



Standardized XML Training



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WHAT IS IT?

Valuation Support Services is embarking on a new delivery method that will revolutionize the appraisal industry. The Standard XML project is a delivery process that streamlines appraisal delivery back through Valuation Support Services. The key benefits to this project are:

- The PDF is generated on your side. Therefore, what you send is what the client gets.
- No conversion software is required. You will be able to transmit to any VSS business partner directly through your current appraisal desktop software.
- Creation of an industry standard (MISMO) that may be adopted by your major clients and customers in the near future.
- Client rules are run in the validation process. This minimizes the phone calls after you have already delivered requesting corrections or further commentary.
- Decreasing turn times by creating universal delivery process for all appraisers regardless of what software vendor they are using.
- Increase appraisal quality to Valuation Support Services clients.

Valuation Support Services is excited to offer this new delivery process to our appraisal partners as an expanded benefit to doing business with the business partners on the Valuation Support Services platform.

WHAT DO I NEED?

Contact your software provider to get the latest update that includes the Valuation Support Services Standard XML package.

With this package, no other conversion tools or applications are needed.

Getting Started

FIRST TIME LOG IN

You will receive an email that provides you with a temporary user id and password. (Note: Information below is for illustrative purposes only. The user ID, password, and URL you receive will be different.)

From: DoNotReply@valuationsupportservices.com [mailto:DoNotReply@valuationsupportservices.com]
Sent: Tuesday, March 04, 2008 3:48 PM
To:
Subject: Valuation Support Services, eWeb Services

As part of the Valuation Support eWeb Services, you will need a user id and password. Below, please find your temporary user ID and password.

Your UserName is: xxxxx

Your Password is: 123456

Please click the following link. This will take you directory to the page for you to update your user id and password. Please make this unique to you.

<https://vss20testurl.com/>

Click on the link provided in the email. You will be redirected to the Home Page of the Valuation Support Services website for log in. Use the temporary user ID and password supplied in the email. Click on Log in button.

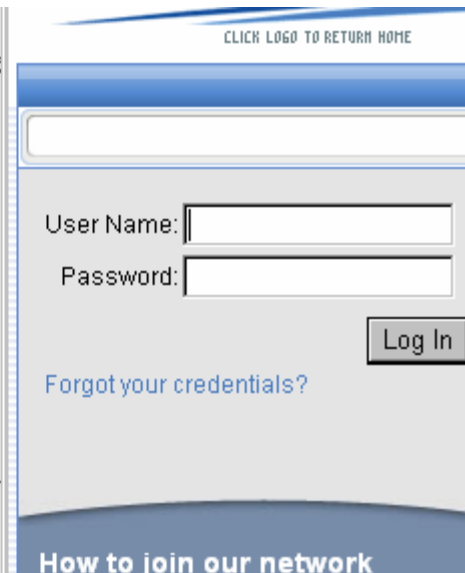
As part of the Valuation Support e

Your UserName is: xxxxx

Your Password is: 123456

Please click the following link. Th

<https://vss20testurl.com/>



Getting Started

FIRST TIME LOG IN

A new page called Change Password will display. This is where you will create an exclusive user name and password.

This user name and password you establish are unique to you. Please remember that the user name and password is what you will use to log into the Valuation Support Services website as well as other services offered by Valuation Support Services. Representatives of Valuation Support Services will not have access to the user name and password you select. Therefore, when creating this user name / password combination, please make sure it is something you will remember.



Wednesday, March 05, 20

Active User: 445

[Order Manger](#)[My VSS](#)[Knowledge](#)

Change password

Your password has expired, provide a new password and change the other information as needed. A confirmation e-mail will be send after the update.

User Name:	<input type="text"/>
E-mail:	<input type="text"/>
Security Question:	<input type="text" value="your pets name?"/> ▼
Security Answer:	<input type="text"/> *
Current Password:	<input type="text"/> *
New Password:	<input type="text"/> *
Confirm Password:	<input type="text"/>
<input type="button" value="Update"/>	

To update your account follow the next steps:

1. Change your User Name as needed.
2. Enter a security question.
3. Enter a security answer.
4. Enter your current password.
5. Enter your new password and confirmation password (Both passwords must match).
6. Click the Update Button.

Note: If you Update your User Name you will be redirected to the log in page, and you will have to log in with the new account that you just updated.

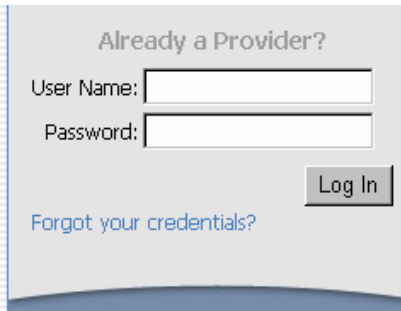
To complete the creation of your Valuation Support Services profile, follow the 6 step instructions on the right side of the page. Note: For Step 4, your current password can be found in the email that you received (see previous page).

Once you have Updated the information, you will be redirected to the Home page of the Valuation Support Services website. Please use the user name and password you just created to log in.

Getting Started

FORGOT YOUR CREDENTIALS

In the event that you forget your credentials (user name and password), you may click on the **Forgot Your Credentials?** Link on the Valuation Support Services Home page.



