

Create a Request

YouConnect Home/Support **Requests** View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project Welcome, System

Recently Viewed: Merc LOE AG Borrower 5 Alexander Smith Alexander Sm... Scenario 5 ~... Scenario 4 ~... Scenario 3 ~... Scenario 2 ~... Test 1 - Cut...

Actions: **Create a Request** Multiple Request Tool View Requests Quick Filters

Search Requests

File Number	<input type="text"/>	Customer Name	<input type="text"/>	Portfolio	<input type="text"/>	My Items	<input checked="" type="checkbox"/>
Request Status	<input type="text"/> Submitted <input type="text"/> In Progress <input type="text"/> Not Submitted <input type="text"/> Cancelled <input type="text"/> Complete <input type="text"/> Pending	Request Type	<input type="text"/> Appraisal <input type="text"/> Evaluation <input type="text"/> Review <input type="text"/> Enhanced Index Value Report <input type="text"/> Mean Value Report - (aka MVR) \$305 <input type="text"/> Commercial Evaluation Report - (aka CER) \$	Request Purpose	<input type="text"/> Additional Collateral <input type="text"/> Additional Funding <input type="text"/> Classified Asset <input type="text"/> Construction Inspection <input type="text"/> Construction (w/perm in secondary mkt.) <input type="text"/> Construction (w/perm in primary mkt.)	Exclude Bulk Bids	<input type="checkbox"/>
Property Type Category	-- Select a Category --	Property Type	-- Must Select Property Category First --	Project Number	<input type="text"/>	Request Number	<input type="text"/>

[Advanced Search](#) |
 Saved Searches

List View of Requests

File Number	Customer Name	Portfolio/Project	Property Address	City	Request Type	Request Status	Workflow Stage	Assignment Status	Date of Request	Date Needed	Revised Report Delivery Date	Estimated Total Completion Date	Job Manager	Value As Is	On Hold
<input type="checkbox"/> 8764	Carol Customer	Builders Tact 2312-4957-001	518 N. Tampa Street	Tampa	Appraisal	Submitted	-----	-----	12/11/2023	12/27/2023			Sunda Job Manager		<input type="checkbox"/>
<input type="checkbox"/> 8763	Helen Clark	2105-3595-007	1545 NEW BROOK RD	Waldron	Appraisal	Not Submitted	-----	-----	12/07/2023	12/29/2023			-		<input type="checkbox"/>

Select/Create Property Record

Creating a Request: Step 1 of 5 (Enter in address) If an address already exists in the system, click on the correct address. If not, you will need to create a New Property by selecting the blue button.

The screenshot shows a web form titled "Step 1 of 5: Enter the Property Address". At the top, there is a progress bar with five steps: 1. Start with Property Address (highlighted in blue), 2. Enter/Update Property, 3. Create a Request, 4. Upload Documents, and 5. Finalize. Below the progress bar, the title "Step 1 of 5: Enter the Property Address" is displayed. In the center, there is a text input field containing the number "0". Below the input field, a blue button with the text "Create a New Property - No Existing Matches Found" is highlighted with a yellow background. Underneath the button, there are examples of address formats: "Examples: 123 Main Str, Redwood, CA 94002 or Corner of Main & 1st". In the top right corner, there is a blue link labeled "cancel". In the bottom right corner, there is another blue link labeled "cancel".

✓ Start with Property Address

2 Enter/Update Property

3 Create a Request

4 Upload Documents

5 Finalize

Step 2 of 5: Create a New Property

[back](#)

Save Property

[cancel](#)

Address: 513 Summer Lane

Zip
Code:

City:

State:

County:

Portfolio:

Portfolio Description:

Overview

Property Category:

Property Type:

Lot #:

Subdivision:

STR:

Site Area:

Unit:

Ownership Type:

Flood Zone:

Photo:

Legal Description:

Site Comments:

Building Comments:

Multiple Building
Description:

Building 1
Sq. Footage:
Year Built:
Existing (yes/no):
Proposed (yes/no):
Add and/or Renovation (yes/no):

Building 2

Longitude:

Assigned Area:

Tampa MSA

Bank:

YouConnect Bank

Block:

Parcel #:

Year Built:

Building Size:

Unit:

Owner:

Property Status:

✓ Start with Property Address

2 Enter/Update Property

3 Create a Request

4 Upload Documents

5 Finalize

Step 2 of 5: Review or Edit the Existing Property

[back](#)

