



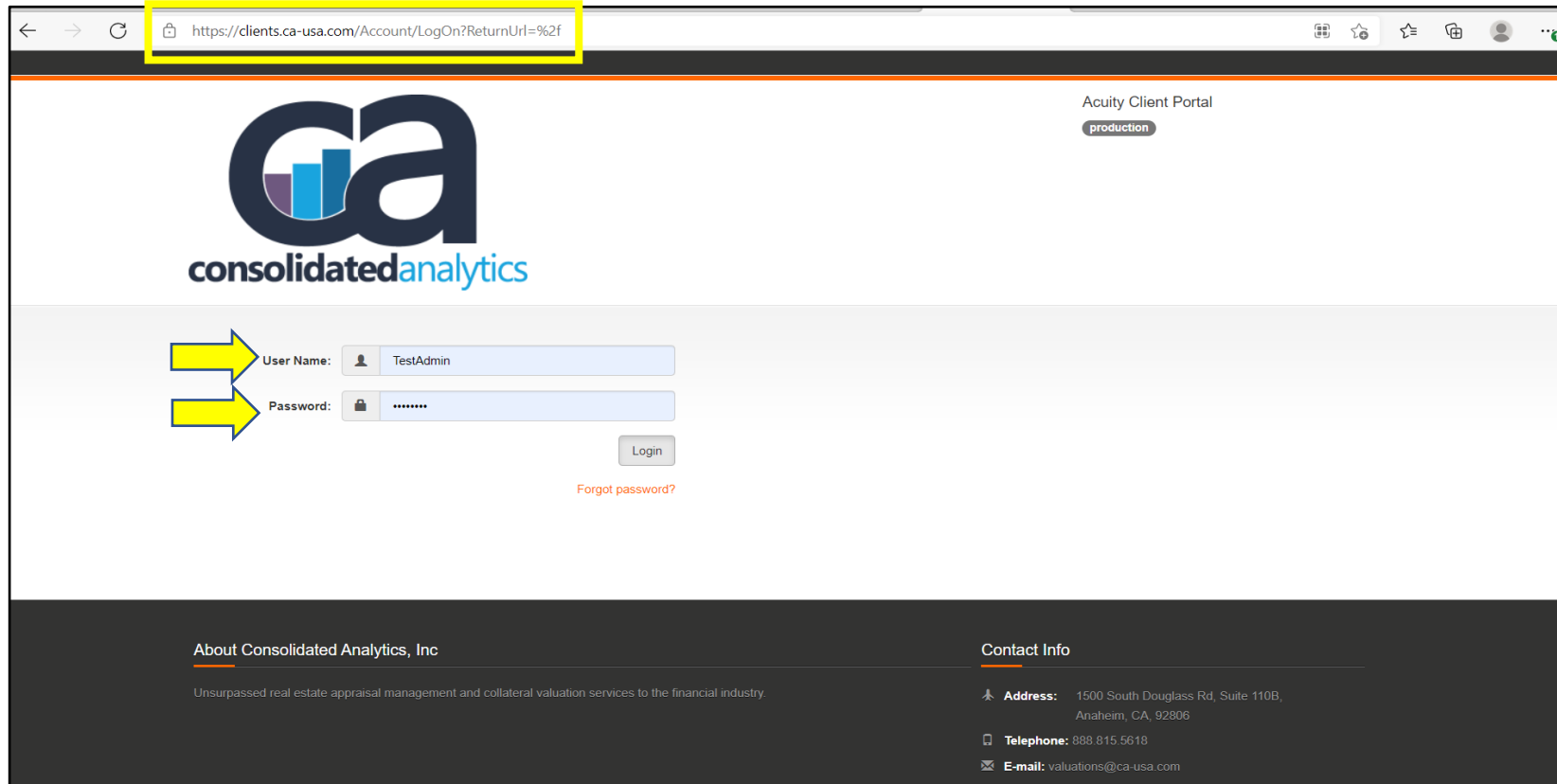
# Client Portal User Guide

Know your value.  
Realize your potential.