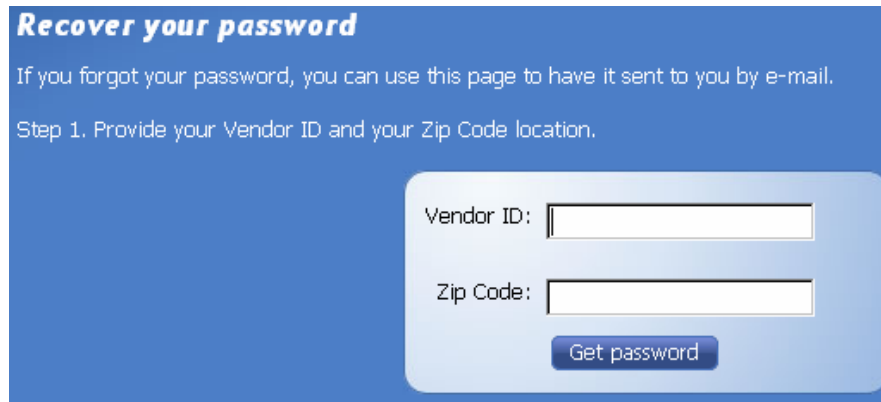
Already a Provider?

User Name:

Password:

[Forgot your credentials?](#)

By clicking on this link, you will be required to enter in your Vendor ID and your zip code. If you experience any issues or do not know these two pieces of information please call 877-352-4650, Option 3.



Recover your password

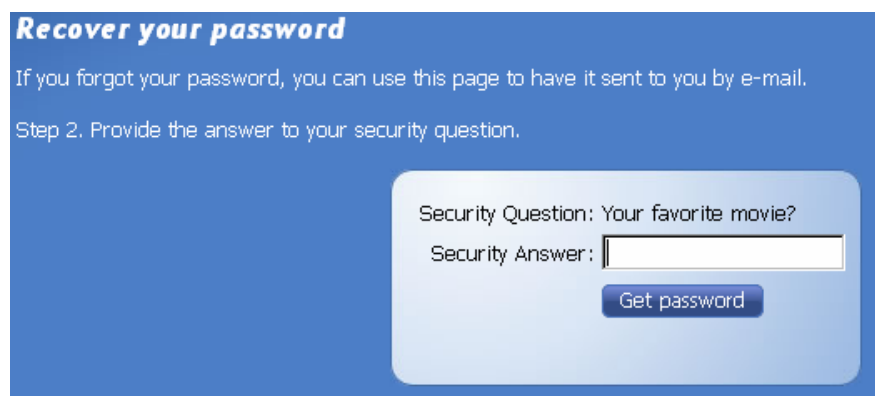
If you forgot your password, you can use this page to have it sent to you by e-mail.

Step 1. Provide your Vendor ID and your Zip Code location.

Vendor ID:

Zip Code:

Enter your Vendor ID and zip code. Click on Get password. You will be given your security question and required to provide your security answer.



Recover your password

If you forgot your password, you can use this page to have it sent to you by e-mail.

Step 2. Provide the answer to your security question.

Security Question: Your favorite movie?

Security Answer:

Getting Started

FORGOT YOUR CREDENTIALS

Click on Get password. The page will refresh indicating that your information has been sent and what email address it was sent to.


Recover your password

If you forgot your password, you can use this page to have it sent to you by e-mail.

An E-mail with your credentials has been sent to [redacted]. If you don't see your password reminder email in your inbox, make sure to check your spam folder.

[Back to login page](#)


You will receive an email from Valuation Support Services that includes your temporary user name and password.

From:  DoNotReply@valuationsupportservices.com
To: [redacted]
Cc:
Subject: Valuation Support Services, Credential recovery

Your UserName is: User875eb19b

Your Password is: ?R3+dDY\$

Go to the Valuation Support Services home page and log in using the temporary user name and password from the email. This will take you to the My Credentials page. You will be required to set up your user name and password again and security question again. You will receive a confirmation email that your information has been updated.

Wednesday, March 05, 20
Active User: 445

[Order Manger](#)[My VSS](#)[Knowledge](#)

Change password

Your password has expired, provide a new password and change the other information as needed. A confirmation e-mail will be send after the update.

User Name:

E-mail:

Security Question:

Security Answer:

Current Password:

New Password:

Confirm Password:

To update your account follow the next steps:

1. Change your User Name as needed.
2. Enter a security question.
3. Enter a security answer.
4. Enter your current password.
5. Enter your new password and confirmation password (Both passwords must match).
6. Click the Update Button.

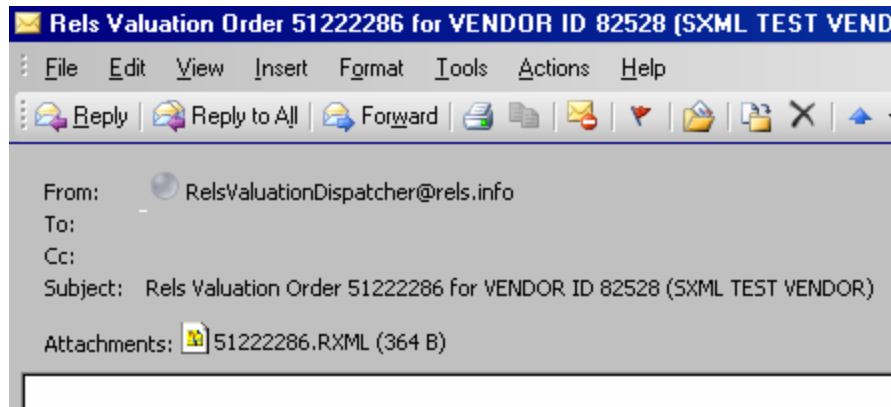
Note: If you Update your User Name you will be redirected to the log in page, and you will have to log in with the new account that you just updated.

