Click "Review Order" when it is visible to complete your order. You will be brought to your order dashboard to review.

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Order Dashboard

This will take you to your order dashboard. Once on the dashboard you will see the status of your order. Order Drafted means the quote was automatically generated and needs to be accepted. *If status is "Pending Quote," our customer success team will provide pricing and turnaround options.*

Scroll down to review the quote and pricing.

Once reviewed, you accept the quote by selecting 'Payment Options' at the top right of the dashboard.

Payment Options

From here you can select who will be paying for the appraisal; Client, Brokerage or Client & Brokerage if you are splitting the payment with a client. **Clicking save after selecting Payment Options is how you accept the quote, and the process can proceed.**


Once saved, the payment request email is sent. After payment is complete, the appraiser will call the appropriate contact to set up the inspection.

Manual Ordering Process

This is the process of ordering an appraisal without an integration. Ordering through Value Connect's portal is easy. This process begins by logging onto the Value Connect portal and selecting 'Place an Appraisal Order'.

***Please note, any field with a (*) is a required field to process the order. ***
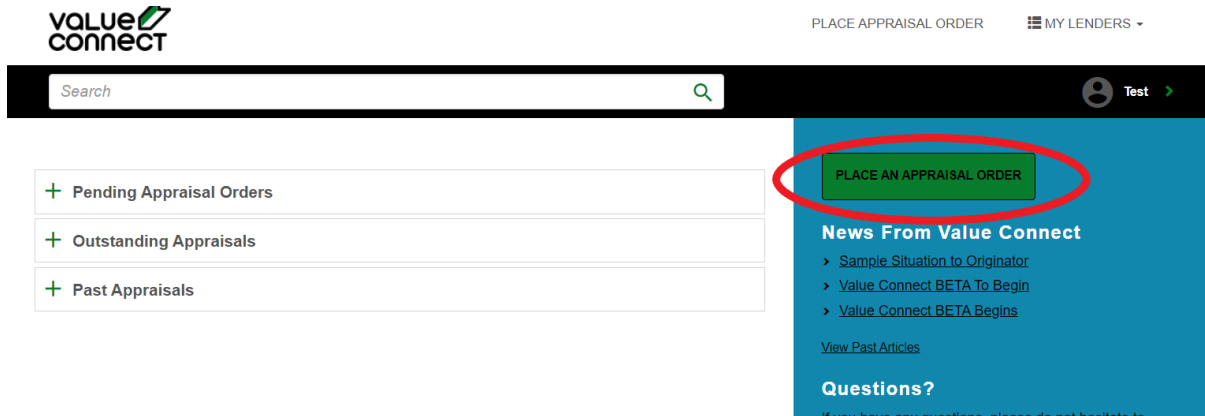
Client information

Once selected you will be required to fill out the necessary information. Once completed select 'Continue'.
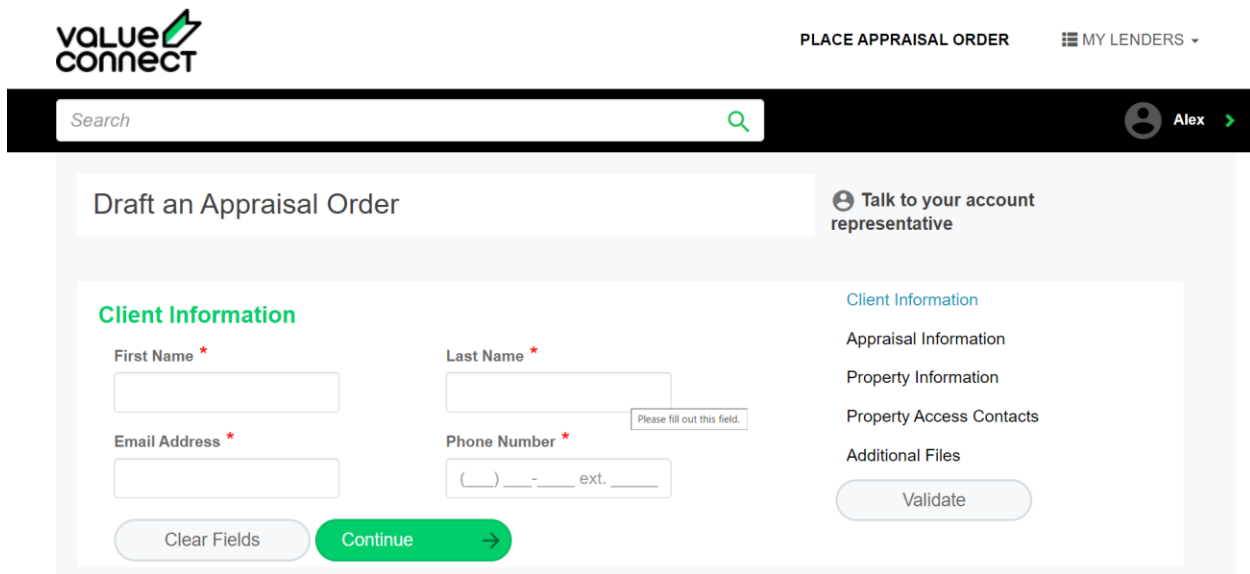
***Please note, any field with a (*) is a required field to process the order. ***