Save Property

[cancel](#)

Address:	518 N. Tampa Street		
Zip Code:	33602	City:	Tampa
State:	Florida	County:	Hillsborough
Portfolio:	Builders Tact	<input checked="" type="checkbox"/> View existing portfolio	
Portfolio Description:			

Overview

Property Category:	Single Family Residential	Assigned Area:	Other
Property Type:	Single Family - Attached	Bank:	YouConnect Bank
Lot #:	12	Block:	30
Subdivision:	New Tampa	Parcel #:	Add Parcel 12356
STR:		Year Built:	1954
Site Area:	5.30 Unit: SF	Building Size:	10,000 Unit: SF
Ownership Type:	Owner Occupied	Owner:	Brenda Dohring Hicks & Jeff Hicks
Flood Zone:	A-11	Property Status:	Renovation
Photo:	Browse... No file selected.		
	RW Blog2on.jpg Clear Image: <input type="checkbox"/>		
Legal Description:	1		
Site Comments:	Site is level and above grade, located in downtown Tampa. All public utilities are available.		
Building Comments:	3 story brick building, turn of the century historic building. Renovated in 2014.		
Multiple Building Description:	<div>- Select a Template -</div> <div>Building 1</div> <div>Sq. Footage:</div> <div>Year Built:</div> <div>Existing (yes/no):</div> <div>Proposed (yes/no):</div> <div>Add and/or Renovation (yes/no):</div> <div>Building 2</div>		
Longitude:	-82.45934498	Latitude:	27.94785098

Save Property

[cancel](#)

Verify Mapping Coordinates

✓ Start with Property Address

2 Enter/Update Property

3 Create a Request

4 Upload Documents

5 Finalize

Step 2 of 5: Set Property Coordinates

Reset

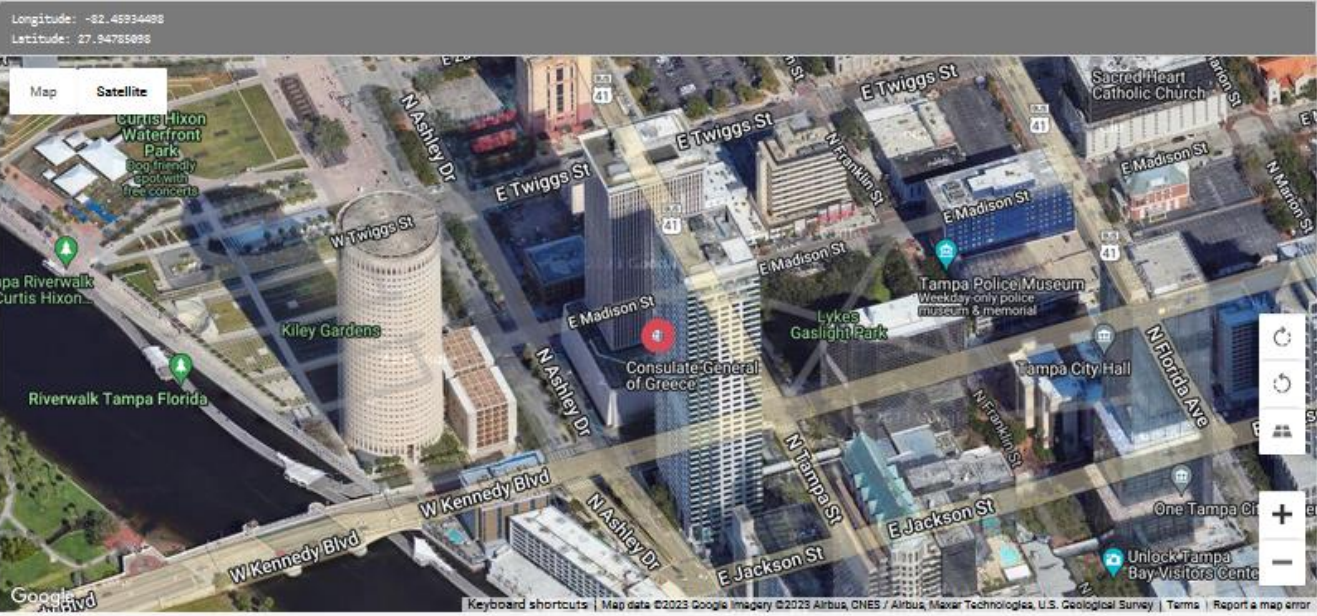
Save Coordinates

cancel

Longitude: -82.45934488
Latitude: 27.94785098

Map

Satellite



Map data ©2023 Google Imagery ©2023 Airbus, CNES / Airbus, Maxar Technologies, U.S. Geological Survey | Terms | Report a map error