# Logging In and Managing Your Password

**Step 1:** Go to <https://clients.ca-usa.com> and login with Username and Password.

**Step 2:** If you forget your password and/or want to change your password, click the *Forgot password* link. An email will be sent to your address on file prompting you to make the change.



The screenshot shows a web browser window with the URL <https://clients.ca-usa.com/Account/LogOn?ReturnUrl=%2f> highlighted in the address bar. The page features the Consolidated Analytics logo and the text "Acuity Client Portal" with a "production" status indicator. The login form includes fields for "User Name" (containing "TestAdmin") and "Password" (masked with dots), both indicated by yellow arrows. A "Login" button is positioned below the password field. A red link labeled "Forgot password?" is located below the login button. The footer contains two sections: "About Consolidated Analytics, Inc." with the tagline "Unsurpassed real estate appraisal management and collateral valuation services to the financial industry." and "Contact Info" with details for Address (1500 South Douglass Rd, Suite 110B, Anaheim, CA, 92806), Telephone (888.815.5618), and E-mail (valuations@ca-usa.com).

# Placing A New Order

## Step 1: Select *New Order*

Acuity Client Portal Logged in as: TestAdmin [Log Out](#)

Orders

Home

Order Search <

Order ID:

Loan Number:

Transaction #:

Bwr. Surname:

Address:

City:

☒ Only Open Orders

<input type="checkbox"/>	ID	Loan Number	Loan Type	Loan Purpose	Product	Address	City	State	Borrower
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Page 1 of 0   100 ▾ No records to view

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***\*Note – all fields highlighted in yellow are required***

**Step 2: Select a product from the dropdown**

**Step 3: Enter subject address**

Acuity Client Portal

Logged in as: TestAdmin Log Out

Orders

Home > Place a New Order

**Please Specify the Product**  
Tell us what product you need by selecting it in the list below. The rest of the order form will be dependent on the information needed for that product.

What product do you need? (Choose a Product) ▼

**What is the subject property's address?**  
Please specify the complete property address. Ensuring that the address is correct will help avoid any processing delays.

Address Unit/Suite

City State (Choose a State) Postal Code

Occupancy (Choose an Occupancy) APN County: Unknown

**What are the details of the accompanying loan?**  
The processing of this order requires information regarding any loan associated with this transaction.

What is the loan / reference number?

**Estimates of Value**

Last Valuation Amount: Last Valuation Date:

**Who is the borrower / mortgagee?**  
Please specify a name and, if necessary, contact information for the borrower or mortgagee.

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## Step 4: Enter pertinent loan details **\*\* The loan/reference number is your internal identifier and should be entered on every order.**

### What are the details of the accompanying loan?

The processing of this order requires information regarding any loan associated with this transaction.




What is the loan / reference number?	<input type="text"/>
What is the loan's purpose?	<div>(Choose a Loan Purpose) ▼</div>
What type of loan is it?	<div>(Choose a Loan Type) ▼</div>
What is the FHA Case Number?	<input type="text"/>
What is the lien position?	<div>(Choose a Lien Position) ▼</div>
What is the loan amount?	<input type="text" value="0.00"/>
What is the property's sale price?	<input type="text" value="0.00"/>
Is there a Fannie Mae Case File ID?	<input type="text"/>

## Step 5: Enter borrower / coborrower information

### Who is the borrower / mortgagee?

Please specify a name and, if necessary, contact information for the borrower or mortgagee.

First Name Last Name Work Phone Home Phone Mobile Phone Email 

### Is there a co-borrower / co-mortgagee?

If there is a co-borrower or co-mortgagee, please specify a name and, if necessary, contact information for that individual.


First Name Last Name Work Phone Home Phone Mobile Phone Email


## Step 6: Provide property access information when applicable

If the borrower will provide access, click the box indicating as such

If there is an alternate POC, please provide their contact information as well as a lock box code if applicable

**Who should be contacted to obtain access to the property?**  
If inspection of the subject property will be required, it will be necessary to contact someone to schedule a visit. There may be other relevant access instructions or a lockbox code that you can provide.