Appraisal information

The next section is the appraisal information. You must fill out the purpose, appraisal types and mortgage type.

***Please note: Choose "Rush Order" if you require the report sooner than typical turnaround times for your region. Additional fees will apply. ***

***Please note, any field with a (*) is a required field to process the order. ***

Omission of information would classify the order as improperly placed or incomplete and may be subject to correction and additional fees – Please make sure all applicable options are selected. *(Ex: if you do not put market rents and they are needed, additional cost will be added.)*

Property Information

Next section is property information, fill out all required sections and select 'Continue'. *(Note: By putting in postal code, appropriate city will populate.)*

***Please note: Out Buildings, Waterfront, Seasonal and Leased land options need to be selected if they apply. Omitting this information may cause a fee increase. ***

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Property Access Contact

The next section is Property Access Contact, if this is a Refinance, you can copy client information by choosing "Same as Client." For purchases, include the appropriate contact information in. Hit 'Continue'
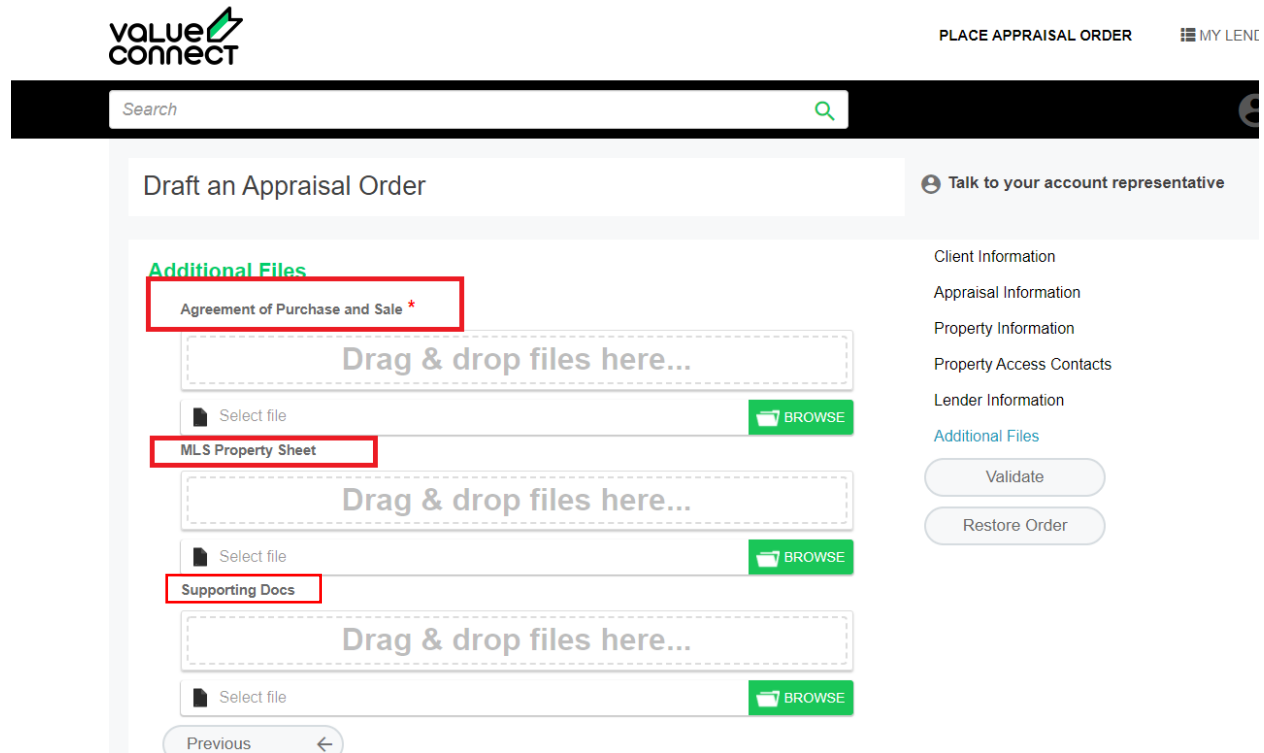