New Order Request

RECEIVING A NEW ORDER REQUEST

As new orders get assigned to you, the order request will be emailed to the email address listed in your Valuation Support Services profile.

You will receive the email in your Inbox. Open the email. The email will be from the Valuation Support Services business partner email address. The subject line will indicate the order number and your vendor ID and name.



Double-click on the Attachment. This will open the order request in your appraisal software. You will be required to authenticate yourself by using your vendor ID and the unique user name and password you created in the First Time Login section. Click OK. The system will ensure the vendor ID, UserID and Password entered match the appraiser assigned the order.

A screenshot of a dialog box titled "Enter Your VSS Authentication Information". It contains three input fields: "Vendor ID" with the value "82501", "User ID" with the value "82501", and "User Password" with masked characters "xxxxxx". There are "OK" and "Cancel" buttons on the right side of the dialog.

Note: It is very important that you remember your Vendor ID, User ID (unique user name) and Password to authenticate that the correct vendor is accessing the order information. Please keep the unique User ID (user name) and Password in a safe place.

New Order Request

RECEIVING A NEW ORDER REQUEST

The order will open in your appraisal software.



Unregistered Company Name
 Rels Valuation
 8009 34th Ave South
 Bloomington, MN 55425
 Phone Fax

File No.
 Case No.

Accept / Decline

Append Template

Append Appraisal

PROPERTY INFORMATION		ORDER INFORMATION	
Address	9481625 Good Ave	Order No.	51222286
City	MINNEAPOLIS State MN Zip 55402	Received	
County	Hennepin	Due Date	5/6/2008 10:22 AM CST Rush <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Property Type	04/30/08 2:40 PM	Product	1004 URAR/Single Family \$ 100
Legal Description	5162....CONV/CONFORMING....CONV....10/1 LIBOR	Addendum	Market Conditions Summary \$
Building Status	Existing Year Built 1985		\$
Occupancy Status	OwnerOccupied		\$
Estimated Value	Sales Price 563,513		\$
		Total Fees	\$ 100
LOAN INFORMATION		CLIENT INFORMATION	
Loan No.	0119233179 FHA Case #	This is the client name that should appear in your report. Please have your report reflect this name:	
Loan Type	Conventional	Name	Wells Fargo Bank, N.A. - 034363
Loan Purpose	Purchase	Client Contact	WELLS FARGO
Loan Amount		City	URBANDALE State IA Zip 50322
Borrower	TESTCO CLIFFORD	Phone	5151112222 Fax
Co-Borrower			

The order will contain all information necessary to fulfill the assignment request including


- Property address
- Product requested and any addendums
- Contracted fees
- Loan information
- Client information
- Property access information
- Guidelines/requirements on individual assignment

You will be required to Acknowledge the order before you will be allowed to close the software.

Acknowledge Order

ACKNOWLEDGING A NEW ORDER REQUEST

In your software, you will see a link to acknowledge the order. In the example below, it is the Accept / Decline button. Click on that button and you will be transported to the Acknowledgement page on the Valuation Support Services website for that order.





		Unregistered Company Name Rels Valuation 8009 34th Ave South Bloomington, MN 55425 Phone _____ Fax _____	File No. _____ Case No. _____ Accept / Decline Append Template Append Appraisal
---	--	--	---


PROPERTY INFORMATION		ORDER INFORMATION	
Address 9481625 Good Ave		Order No.	51222286
City MINNEAPOLIS State MN Zip 55402		Received	
County Hennepin		Due Date	5/6/2008 10:22 AM CST Rush <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Property Type 04/30/08 2:40 PM		Product	1004 URAR/Single Family \$ 100
Legal Description 5162....CONV/CONFORMING....CONV....10/1 LIBOR		Addendum	Market Conditions Summary \$
Building Status Existing Year Built 1985			\$
Occupancy Status OwnerOccupied			\$
Estimated Value _____ Sales Price 563,513			\$
Total Fees			\$ 100




LOAN INFORMATION		CLIENT INFORMATION	
Loan No.	0119233179	FHA Case #	
Loan Type	Conventional		
Loan Purpose	Purchase		
Loan Amount			
Borrower	TESTCO CLIFFORD		
Co-Borrower			
This is the client name that should appear in your report. Please have your report reflect this name:		Name Wells Fargo Bank, N.A. - 034363	
Client Contact		WELLS FARGO	
City URBANDALE		State	IA Zip 50322
Phone 5151112222		Fax	

Tracking #: 51222286

Address	Due date and time	Loan Number	Borrower Last Name
9481625 Good Ave, MINNEAPOLIS, MN	5/6/2008 10:22:13 AM	0119233179	TESTCO

Inspection Date <input type="text"/>  <input type="text"/> 	Estimated Due Date <input type="text"/>  <input type="text"/> 	Order Acknowledgement: <div style="border: 1px solid black; height: 50px;"></div>
Predefined Comment: Select a comment ...		If decline, select reason: Select a decline reason ...
Custom Comment: <div style="border: 1px solid black; height: 50px;"></div>		



Enter any acknowledgement text and select the Accept, Accept with Conditions or Decline. If you decline, you will be required to enter text and select a reason.