Select Request Type(s) and Complete Request Form(s)

Property Saved! All done and don't need to create a request? [Exit to the Request list.](#)

✓ Start with Property Address > ✓ Enter/Update Property > **3 Create a Request** > 4 Upload Documents > 5 Finalize

Step 3 of 5: Create a Request - Select Request Type(s) [back](#) | [exit](#)

Select Request Type(s) *

Appraisal

☐ Appraisal
☐ Evaluation
☐ Review
☐ Validation

Environmental

☐ Environmental

Property: *

Project Number:
(leave blank if this is a new project)

[Continue](#) [cancel](#)

[Continue](#) [cancel](#)

✓ Start with Property Address

✓ Enter/Update Property

3 Create a Request

4 Upload Documents

5 Finalize

Step 3 of 5: Create a Request (Request 1 of 1)

[back](#) | [exit](#)

Save Request

[cancel](#)

Request Type:	Appraisal	Project Number:	
Property:	518 N. Tampa Street		
Request Purpose: *	Additional Funding		
Customer Name: *			
Loan Officer: *			
LO Notifications Copy:			
Date Needed: *			
Loan Amount: *			
Loan #: *			
LTV Ratio:			
Risk Rating: *			
Prior Appraisal Date:	08/16/2021		
Billing/Branch Code: *	040;769		
Lending Group:			
Payment Method:			
Intended Use of Request: *	- Select a Template - YouConnect Bank for Valuations		
Ordering Choices: *	Engage at Discretion		
Ordered By:	System Administrator		
Projected Close Date:			
Loan Type: *			
Prior Loan #:	TBD		
Approved LTV Ratio:			
Risk Grade:			
Prior Appraised Value:	200,000		
GL Acct:	4		
Prepayment Proof:	Browse... No file selected.		
Intended User of Request:	- Select a Template - YouConnect Bank		
HPML:	No		
	Process MUST be in compliance with TILA-HPML Appraisal Rules		
Syndication / Participation:			
Region:			
Number of Reports:			
Request Comments:			

Contact/Access Info

Marketing Status:

Listing Agent:

List Price:

Sale Date:

Contact Name:

Contact Phone:

Listing Phone:

Sale Price:

Contact Email:

Contact Phone 2:

Bid/Engagement (Premise Scenarios)

Desired Delivery Date:

Revised Report
Delivery Date:

Bid Reply Time (Days):

Report Format:

Original Report
Delivery Date:

Rush Job: ☐

Residential Forms:

Market Analysis Level:

Value Scenario(s):

Value Premise

Interest Appraised

Comments

Market Value - As Is

Market Value - Hypothetical

Inspection
Requirements:

Approach To Value: [check all](#) | [uncheck all](#)

- ☐ Cost Approach
☐ Income Capitalization

Occupancy:

Scope of Work
(Premise):

TEST 123

Bid / Engagement
Comments:

Bid Request:

Save Request

[cancel](#)

Upload Request Documents

✓ Start with Property Address

✓ Enter/Update Property

✓ Create a Request

4 Upload Documents

5 Finalize

Step 4 of 5: Upload Request Documents

Please **DO NOT** click on the back arrow in your browser to make edits to the Property Record or Order Forms, this will create duplicate orders. Proceed to the next step and "Save Draft and Submit All Later", if further edits are needed.



Drag files here or [browse for files](#)

RENT ROLL.pdf

Rent Roll

Remove

Once the document(s) has been uploaded, select the document type name from the dropdown values provided by client.

Required Documents

Save & Next

Submit or Save Draft for Later

✓ Start with Property Address > ✓ Enter/Update Property > ✓ Create a Request > ✓ Upload Documents > **5 Finalize**

Step 5 of 5: Finalize

Project/Portfolio Mode: Builders Tact

Your Requests have been created. Would you like to submit all of the Requests now or later?

Submit All Now

Submit All Now- The order will go to the Appraisal Dept.

Save Draft and Submit All Later

Save Draft and Submit All Later- This order will remain in the Not Submitted status in the list view. No JM /Appraisal Dept. will not be notified of this order until it has been submitted.