Lender Information

The following section covers lender information. Select the Lender that applies (required so we can select an approved appraiser). **NOTE**: *Choose "Placeholder Lender" option if unsure which lender you are going with. Placeholder Lender options include AAA, Alt-A / B, and MIC/Private. Insert/Select Value Connect email/info as the Underwriter until you decide on the Lender. Adjust the order when you choose the Lender and have the Underwriter's contact info.*

Once Lender is selected, select from the underwriters or add one if not listed.

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Additional Files

For all purchases, the Agreement of Purchase and Sale is required, and can be added using the additional files tab. MLS listing or feature sheet can also be added here. **Any other additional support documentation can also be added here.

Appraiser Selection

Once lender Information is generated with the Underwriter, the option for Appraiser Selection will appear. ***We strongly suggest you allow the system to select appraisal firm for best turnaround time. Selecting your own appraiser can result in higher cost, longer turnaround times.***

From Here click "Review Order" to complete your order. You will be taken to your Order Dashboard.
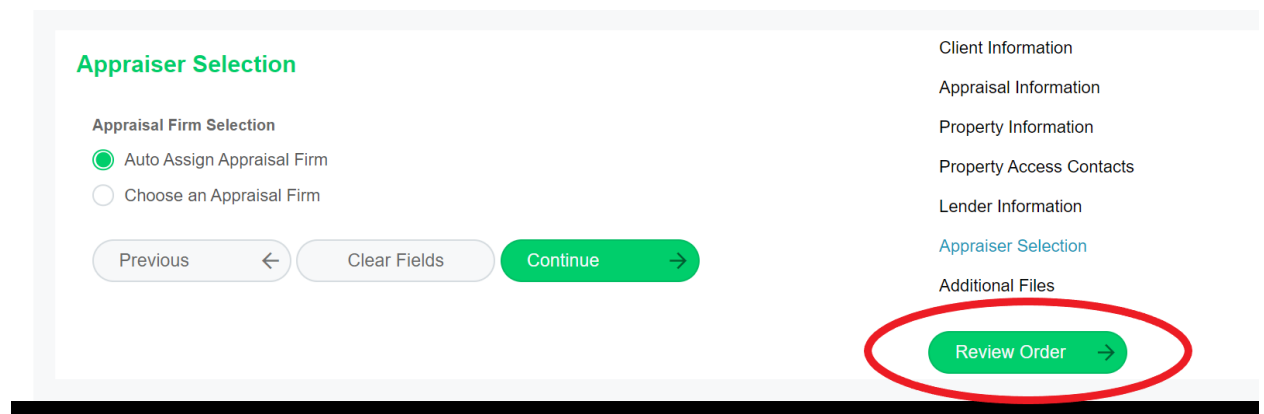
Order Review Dashboard

This will take you to your order dashboard. Once on the dashboard you will see the status of your order. Order Drafted means the quote automatically generated and needs to be accepted. *If status is "Pending Quote," our customer success team will provide pricing and turnaround options.*

(Note: For more info see Originator Dashboard)

Scroll down to review the quote and pricing.

Once reviewed, you accept the quote by selecting 'Payment Options' at the top right of the dashboard.

Accepting A Quote

Once on the dashboard you will see the status of your order. Order Drafted means the quote was auto generated and needs to be accepted. *If status says Pending Quote, our customer success team will provide pricing and turnaround options prior to quoting. You'll receive an email notification to select a Payor once they've updated the system.*
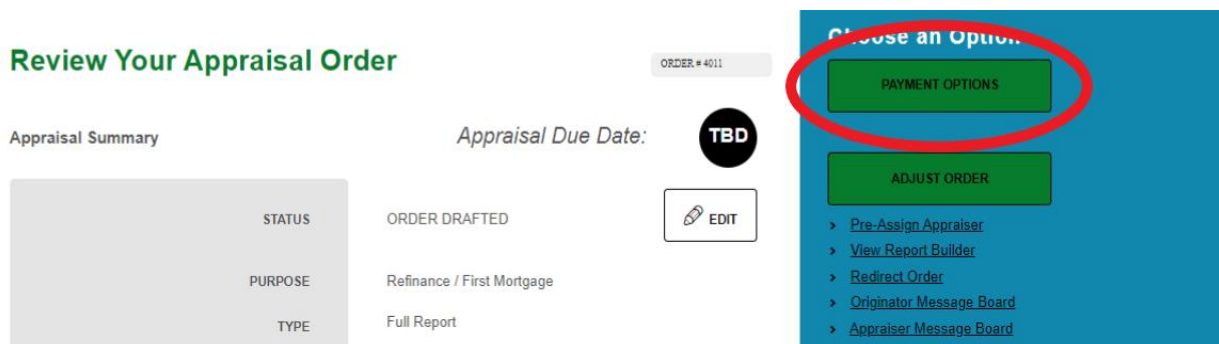