Creating A Report

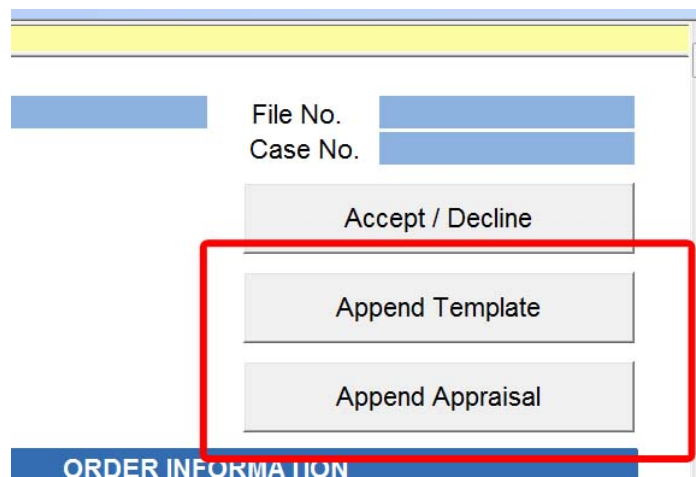
CREATING REPORT FROM AN ORDER FORM

The ClickForms software requires that the VSS Order be added to the report in order to be transmitted back to VSS. There are two methods to attach the report to the order:

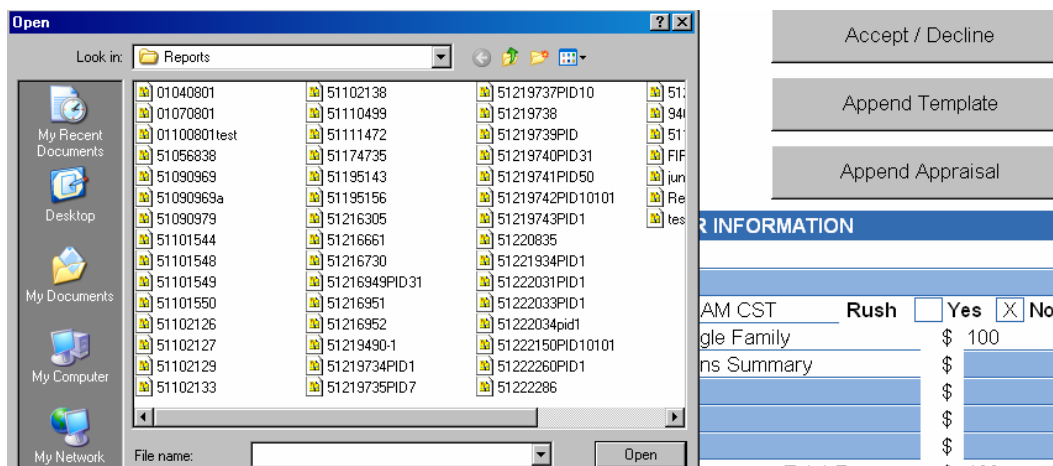
- Append Appraisal
- Append Template

CREATING REPORT FROM AN ORDER FORM — APPEND APPRAISAL

The Append Appraisal feature will allow you to add an already created report to the order form. After you have acknowledged the order, select the Append Appraisal button directly on the order form.



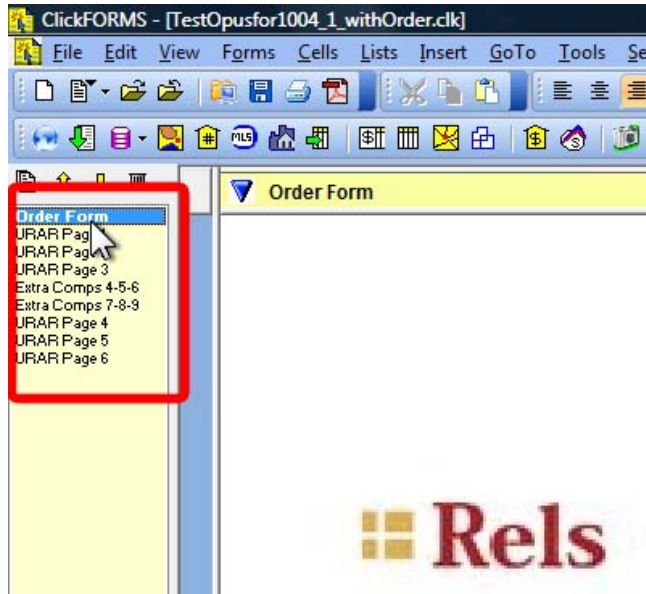
A window will appear for you to select which appraisal report to append to the VSS order. Select the existing report you would like to append to the new VSS order. Once select, click on the Open button.