The borrower will be the access contact ☐ 

 First Name  Last Name

Work Phone  Home Phone






Mobile Phone  Email

Property Access Contact Address

Is there a lock box code?

Please note any access instructions.

Is there a preferred inspection time?

Pref. Start	<input type="text"/>		Pref. End	Optional	
Addtl. Start	<input type="text"/>		Addtl. End	Optional	
Time Zone	Eastern Time 				

## Step 7: Provide any special instructions specific to this order

### Are there any special considerations for this order?

If you are aware of any special handling requirements for this order, please indicate those below.

This is a **rush** order ☐

This is a complex property ☐

This is a high-profile customer ☐

Side-by-Side Order ☐

Describe any special handling required.



# Step 8: Select payment method

**\*\* All options may not be available depending on how your account was initially set up**

*Invoice Me – Monthly billing cycle*

What payment option should be used?  
There may be a few options for payment for these services. Select the option that you'd prefer.

Select a payment option

Invoice me

Invoice me

I will provide payment account information.


Email the borrower for payment account information

You have two options for credit card payments.

**1. I will provide payment account information** – when this option is selected, you will enter the credit card information immediately after the order is created.

Upon order creation, the page will default to the below. Click the **Processed Payments** tab

Status HistoryCompleted Report and DocumentsInstructionsFee AdjustmentsProcessed PaymentsPeopleOther Products for this Loan

Orders that require payment prior to normal processing must have payments recorded here. Once the first non-zero payment has been recorded, processing of the order will commence, since certain client contracts may require only a partial payment in advance.

Enter Credit Card/ACH


Processed On	Description
--------------	-------------

# Step 8: Select payment method

**\*\* All options may not be available depending on how your account was initially set up**

Select Enter Credit Card/ACH

[Status History](#) [Completed Report and Documents](#) [Instructions](#) [Fee Adjustments](#) **Processed Payments** [People](#) [Other Products for this Loan](#)



Orders that require payment prior to normal processing must have payments recorded here. Once the first non-zero payment has been recorded, processing of the order will commence, since certain client contracts may require only a partial payment in advance.

Enter Credit Card/ACH

Processed On	Description
--------------	-------------

Enter the credit card information and click *Save Payment Information*. *\*Note – the order will remain on hold until payment is received*

er Item 3411786.1 ( 108 W Winona ) > Dashboard

Order ID: 3411786	Order Date: 11/1
Loan No.: CCTEST111021.1	Borrower: Jen
Purpose: Asset Valuation	Co-borrower: Not
Item ID: 1	Order Date: 11/1
Product: 2075 Exterior	Client Fee: \$1.0
ase File ID:	Property Data ID:


Put on Hold

Request Correction

Upgrade

Cancel

[ry](#) [Completed Report and Documents](#) [Instructions](#) [Fee Adjustments](#) **Processed Pay**



Orders that require payment prior to normal processing must have payments recorded here. Once the certain client contracts may require only a partial payment in advance.

dit Card/ACH

d On	Description
------	-------------

Add Payment

Transaction Type:

Credit Card

Card Number:

Credit Card Number

Expiration:

01 - Jan

2021

CVV Code:

CVV

First Name:

First Name

Last Name:

Last Name

Save Payment Information

# Step 8: Select payment method

**\*\* All options may not be available depending on how your account was initially set up**

You have two options for credit card payments.

2. **Email the borrower for payment account information** – when this option is selected, you will enter the borrowers email address below. Once the order is created, a secure payment link will be emailed to the borrower.

***\*Note – the order will remain on hold until payment is received***

What payment option should be used?

There may be a few options for payment for these services. Select the option that you'd prefer.

Select a payment option

Email the borrower for payment account information

Specify the payment contact's email

Is there a portion of the total fee to collect via credit card or eCheck?

## Step 9: Enter additional order contacts if applicable

If no additional contacts are needed, order communication will come to you

## Step 10: Review order information and Place this Order

### Who should be contacted if there are questions on this order?

Please specify a contact person that can answer any questions that arise during processing of this order.