Scroll down to review the quote and pricing.

Once reviewed, you accept the quote by selecting 'Payment Options' at the top of the dashboard.

From here you can select who will be paying for the appraisal; Client, Brokerage or Client & Brokerage if you are splitting the payment with a client. **Clicking save after selecting Payment Options is how you accept the quote, and the process can proceed.**

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Once saved, the payment request email is sent. After payment is complete, the appraiser will call the appropriate contact to set up the inspection.

Originator Dashboard

The originator dashboard is your main page once you have logged into your Value Connect account. If you do not have a Value Connect account, click here and set up your account. (If you need help, refer to 'Sign Up Walk Through'.)
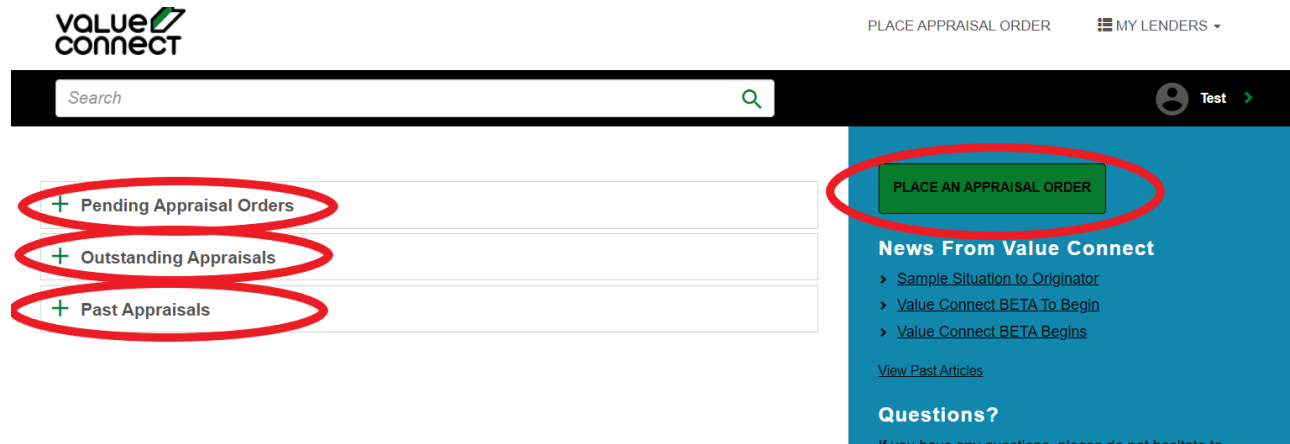
From the dashboard, you can see your **Pending Appraisal** Orders, your **Outstanding Appraisal** Orders, and **Past Appraisals**, as well as where to manually **place an Appraisal Order**.

- **Pending Appraisal Orders:** Appraisal Orders that still need to be paid or specifically priced. You can make sure to accept the quote and if it was, call your client to make sure the invoice was received and let them know that process is waiting for payment.
- **Outstanding Appraisals:** Your appraisal has been paid for and is currently being scheduled or completed. There are a few different statuses (pending inspection, pending report) that your order can be in while in this stage. See Statuses.
- **Past Appraisals:** This is where you can review all your past appraisals, both completed and cancelled orders.

By Clicking on your order number, you will enter that specific order.

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This will bring you to that specific order's main order page, from here you can review all details and status of that individual order.

Specific Appraisal Order Dashboard

If you made a mistake or need to make changes to the order, you can select adjust order on the right-hand side.

You can send a message to the rep looking after your order using the originator dashboard.