Creating A Report

CREATING REPORT FROM AN ORDER FORM — APPEND APPRAISAL

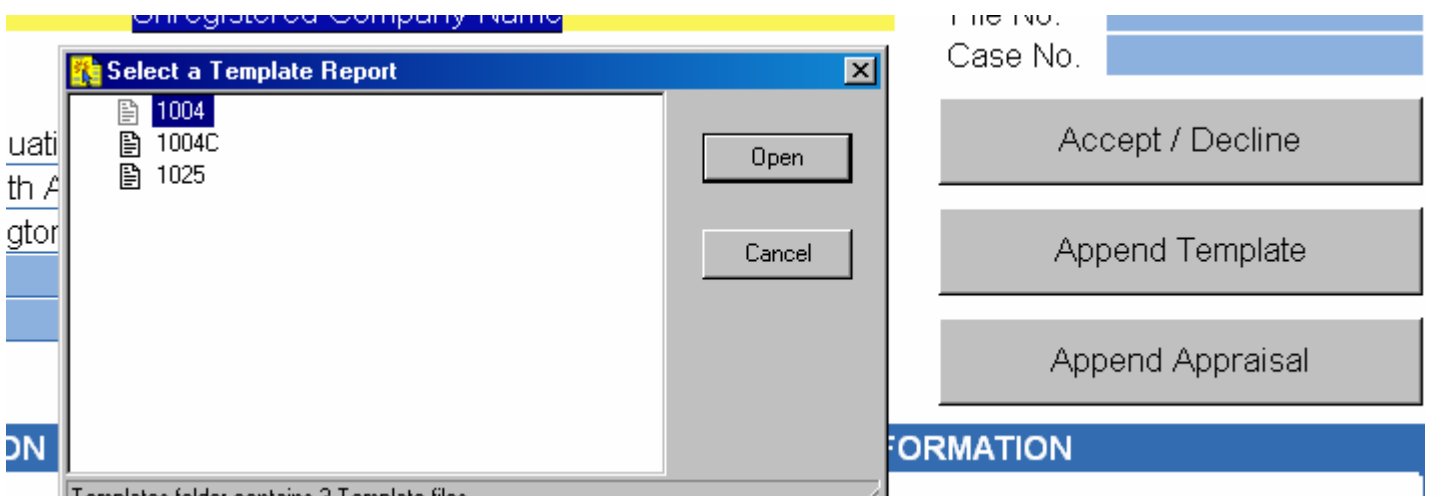
You will see the report merged in with the new order form. Click the Save icon in your toolbar. (or click “File”, “Save”).



CREATING REPORT FROM AN ORDER FORM — APPEND TEMPLATE

You may add a template to the VSS order form by selecting the Append Template button on the VSS order form.

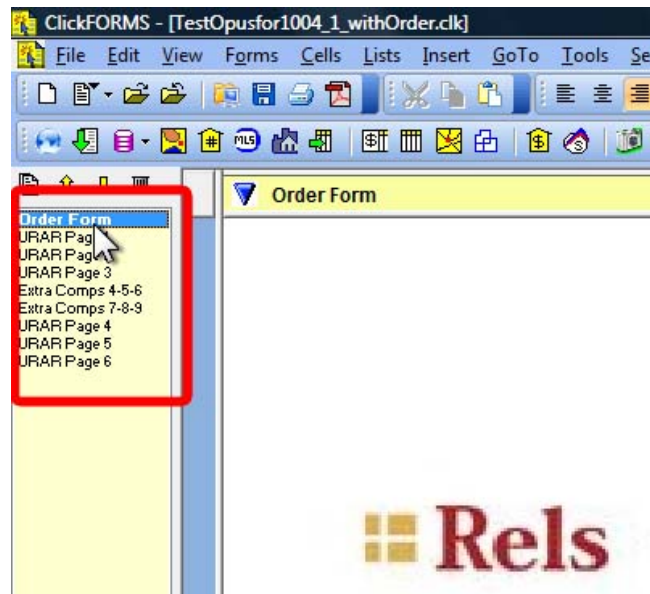
All templates will appear. Select on the template you want to use and select Open.



Creating A Report

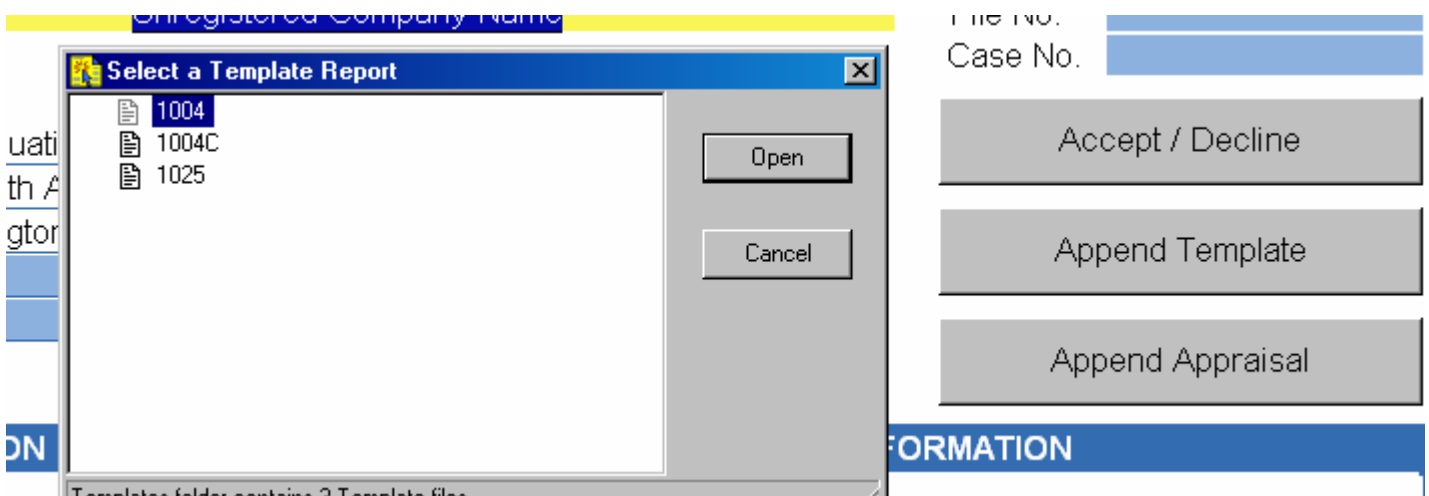
CREATING REPORT FROM AN ORDER FORM — APPEND TEMPLATE