Ready to be initiated:

- File 8764: 518 N. Tampa Street Tampa, FL

JM Accept or Reject Request

YouConnect Home/Support **Requests** View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project Welcome, System

Recently Viewed: Carol Customer Merc LOE AG Borrower 5 Alexander Smith Alexander Sm... Scenario 5 ... Scenario 4 ... Scenario 3 ...

Actions: Create a Request Multiple Request Tool View Requests Quick Filters

Edit Dept Notes **Accept** **Reject Request** Jump to: -none-

File # 8764 | Carol Customer | Builders Tact | (2312-4957-00)

Request Info		Property Information	
File Number:	8764	Project Number:	2312-4957 (001)
Request Status:	Submitted	Portfolio:	Builders Tact
Workflow Stage:		Property:	518 N. Tampa Street
Assignment Status:		Request Purpose:	Additional Funding
Request Type:	Appraisal	Ordering Choices:	Engage at Discretion
Customer Name:	Carol Customer	Ordered By:	System Administrator
Loan Officer:	LO Wild	Submitted Date:	12/11/2023
LO Notifications Copy:		Projected Close Date:	
Date of Request:	12/11/2023		
Date Needed:	12/27/2023		


Property Information









[View more property info](#) [View Map](#)


Property Category: Single Family Residential
 Property Type: Single Family - Attached
 Property Address: 518 N. Tampa Street
 Zip Code: 33602
 City: Tampa
 State: Florida
 County: Hillsborough
 Subdivision: New Tampa
 Ownership Type: Owner Occupied

Upcoming Requests

Solicit Bids from Vendors

 Home/Support **Requests** View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project



Recently Viewed:  Carol Customer  Merc LOE  AG Borrower 5  Alexander Smith  Alexander Sm...  Scenario 5 -...  Scenario 4 -...  Scenario 3 -...


Actions:  **Create a Request** * Multiple Request Tool * View Requests * Quick Filters ▾

Edit ▾ Dept Notes **Vendor Solicitation** Order Integration









Jump to:


Request Info

File Number:	8764	Project Number:	2312-4957 (001)
Request Status:	In Progress	Portfolio:	Builders Tact
Workflow Stage:	Vendor Selection	Property:	518 N. Tampa Street
Assignment Status:			
Request Type:	Appraisal	Request Purpose:	Additional Funding
Customer Name:	Carol Customer	Ordering Choices:	Engage at Discretion
Loan Officer:	LO Wild 	Ordered By:	System Administrator 



Home/SupportRequestsView/Edit PropertiesVendorsCompsReport SummariesReportsPortfolio/Project

Recently Viewed:  Carol Customer  Merc LOE  AG Borrower 5  Alexander Smith  Alexander Sm...  Scenario 5 -...  Scenario 4 -...  Scenario 3 -...

Actions:  Create a Request * Multiple Request Tool * View Requests * Quick Filters ▾

Request TypeAppraisal

Comments for Vendor(s)

I want to...


☐ a) Send to vendors (Vendors bid both time and fee)

☐ b) Set the due date and send to vendors (Vendors bid the fee)

☐ c) Set the fee and send to vendors (Vendors bid the time)









☐ d) Set the due date, fee, and send to a SINGLE vendor (Direct Engagement)





Options for Vendor Solicitation



Home/SupportRequestsView/Edit PropertiesVendorsCompsReport SummariesReportsPortfolio/Project

Welcome, System ▾

Recently Viewed:  Carol Customer  Merc LOE  AG Borrower 5  Alexander Smith  Alexander Sm...  Scenario 5 -...  Scenario 4 -...  Scenario 3 -...

Actions:  Create Vendor *  View Vendors *  Create From vCard *  Import Vendors

Select Bid(s)

Within

20 miles ▾

Status

ApprovedPendingTemporary Approval

State

AlaskaAlabamaArkansasArizonaCaliforniaColorado

City

State License

AlaskaAlabamaArkansasArizonaCaliforniaColorado

of Property

518 N. Tampa Street
Tampa, FL 33602

Type

AppraisalEnvironmentalBroker

Subregion

Region ARegion B

County

Name

Property Types

CommercialResidentialGas Station

Region

Subregion ASubregion B

National

▾

Company

Designations

MAIMRICESSRASREASRPAAI-GRS

License #

Search

Clear

Send Solicitation

View Map

Selected: 2

(1 - 2 of 2)

Engage Vendor

Vendor Bid Response Once the vendors submitted a bid (status of Received), you can select the bid you like or send to the LO for Bid Slection.