First Name

Last Name

Work Phone

Email

Client Contact Address

I need to specify a second contact person. ☐

I need to specify a third contact person. ☐



Place this Order

Cancel

**Step 11:** Once the order has been placed, the order info will be displayed on your dashboard. Use the tabs to view completed reports, upload additional documents and provide order specific instructions.

Orders

Home > Order Item 3328344.1 ( 123 Test St ) > Dashboard

Hide Summary ^

Order ID: 3328344	Order Date: 10/7/2021	Client: 56135 (Test Client)	Branch: 2527 (TestBranch2)
Loan No.: 123TEST10.7	Borrower: Jeanette Test	Address: 123 Test St Glenolden, PA 19036	County (Region): Delaware (PA)
Purpose: Other	Co-borrower: Not Specified	Loan Type: Conventional	FHA Case No.: Not Specified
Item ID: 1	Order Date: 10/7/2021	Required By Date: 10/10/2021	Issue To: N/A
Product: CAPI-EXT .1	Client Fee: \$0.00	Balance: \$0.00	Transaction No.:
Case File ID:	Property Data ID:		

Edit Order

Put on Hold

Request Correction

Upgrade

Cancel

Status History

Completed Report and Documents

Instructions

Fee Adjustments

Processed Payments

People

Other Products for this Loan

Order Date: 10/7/2021 at 5:47 PM EDT

Due Date: 10/10/2021 at 5:47 PM EDT

Inspection Appointment: Undetermined or Not Applicable

Estimated Value: Undetermined or Not Applicable

Add Comment

Date	Updated By	Description
10/7/2021 5:48 PM EDT	System Account	Order Confirmed
10/7/2021 5:47 PM EDT	Jeanette Mills	Order Received

# Order Management

## Step 1 : Reviewing your open order pipeline.

If you want to view all of you open orders, leave all fields on the left blank. Be sure the *Only Open Orders* box is checked and click *Search*. All open orders will display on the right. From here, you can access each order to review the status. You can also export your pipeline to excel by clicking the Export button in the upper right side of your screen.

Order Search

Search

Order ID:

Client: Test Client

Loan Number:

Transaction #:

Bwr. Surname:

Address:

City:

☒ Only Open Orders

Open

Hold

Cancel

Upgrade

Comment

New Order

Export

<input type="checkbox"/>	ID	Client	Loan Number	Loan Type	Loan Purpose	Product	Address	City	State	Borrower	Orders
<input type="checkbox"/>	3191028.1	Test Client	TestTrainingFile	NONE	Asset Valuation	BPO Recon One Source	20 Winding Way	Irvine	CA		8/17/20
<input type="checkbox"/>	3328344.1	Test Client	123TEST10.7	CONV	Other	CAP-EXT .1	123 Test St	Glenolden	PA	Jeanette Test	10/7/20

## Step 2: Checking the status of an existing order.

You can check the status at any point during the order life cycle. Enter any data point on the left (Order ID, Loan number, address etc.) and click *Search*. The order will display on the right. To enter the order, click the ID number to view the status history and other key components.

You can also Add a Comment to an order. Any comment added will immediately notify the CA team.

Orders

Home

Order Search

Search

Order ID:

Client:

Loan Number:

Transaction #:

Bwr. Surname:

Address:

City:

Open

Hold

Cancel

Upgrade

Comment

New Order

Export

ID	Client	Loan Number	Loan Type	Loan Purpose	Product	Address	City	State	Borrower	
<input type="checkbox"/> 3328344.1	Test Client	123TEST10.7	CONV	Other	CAP-EXT .1	123 Test St	Glenolden	PA	Jeanette Test	11

Status History

Completed Report and Documents

Instructions

Fee Adjustments

Processed Payments

People

Other Products for this Loan

Order Date:

9/8/2021 at 6:29 AM EDT

Due Date:

9/15/2021 at 6:29 AM EDT

Inspection Appointment:

9/8/2021 at 6:53 AM EDT

Estimated Value:

Undetermined or Not Applicable

Add Comment

Date	Updated By	Description
9/8/2021 6:47 AM EDT	Lisa Stratton	testing comments back to client.
9/8/2021 6:47 AM EDT	Lisa Stratton	Accepted by Vendor
9/8/2021 6:47 AM EDT	Lisa Stratton	Order Assigned
9/8/2021 6:29 AM EDT	System Account	Order Confirmed
9/8/2021 6:29 AM EDT	Lisa Stratton Test	Order Received

### Step 3: Cancel, Put on Hold and Messaging to CA

Edit Order – edit address, contact info etc.