You will now see the Report Forms Merged and the Order Information populated into the Reports Forms.



QUICK TIP: CREATING A TEMPLATE

Templates allow you to quickly add the proper forms based on the order request. To create a new template, Open a new Container and add the appropriate forms from the Forms Library. This would include the main form, certification page, photo pages, location map, sketch. Once you have all of the “normal” forms that would be included in a report, select File, Save as Template. Name the template that is descriptive enough for you to determine which template to use for re-



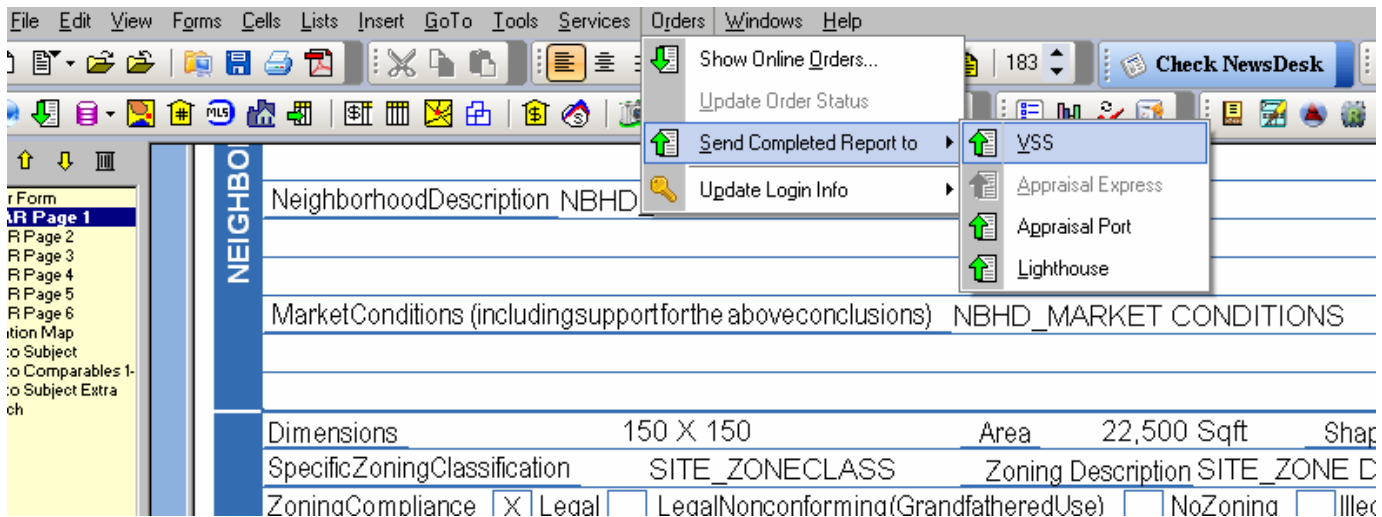
port request type.

STANDARDIZED XML

REVIEW PROCESS

Once the appraisal form is complete, the form will be checked for errors. The following screen shots will walk you through the process to submit the report and show you what it looks like when rules fire.

From the Standard Toolbar Choose **Orders**, **Send Completed Report to**, **VSS** as highlighted below.



The following window will appear. Fill in the Confirm Order No. box with the order number and the Confirm Appraiser ID box with your Appraiser ID. Double check to ensure that the information is correct.

Click on **No** or **Yes** to answer the undue influence question. Once you fill in the information, the Review button will be activated.

A screenshot of a dialog box titled 'Send Appraisal Report to VSS'. At the top are three buttons: Review, Validate XML, and Send. Below these is a section titled 'Order Information' containing the following fields: Order No. (51222260), Received (04/29/08), Due (05/06/08), Property (.), Confirm Order No. (empty text box), and Confirm Appraiser ID (empty text box). At the bottom is a question: 'Was any attempt made by the lender to place undue influence on the appraiser?' with radio buttons for 'No' and 'Yes'. A 'Continue' button is located to the right of the question.

STANDARDIZED XML

REVIEW PROCESS

If a **Yes** answer to undue influence is indicated, a text box will come up for further explanation. An elaboration of the attempt to place undue influence must be filled out before submission. Once the text box is complete (1), click the **Continue** button (2).

Order Information

Order No.: 51222259 Confirm Order No.: 51222259
Received: 04/29/08 Confirm Appraiser ID: 82528
Due: 05/02/08
Property: , ,

Was any attempt made by the lender to place undue influence on the appraiser?

☐ No ☒ Yes

Continue

If yes, please elaborate on the attempt to place undue influence on the appraiser

The loan officer specified the final value he needed the appraisal to reflect to write the loan.