Vendor	Discussion Comments	Vendor Grade	View Summary	Bid Date	Status	Expected Delivery	Fee Quote	Total Fee	Biz Days	Display to LO	
Barbara Reviewer Phelos	[i]		View	12/12/2023 04:11pm	Received	12/21/2023 (if engaged today)	\$2,781.00 (includes addt 3.00% fee)	\$3,031.00	7	<input checked="" type="checkbox"/>	recommend email select bid edit
Assen Gue Test Vendor - Multi Address	[i]		View	12/12/2023 04:11pm	Received	12/22/2023 (if engaged today)	\$2,575.00 (includes addt 3.00% fee)	\$2,825.00	8	<input checked="" type="checkbox"/>	recommend email select bid edit

YOUCONNECT Home/Support **Requests** View/Edit Properties Vendors Comps Report Summaries

Recently Viewed: [Helen Clark](#) [Bid Solicita...](#) [Bid Solicita...](#) [Bid Solicita...](#) [Bid Solicita...](#) [Carol Customer](#) [Bid Solicita...](#) [Bid Solicita...](#)

Actions: [Create a Request](#) * [Multiple Request Tool](#) * [View Requests](#) * [Quick Filters](#)

[Edit](#) [Dept Notes](#) [Vendor Solicitation](#) **[LO Bid Selection](#)** [Cancel Solicitation](#) [Send Bulk Bid](#) [Order Integration](#) [Go to Project](#) [Jump to:](#)

Vendor Bid Response

LO Bid Selection button will send the LO bids to select from.

Vendor Bid Response Once the bid has been selected, the status will change to Selected

Vendor	Discussion Comments	Vendor Grade	View Summary	Bid Date	Status	Expected Delivery	Fee Quote	Total Fee	Biz Days	Display to LO	
Barbara Reviewer Phelos	[i]		View	12/11/2023 02:28pm	Selected	12/26/2023 (if engaged today)	\$3,296.00 (includes addt 3.00% fee)	\$4,046.00	10	<input checked="" type="checkbox"/>	recommend email edit
Assen Gue Test Vendor - Multi Address	[i]		View	12/11/2023 02:28pm	Received	12/21/2023 (if engaged today)	\$3,605.00 (includes addt 3.00% fee)	\$4,355.00	8	<input checked="" type="checkbox"/>	recommend email select bid edit

Vendor Bid Response Once the vendor confirms, the status will update to Engaged.

Vendor	Discussion Comments	Vendor Grade	View Summary	Bid Date	Status	Expected Delivery	Fee Quote	Total Fee	Biz Days	Display to LO	
Barbara Reviewer Phelos	[i]		View	12/11/2023 02:28pm	Engaged	12/26/2023	\$3,296.00 (includes addt 3.00% fee)	\$4,046.00	10	<input checked="" type="checkbox"/>	recommend email edit
Assen Gue Test Vendor - Multi Address	[i]		View	12/11/2023 02:28pm	Rejected	12/21/2023	\$3,605.00 (includes addt 3.00% fee)	\$4,355.00	8	<input checked="" type="checkbox"/>	recommend email edit

Accept for Review

Home/Support
Requests
View/Edit Properties
Vendors
Comps
Report Summaries
Reports
Portfolio/Project

Recently Viewed:
 Carol Customer
 Engagement L...
 Bid Selected...
 Helen Clark
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...

Actions:
 Create a Request
 * Multiple Request Tool
 * View Requests
 * Quick Filters

Edit
 Dept Notes
 Accept for Review
 Send for Review
 Assign Internal Review
 No Review Needed
 Jump to: -none-

Request Info

File

Request

Workflow Stage: Vendor Complete

Assignment Status: Assignment Complete

Request Type: Appraisal

Customer Name: Carol Customer

Project Number: [2312-4957 \(001\)](#)

Portfolio: Builders Tact

Property: [518 N. Tampa Street](#)

Request Purpose: Additional Funding

Ordering Choices: Engage at Discretion

"Accept for Review" moves the Request into a review mode. It does not indicate that the uploaded vendor report has been accepted. (A JM should select Accept for Review when they will be the assigned Reviewer)

Send for Review

Home/Support
Requests
View/Edit Properties
Vendors
Comps
Report Summaries
Reports
Portfolio/Project

Recently Viewed:
 Carol Customer
 Engagement L...
 Bid Selected...
 Helen Clark
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...
 Bid Solicita...