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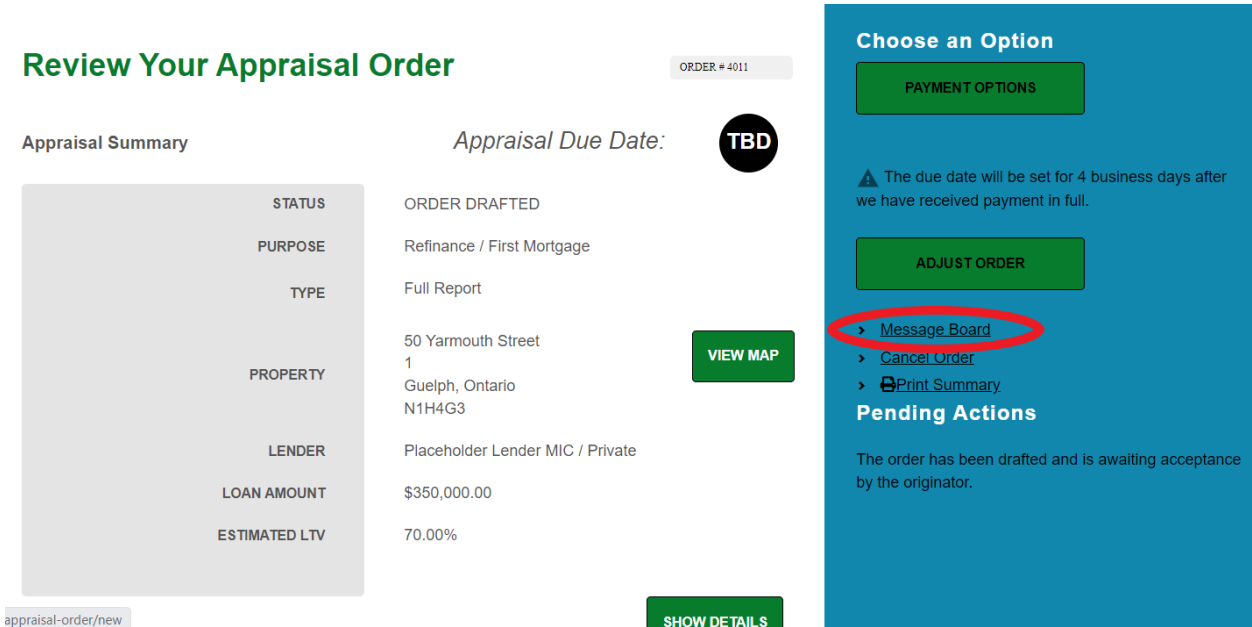
Order Statuses

Statuses were titled in a way to hopefully be self-explanatory but in case you are having issues in a specific status here are what they mean and your next steps.

	Order	Meaning	Next Step
Pending Appraisals	Order Drafted	Quote has been generated	**Need to accept quote "Payment Options" – Save.**
	Pending Quote	More specific pricing is required	**No action needed.**
	Finalizing Quote	Customer Success team is putting your quote together	**No action needed.**
	Pending Payment	Quote has been accepted; invoice needs to be paid.	**Get payment done. Remind Client.**
Outstanding Appraisals	Pending Assignment	Appraiser is being assigned to the job.	**No action needed**
	Pending Appraiser Acceptance	Waiting on Appraiser to Accept the Job.	**No action needed**
	Pending Schedule Inspection	Appraiser and contact will set up time/date.	**Make sure Inspection was scheduled.**
	Pending Inspection	Inspection booked, waiting on appointment.	**No action needed.**
	Inspection Complete	Inspection complete, waiting on report.	**No action needed.**
	Report Complete	Report has been completed and uploaded/sent to lender.	**No action needed**
	Resubmission Required	Appraisal request needs to be changed, or fixed.	**Fix order. (May required Appraiser to adjust)**
Past Appraisals	Report Accepted	Report has been completed and accepted by lender.	**No action needed**
	Report Cancelled	Appraisal request was cancelled.	**No action needed**

Originator Message Board

The originator message board (for Mortgage Sales Teams & Brokers) is a fantastic feature to keep all correspondence relating to your appraisal in one convenient spot. This allows anyone on either end to get a quick update on the status of your order and review what has been discussed or done.

The message board is located on the right side of your order.

Once selected you, you will be brought to the message board page. You will need to select 'Send a Note' on the right side, enter your message and select 'Save'. This message will now be saved in the message board.

Replies are logged in the portal and simultaneously sent via email to keep you updated.

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Additional Support

For additional support or information please contact us:

Call Toll-Free: 1- 844-383-2473

Email: info@valueconnect.ca