If a **No** answer to undue influence is indicated (or the above Yes answer is satisfied and continue is clicked) another screen appears.

Ensure that all appraisal form pages are checked.

Click the **Review** button to view any critical errors or warnings found within the form.

Specify Report Forms

Include	Report Form Name
<input type="checkbox"/>	Order Form
<input checked="" type="checkbox"/>	FNMA 1004
<input checked="" type="checkbox"/>	FNMA 1004 Certification
<input checked="" type="checkbox"/>	Location Map
<input checked="" type="checkbox"/>	Photo Subject
<input checked="" type="checkbox"/>	Photo Comparables 1-2-3
<input checked="" type="checkbox"/>	Photo Subject Extra
<input checked="" type="checkbox"/>	Sketch

STANDARDIZED XML

REVIEW PROCESS

Your software will have review rules included in the process. These rules are to confirm that all boxes are filled in, no more than one box is checked, dates are in correct format, etc. You must complete this Review prior to being able to move to the Validation process.

Your software will identify Critical Errors or Warnings. Any critical errors are required to be resolved prior to the Validation process. These will be identified in Red. By clicking on the **Locate** button, your software will transfer you to the field that has been flagged in the report.

The screenshot shows a dialog box titled "Send Appraisal Report to VSS". It has a blue title bar with a close button. Below the title bar are four buttons: "Review", "Validate XML", "Send", and "Close". Below these buttons are two tabs: "Order Information" and "Specify Report Forms". A green status bar with red text reads "0 Critical Error(s) and 2 Warning(s) were generated". To the right of this bar is a "Continue" button. Below the status bar is a table with the following data:

Form	Page	Cell	Error Message	Locate
FNMA 1004	2	45	CONTRACT PRICE: Above the Opinion of Market Value	...
FNMA 1004	2	126	ADVERSE SITE: Comments required.	...

If **0 Critical Error(s)** are generated, click on **Continue**. The **Validate XML** button will be active. Click on the **Validate XML** button.

The screenshot shows the same dialog box as before, but the "Validate XML" button is now highlighted with a black border, indicating it is active. The "Continue" button is no longer visible. The table below the tabs is empty.

Form	Page	Cell	Error Message	Locate
------	------	------	---------------	--------

The system will send the appraisal data to Valuation Support Services for validation.

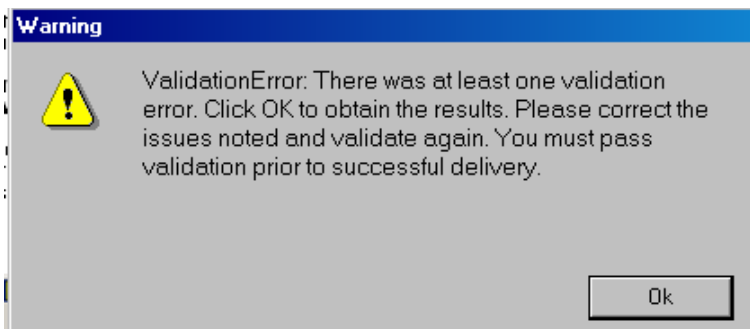
STANDARDIZED XML

VALIDATION PROCESS

Upon return, there are three possible scenarios:

1. Errors exist: these will need to be corrected and successfully validated again to continue. The validation text will appear in red as:

ValidationError: There was at least one validation error



If Errors are noted, a pop up will display indicating Validation Errors exist. This pop up box will not appear if only Warnings are present.

2. Warnings exist: these are warnings for you to review. These do not require correction. It is recommended that you review these warnings to ensure quality and completeness. The validation text will appear in yellow.

Warning: There was at least one validation warning

1. No Errors or Warnings exist. This means your report is ready to be successfully delivered to Valuation Support Services. The validation text will appear in Green.

Congratulations. Your report has been successfully validated.

A combination of Errors and Warnings can exist. The Errors require resolution before moving to the next step in delivery to VSS.

STANDARDIZED XML

VALIDATION PROCESS

The errors appear as follows. Note that the section of the form as well as the description of the error will appear. By clicking on the Locate button, the system will take you to the section of the report where the error exists.

The screenshot shows a software window titled "Send Appraisal Report to RELS". At the top, there are three buttons: "Validate XML", "Send", and "Close". Below these are three tabs: "Order Information", "Specify Report Forms", and "Validation Errors". The "Validation Errors" tab is selected, displaying a red message bar that reads "ValidationError: There was at least one validation error" with a "Continue" button to its right. Below the message bar is a table with four columns: "Type", "Form Section", "Description", and "Locate".