Actions:
 Create a Request
 * Multiple Request Tool
 * View Requests
 * Quick Filters

Edit
 Dept Notes
 Accept for Review
 Send for Review
 Assign Internal Review
 No Review Needed
 Jump to: -none-

Request Info

Workflow Stage: Vendor Complete

Assignment Status: Assignment Complete

Request Type: Appraisal

Customer Name: Carol Customer

Loan Officer: LO Wild

Project Number: [2312-4957 \(001\)](#)

Portfolio: Builders Tact

Property: [518 N. Tampa Street](#)

Request Purpose: Additional Funding

Ordering Choices: Engage at Discretion

Ordered By: System Administrator

"Send for Review" to solicit review bids from either an internal or external Review vendor

Assign Internal Review

YouCONNECT Home/Support Requests View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project

Recently Viewed: Carol Customer Engagement L... Bid Selected... Helen Clark Bid Solicita... Bid Solicita... Bid Solicita... Bid Solicita... Bid Solicita...

Actions: Create a Request * Multiple Request Tool * View Requests * Quick Filters ▾

Edit ▾ Dept Notes Accept for Review Send for Review **Assign Internal Review** No Review Needed Jump to: -none- ▾

Request Info

File Number: 8

Request Status: In

Workflow Stage: Vendor Complete

Assignment Status: Assignment Complete

Request Type: Appraisal

Project Number: [2312-4957 \(001\)](#)

Portfolio: Builders Tact

Property: [518 N. Tampa Street](#)

Request Purpose: Additional Funding

"Assign Internal Review" to assign Review to an internal Reviewer, typically another JM

No Review Needed

YouCONNECT Home/Support Requests View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project

Recently Viewed: Carol Customer Engagement L... Bid Selected... Helen Clark Bid Solicita... Bid Solicita... Bid Solicita... Bid Solicita... Bid Solicita...

Actions: Create a Request * Multiple Request Tool * View Requests * Quick Filters ▾

Edit ▾ Dept Notes Accept for Review Send for Review Assign Internal Review **No Review Needed** Jump to: -none- ▾

Request Info

File Number: 8764

Request Status: In Progress

Workflow Stage: Vendor Complete

Assignment Status: Assignment Complete

Request Type: Appraisal

Project Number: [2312-4957 \(001\)](#)

Portfolio: Builders Tact

Property: [518 N. Tampa Street](#)

Request Purpose: Additional Funding

Request Vendor Corrections

Report Submission

Report Upload: [REPORT.pdf](#) (27.69kB) [Ask for Vendor Corrections](#)


[Reupload Report](#)
Have vendor reupload the report











☒ Not Viewable ☐ Viewable by the Loan Officer


Vendor Invoice Date:

Vendor Pymt Due Date:

Review Complete

 Home/Support **Requests** View/Edit Properties Vendors Comps Report Summaries Reports Portfolio/Project

Recently Viewed:  Carol Customer  Engagement L...  Bid Selected...  Helen Clark  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...


Actions:  **Create a Request** * Multiple Request Tool * View Requests * Quick Filters ▾











[Edit ▾](#) [Dept Notes](#) **[Review Complete](#)** [Send for Review](#) [Assign Internal Review](#) [Cancel Review](#) [Report Summary](#) Jump to:


Request Info

File Number:	8764	Project Number:	2312-4957(001)
Request Status:	In Progress	Portfolio:	Builders Tact
Workflow Stage:	Review	Property:	518 N. Tampa Street
Assignment Status:	Accepted		
Request Type:	Appraisal	Request Purpose:	Additional Funding

Request Complete

Home/SupportRequestsView/Edit PropertiesVendorsCompsReport SummariesReportsPortfolio/Project

Recently Viewed:  Carol Customer  Engagement L...  Bid Selected...  Helen Clark  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...  Bid Solicita...

Actions:  Create a Request * Multiple Request Tool * View Requests * Quick Filters ▾

Edit ▾

Dept Notes

Request Complete

Review Approval

Jump to:

Request Info

File Number:	8764	Project Number:	2312-4957 (001)
Request Status:	In Progress	Portfolio:	Builders Tact
Workflow Stage:	Review	Property:	518 N. Tampa Street