Put on Hold – immediately notifies CA team and order is placed on hold

Request Correction – only available post delivery (revisions, ROV etc.)

Cancel - immediately notifies CA team you wish to cancel

Orders

Home

Order Search

Search

Order ID:

Client: 

All

Loan Number:

Transaction #:

Bwr. Surname:

Open

Hold

Cancel

Upgrade

Comment

New Order

Export

<input type="checkbox"/>	ID	Client	Loan Number	Loan Type	Loan Purpose	Product	Address	City	State	Borrower	
<input type="checkbox"/>	3328344.1	Test Client	123TEST10.7	CONV	Other	CAPI-EXT .1	123 Test St	Glenolden	PA	Jeanette Test	11

Orders

Home > Order Item 3328344.1 ( 123 Test St ) > Dashboard

Order ID: 3328344	Order Date: 10/7/2021	Client: 56135 (Test Client)	Branch: 2527 (TestBranch2)
Loan No.: 123TEST10.7	Borrower: Jeanette Test	Address: 123 Test St Glenolden, PA 19036	County (Region): Delaware (PA)
Purpose: Other	Co-borrower: Not Specified	Loan Type: Conventional	FHA Case No.: Not Specified
Item ID: 1	Order Date: 10/7/2021	Required By Date: 10/10/2021	Issue To: N/A
Product: CAPI-EXT .1	Client Fee: \$0.00	Balance: \$0.00	Transaction No.:
Case File ID:	Property Data ID:		

Edit Order

Put on Hold

Request Correction

Upgrade

Cancel

Status History

Completed Report and Documents

Instructions

Fee Adjustments

Processed Payments

People

Other Products for this Loan

Order Date: 10/7/2021 at 5:47 PM EDT

Due Date: 10/10/2021 at 5:47 PM EDT

Inspection Appointment: Undetermined or Not Applicable

Estimated Value: Undetermined or Not Applicable

Add Comment

Date	Updated By	Description
10/7/2021 5:48 PM EDT	System Account	Order Confirmed
10/7/2021 5:47 PM EDT	Jeanette Mills	Order Received



# Step 4: Viewing Completed Orders

Enter your order identifier. Be sure to uncheck the Only Open Orders box. Enter the order and click on the Completed Reports and Documents tab. View/download any document in the list.

Home

Order Search

Search

Order ID:

Client:

Loan Number:

Transaction #:

Bwr. Surname:

Address:

City:

☐ Only Open Orders

Open

Hold

Cancel

Upgrade

Comment

New Order

ID	Client	Loan Number	Loan Type	Loan Purpose	Product	Address	City	State
<input type="checkbox"/> 3328344.1	Test Client	123TEST10.7	CONV	Other	CAP-EXT .1	123 Test St	Glenoiden	PA

Edit Order

Put on Hold

Request Correction

Upgrade

Cancel

Status History

Completed Report and Documents

Instructions

Fee Adjustments

Processed Payments

People

Other Products for this Loan

The documents listed below are those submitted by the vendor in accordance with the assignment given. Since these documents may contain mistakes identified by internal qu personnel, multiple versions may exist. The version atop the list represents the most current document and the one that will be delivered to the client if approved.

Upload a New Document

	Submitted On	Type	Description
<div><div>Download</div><div>View</div></div>	9/23/2021 1:11 PM EDT	Invoice	
<div><div>Download</div><div>View</div></div>	9/23/2021 1:11 PM EDT	Completed Product (Image)	



**Thank you!**

**If you need any additional assistance, please call or email:**

Client Services

[clientservices@ca-usa.com](mailto:clientservices@ca-usa.com)

888.815.5618 option 2