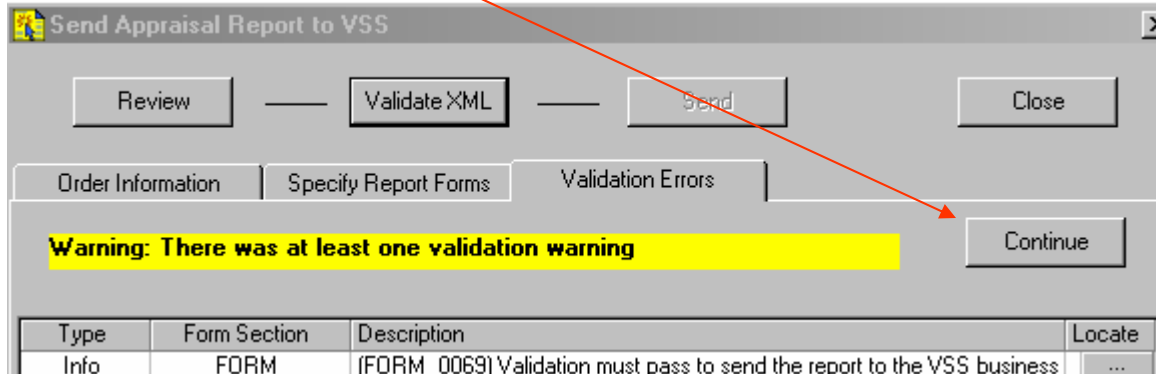
Type	Form Section	Description	Locate
Info	FORM	(FORM_0069) Validation must pass to send the report to the VSS	...
Error	IMPROVEMENTS	(IMPR_0047) # of Rooms is blank or < 1.	...
Error	SIGNATURE	(SIG_0001) Report is not signed.	...
Error	SIGNATURE	(SIG_0002) Appraiser's Telephone Number is blank.	...
Error	SITE	(SITE_0002) Site Area provided is unacceptable as they do not contain	...
Error	SITE	(SITE_0044) Utilities Typical is not indicated.	...
Warning	IMPROVEMENTS	(IMPR_0045) # of Bedrooms is blank or < 1.	...
Warning	IMPROVEMENTS	(IMPR_0046) # of Baths is blank or < 1.	...
Warning	SIGNATURE	(SIG_0003) Appraiser's Email Address is blank.	...
Warning	SIGNATURE	(SIG_0004) Appraiser's License Expiration Date is blank or invalid.	...
Warning	SITE	(SITE_0022) Zoning Classification may not be properly indicated.	...

Once all Errors have been fixed and you receive only Warnings or no Errors/Warnings, you are now ready to submit the report to Valuation Support Services.

STANDARDIZED XML

SENDING VALIDATED REPORT

To submit the report to Valuation Support Services (upon receiving no errors during validation), click on the **Continue** button.

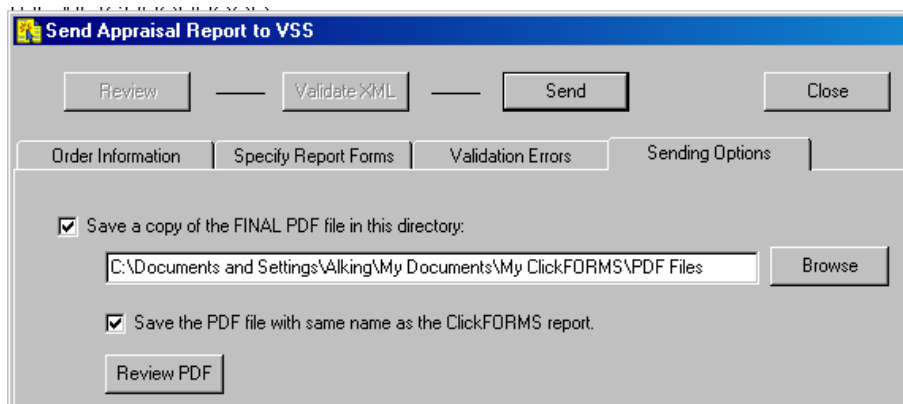


The screenshot shows the 'Send Appraisal Report to VSS' dialog box. It has tabs for 'Order Information', 'Specify Report Forms', 'Validation Errors', and 'Continue'. The 'Continue' button is highlighted with a red arrow. Below the tabs, there is a yellow warning box that says 'Warning: There was at least one validation warning'. Below the warning box, there is a table with the following data:

Type	Form Section	Description	Locate
Info	FORM	(FORM 0069) Validation must pass to send the report to the VSS business	...

A new tab called Sending Options will appear for you to designate where you would like a final copy of the PDF to be saved on your desktop machine.

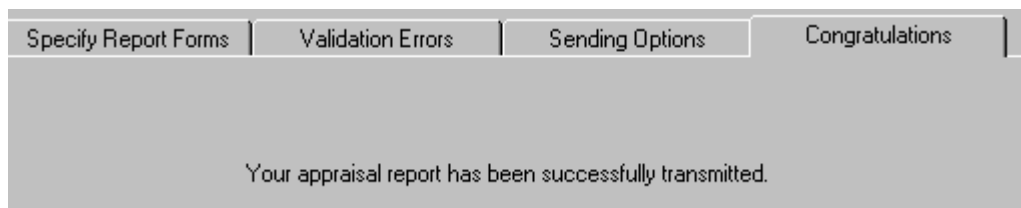
Click on Send. The report and PDF will be sent to Valuation Support Services.



The screenshot shows the 'Send Appraisal Report to VSS' dialog box with the 'Sending Options' tab selected. It contains the following options:

- ☒ Save a copy of the FINAL PDF file in this directory:
C:\Documents and Settings\Alking\My Documents\My ClickFORMS\PDF Files
- ☒ Save the PDF file with same name as the ClickFORMS report.
-

Upon successful transmission a Congratulations tab will appear indicating you have successfully delivered the appraisal report.



The screenshot shows the 'Congratulations' tab in the 'Send Appraisal Report to VSS' dialog box. It contains the following text:

Your appraisal report has been successfully transmitted.